



Gathering 4C information for the Medical Laboratory

Michael A Noble MD FRCPC

Chair – UBC Program Office for Laboratory Quality Management
Department of Pathology and Laboratory Medicine
University of British Columbia

In this presentation...

- What is happening in medical laboratories today with respect to listening to customers.
- Current strategies
- Some more active approaches that can be implemented.
- How to monitor customer opinions as a quality indicator.

Quality and the 4Cs

C

omplaints

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omments

ompliments



*What **are** people saying
about your laboratory?*

The definition of Quality



- The FIRST Absolute

Quality is defined as meeting the needs and requirements of your Customer.

Do you know

- who is your customer?
- what are your customer's needs and requirements?
- if you are meeting your customer's needs and requirements
- does your customer know if you are working towards meeting their needs and requirements?
- have your customer's requirements changed?

Customer focus is a medical laboratory accreditation requirement

- **ISO 15189:2010**
medical laboratories- requirements for quality and competence
- **College of American Pathologists**
Clinical Laboratory Improvement Amendments
- **ISO 9001:2015**
Quality Management Requirements
- **Accreditation Canada / Joint Commission**

So what are laboratories doing now?

- On-line survey - SurveyMonkey
- September 2016
- Single call-out invitation
- Participants in our POLQM Certificate Course in LQM
- Participants from Across Canada,
some from US, Saudi Arabia, Cambodia, China
- Anonymous responses only
- Information reward
- Commentary allowed.

So what are medical laboratories doing now?

Results

- **22 percent response rate**

high level confidence for representative of the whole group

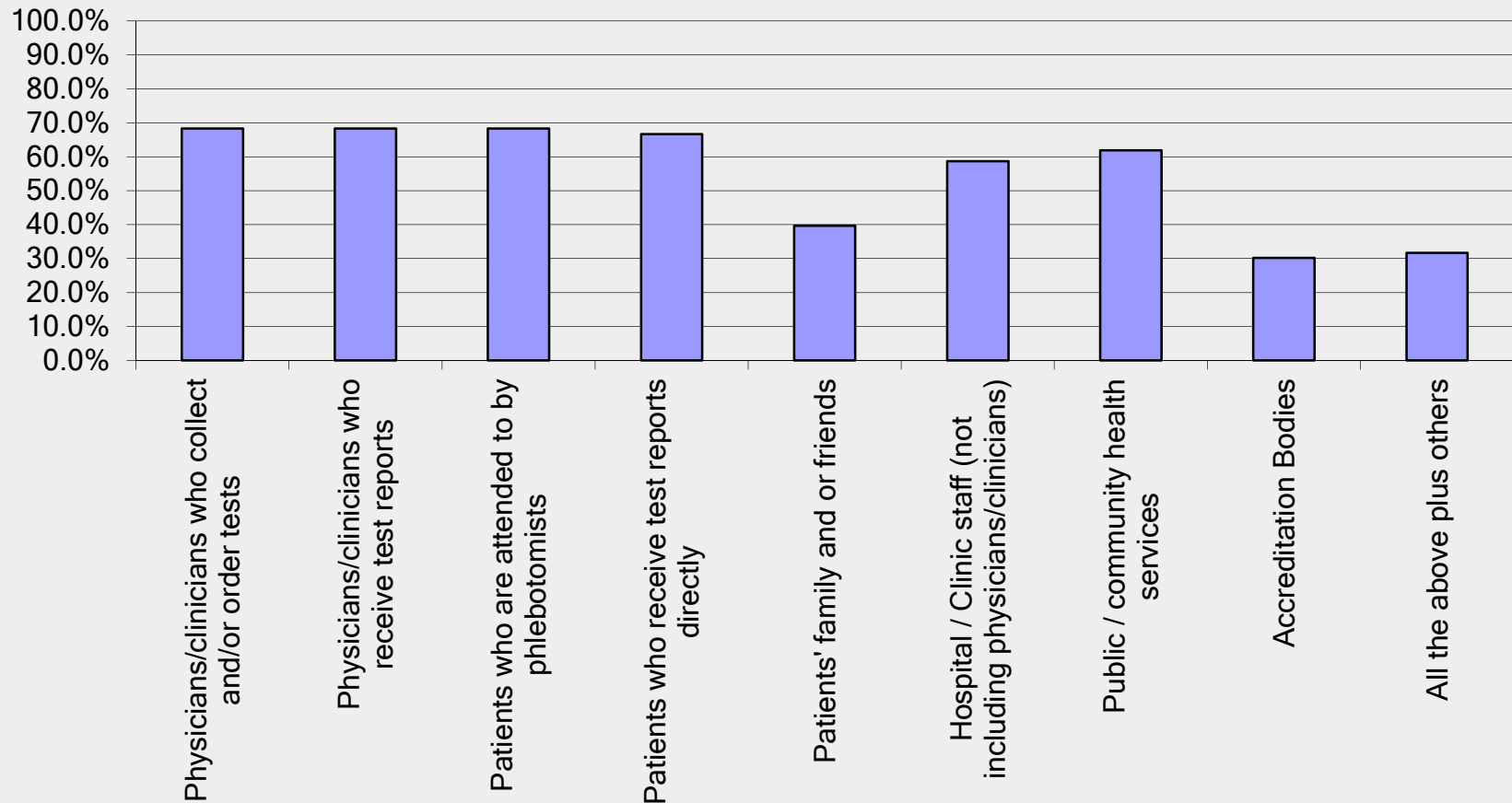
- **97 percent completion rate**

- **Reliability.**

Reasonable expectation

Monitoring Laboratory Customers

In your opinion who should a medical laboratory consider as an external customer? You can choose one or any or all of the groups



Gathering Customer Opinions

In your current position which of the following "customer needs" monitoring techniques are used by laboratory management and the Quality team. You can respond with a single, or multiple, or all

Answer Options	Response Percent	Response Count
Satisfaction surveys, either electronic or paper that are directed towards Physicians/clinicians	59.0%	36
Satisfaction surveys, either electronic or paper that are directed towards hospital/clinic staff	44.3%	27
Satisfaction surveys, either electronic or paper that are directed towards patients	59.0%	36
Information gathered from received (passively) complaints from physicians/clinicians	78.7%	48
Information gathered from received (passively) complaints from patients	70.5%	43
Information gathered from received (passively) complaints from others	39.3%	24
We also can actively seek out customer complaints, comments, concerns and complements.	31.1%	19
I don't have an opinion on this - or - I don't work in a laboratory or organization that gathers this information.	18.0%	11
Other (please specify)		3
<i>answered question</i>		61

How Do I interpret these results?

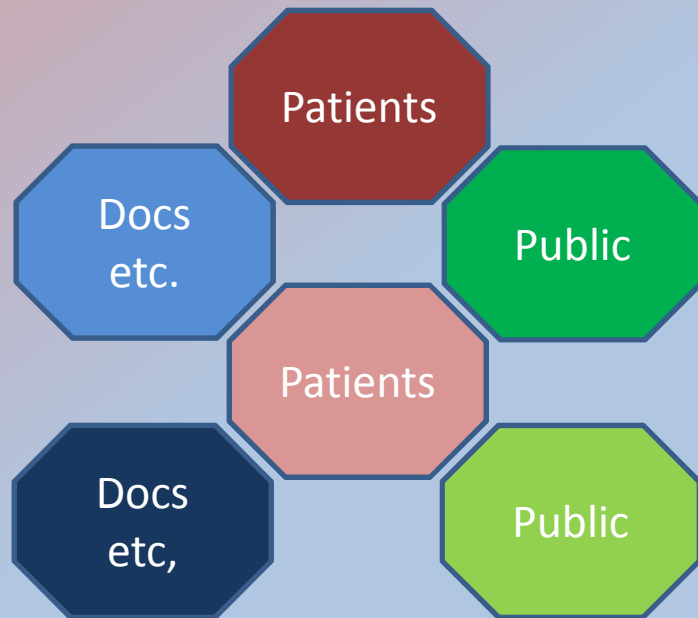
- With caution, the data suggests that:
 - Even in laboratories with staff with interest in laboratory quality management
 1. Perhaps as high as 30 percent do not have active customer recognition and monitoring programs in place
 2. For laboratories that do, the most common approaches to customer monitoring are PASSIVE.
 3. Some laboratories are working with on-line surveys

The Medical Laboratory Has Many Customers

(People with a vested interest in your laboratory's performance)

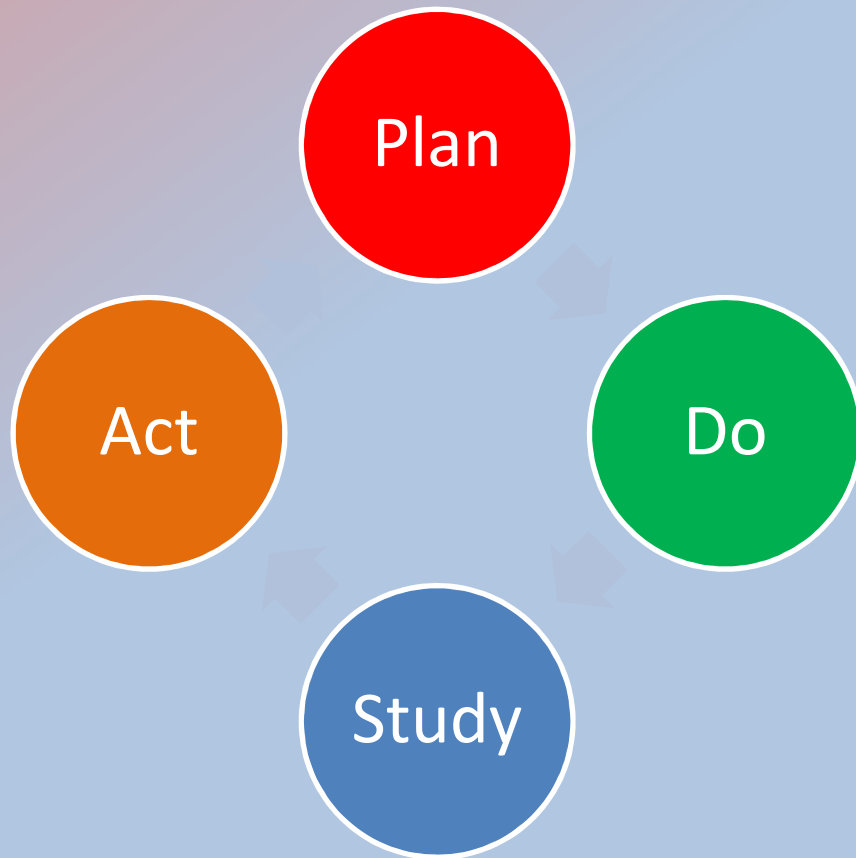
1. Physicians who order tests
2. Physicians who receive results
3. Patients who have direct laboratory contact
4. Patients who have direct access to results
5. Public health in all its guises
 1. Infection control
 2. Community health
6. Family, Friends, Contacts, Educators,

The Medical Laboratory Has Many Customers



- While these groups may have some overlap, they each have different needs and requirements that must be met.

Gathering Customer Information is one more Quality Indicator



- Plan your approach to gather and interpret
- Do your approach
- Study the results that your approach gave you
- Adjust and Modify your strategy and try again.

The Customer Comment Card



The Laboratory Comment Card

Your Name: _____

Date: _____

Your Complaint: _____

- Positives
 - Provides an opportunity to comment on service
- Negatives
 - **Passive**
 - If comment cards are not accessible, no Cs are received.
 - Captures only those sufficiently irate they will seek out the card
 - Incomplete and biased

The modern version of website or BCPSLS are fundamentally modern variations of the Comment Card with the similar result.

On-Line Surveys

- **Positives**

- Active process
- Relatively easy to set up
- Easy to analyze
- Potentially repeatable for long term evaluation

- **Negatives**

- Most on-line surveys are self defeating with a HIGH probability of unreliable information
- Done poorly, on-line surveys are “worse than not doing any investigation”

Think about your own experience with on-line surveys

Probably...

You (if you are anything like me),

- Rarely open them.
- Rarely complete them.
- Rarely provide useful information
- Get annoyed if surveys are:
 - Too intrusive
 - Too long
 - Too complicated

- If you want useful information ask people for the right information in the right way.
- If you want to guarantee failure, intrude on your customers' time, effort, and patience, and generosity.

Noble's Rules for successful surveys

- Never ask more than 10 questions.
- Never ask for more than 3 minutes of time.
- To the extent possible, avoid personal demographics.
- Never force an answer.
- Pre-test and keep the questions simple.
- Always provide contextual choices and an option to comment.
- Ask the questions than need to be asked, even if you may not like the answer.
- To the extent possible, offer a reward for participation.

<http://www.medicallaboratoryquality.com/2011/06/satisfaction.html>

Offering Choices

When you last had a conversation with laboratory personell, how did you find the conversation?

Contextual Choices

- Provided useful information and addressed my concerns
- Was polite and factual but didn't give me the information I needed
- Was factual but would not address my questions
- Not very helpful
- Abrupt and rude
- Comments:

Generic Choices

- Excellent
- Very Good
- Acceptable
- Not Very Good
- Terrible

Try this strategy for on-line Satisfaction Surveying

- Create a survey using the Rules
- Identify approximately 2-3 percent of the total population of customers using a random number generator, and send the survey to this group.
- Repeat using the same survey with random-sample every month for a minimum of 12 months. Do NOT remove people from the group.
- Analyse each sample individually and consecutively.
- Address the trends and observations.

Advantages of Sequential Analysis

- Each group is small, but large enough to give a snapshot of attitudes
- Since each group is getting the same survey, the information gives a series of snapshots
- A series of snapshots provides for trend analysis rather an “single moment in time”.
- Series strategy can allow monitoring point-in-time changes.

How To Reward Participants

Allow responders to see the accumulated results after they complete the survey.

Give responders access to a “participant” site for the total results at a set time upon completion.

Composite Graphics for Satisfaction Monitoring

While laboratories can (and should) monitor for a variety of data points, they can be combined into a single composite scale for ***simple visual analysis***

Clinical Microbiology Proficiency Testing (CMPT)

- Satisfaction Performance Scale is based on:
 - Survey Score
 - Open Comments –Positive
 - Open Comments – Negative
 - New Contracts
 - Contract Renewals
 - Contract Cancellations
 - Consults
 - Complaints

Composite Composition



Satisfaction Element is weighted for impact

Impact

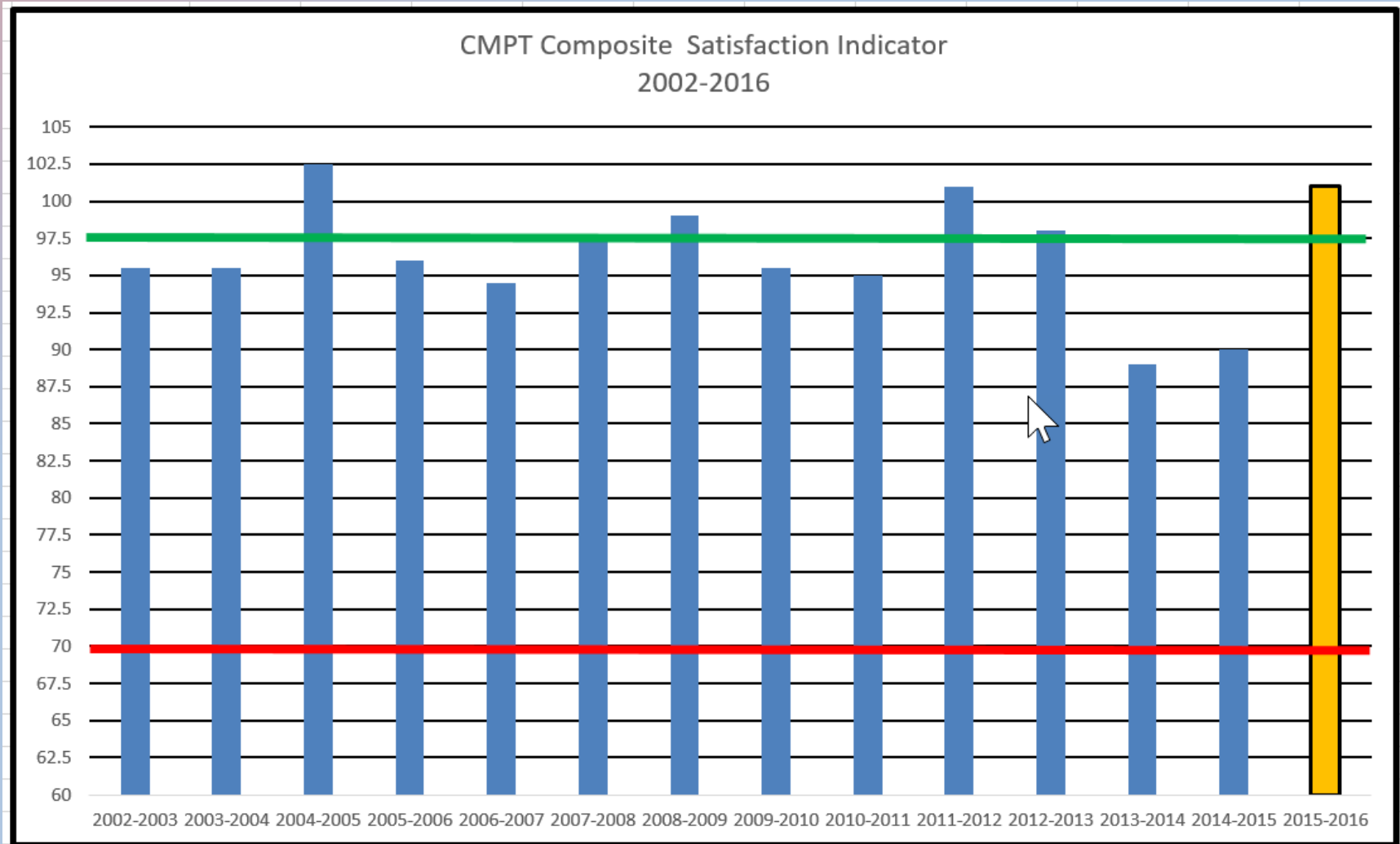
Survey Score	10
Open Comments –Positive	5
Open Comments – Negative	-10
New Contracts	10
Contract Renewals	25
Contract Termination	-100
Consults	5
Complaints	-25

In the Absence of Benchmarking...

we defined our own parameters for success and concern

Element		
Survey Score	90%	80%
Open Comments –Positive	Net 3	
Open Comments – Negative		Net 3
New Contracts	1	0
Contract Renewals	2	0
Contract Cancellations	0	0
Consults	0	0
Complaints	0	3
Value	97.5	70.0

CMPT Composite Satisfaction Indicator followed for 14 years post implementing ISO 9001



As a LAST thought

- Complaints, Concerns, Comments, Compliments
 - Most 4Cs do not come in the form of completed complaint cards, but as an E-mail or Telephone call or hallway chats.
 - Are **all these Cs** being captured and followed through?

In summary...

- There is room to grow interest in monitoring customer complaints, concerns, comments and compliments in medical laboratories.
- There are a variety of methods than can be implemented to help listen to our customers.

In summary...

Following customer satisfaction is at the very core of Quality and following customer satisfaction is appropriate and essential in the medical laboratory.

There is room to grow interest in monitoring customer opinions and satisfaction in medical laboratories.

Establishing customer satisfaction indicators is no more complicated than any other Quality Indicator.

in conclusion...

Identify your Customer
Identify the Methodology
Track Performance
Enhance Continual Quality Improvement