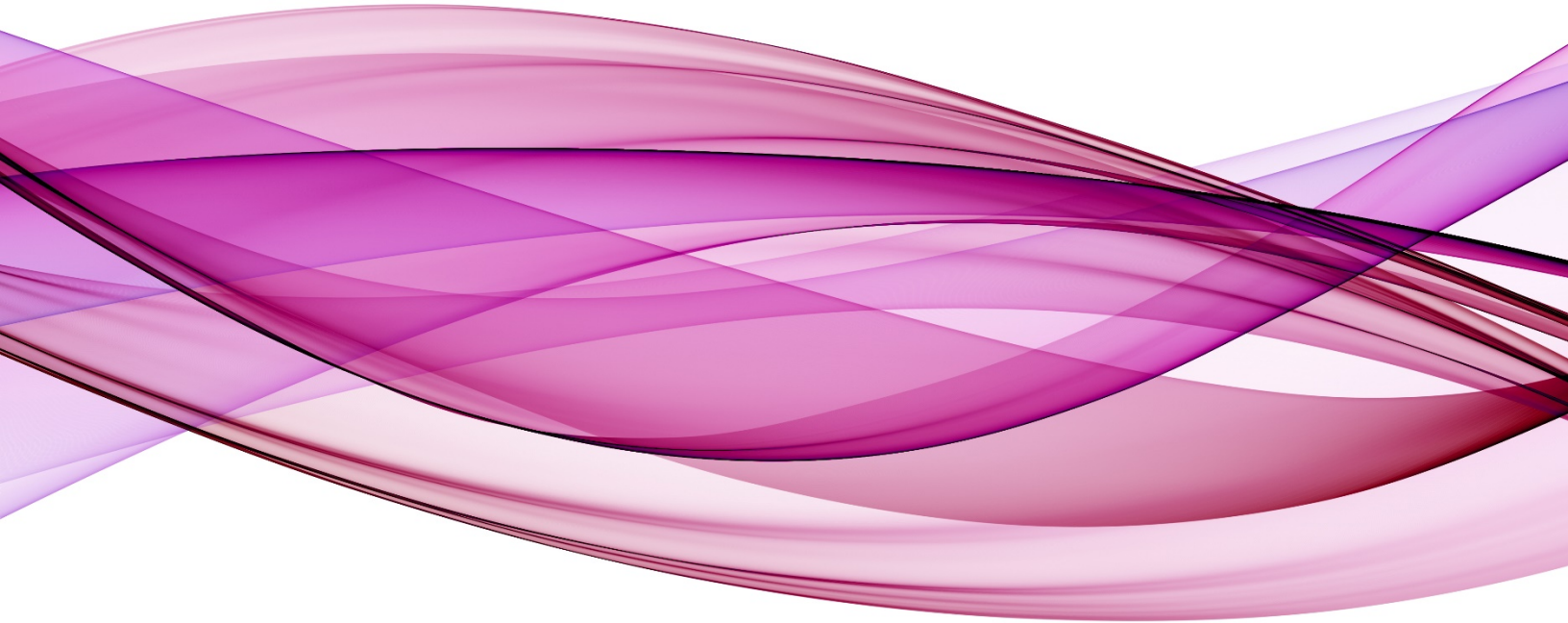


# Service Recovery Resource

*2019*



# Service Recovery

## Understanding the “Why”

We can all relate to times we have been disappointed by a service, restaurant, travel, or product experience. Chances are, there are instances when that individual or organization stepped in to recover your disappointment, as well as times when no one addressed your concern. How did their action (or inaction) influence your loyalty to that organization?

The reality in healthcare is that **recovering disappointments is profound to shaping the memories, referrals, loyalty, quality, and service outcomes**. We are a high risk, high emotion industry and despite our calls to serve and missions, we can make mistakes. According to research, 55% of individuals are already worried something might go wrong during their hospital stay<sup>1</sup>. Knowing we must work harder and harder to meet the demands of patients and consumers across our diverse continuum of care settings, evaluating the effectiveness of your service recovery process can pay dividends in creating patient and family loyalty.

## What is Service Recovery?

Service Recovery is a communication practice and process (including a set of tools and techniques) that can be used to make things right after something has gone wrong with the healthcare experience.

Service Recovery activates the instant we identify we have not met the patient or their loved one’s expectations

*When does it matter most?*

- When a patient or a loved one is upset
- Failure to follow up on a request
- Wrong dietary order or something is missing
- Inappropriate or rude behavior from staff
- Lost or misplaced belongings
- Long waits without providing updates

**Or, any situation that embarrasses, inconveniences, angers, or disappoints a patient or their loved ones.**

“When it comes to service recovery, there are three rules to keep in mind:

1. Do it right the first time.
2. Fix it properly if it ever fails.
3. Remember: There are no third chances<sup>2</sup>.”

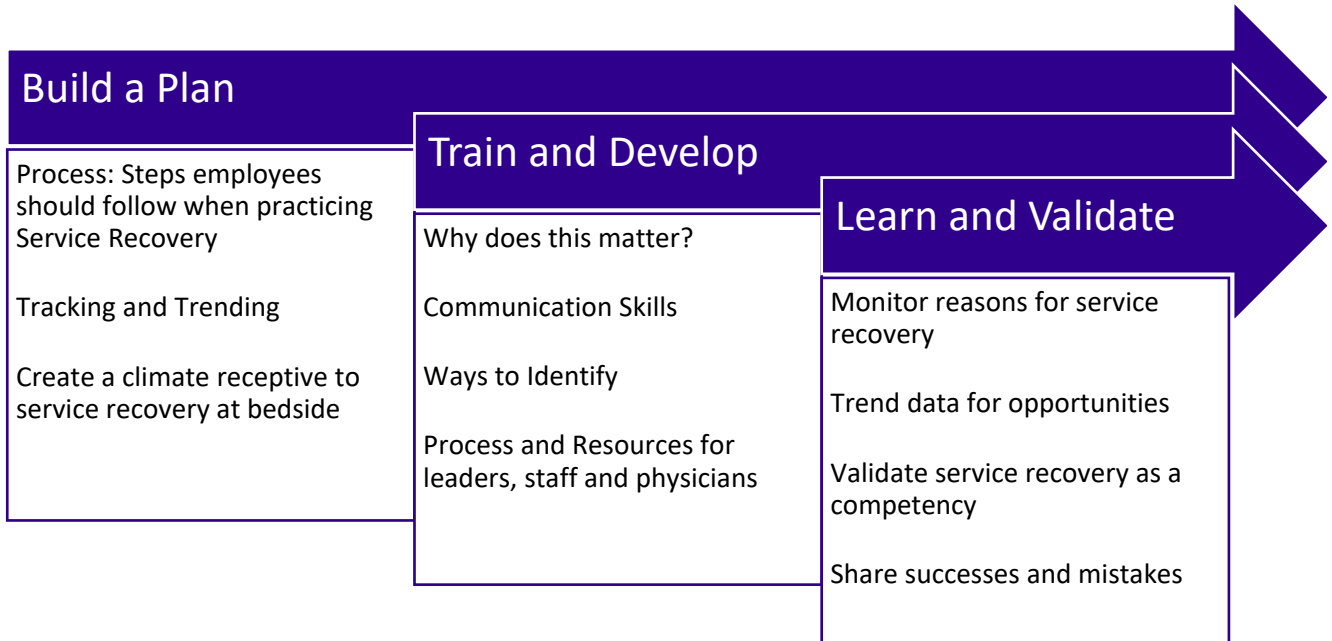
Our collective experience with over 400 healthcare organizations has demonstrated that successful service recovery achieves important results:

- Creates customer loyalty
- Turns negative encounters into positive ones
- Empowers staff
- Improves Patient Experience performance
- Can reduce complaints and grievances

1 Health Pulse of America Center for Survey Research – State University of New York, Stonybrook  
2 Berry L. *Discovering the soul of service: The nine drivers of sustainable business success*. New York: Free Press; 1999.

## 6 Key Service Recovery Behaviors and Processes

1. Create a culture of responsiveness to patient and family needs and expectations
2. Equip all employees to address a service failure
3. Turn a negative situation into a positive one
4. Prevent a negative situation before it occurs
5. Have the practice, policy, and procedure to address a situation
6. Monitor trends and opportunities to improve



## Matching Appropriate Service Recovery

Not all service recoveries are the same. It is important as an organization to establish tiers of service recovery that work in accordance with complaint, grievance, and risk management expectations. Additionally, similar service failures (e.g., wait times, lost item, rudeness) can cause different reactions among individual patients and families. Our team has included some examples for consideration:

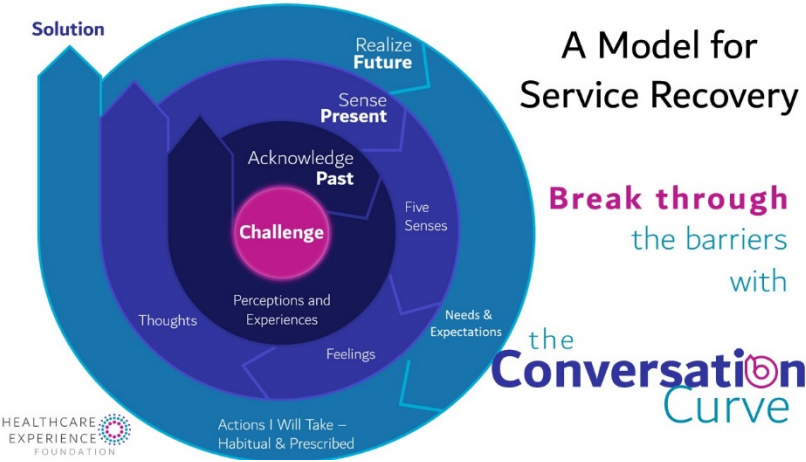
Recovery Category:	Strategy	Sample Situation	Example Resolution
Mild	<ul style="list-style-type: none"> <li>• Low level service recovery strategy</li> <li>• Complaint can be immediately resolved or prevented. Verbal or written apology</li> </ul>	Food delivered cold Moderate wait Staff rushed/not listening	Correct Issue Apologize Clarify misunderstanding and intent

Recovery Category:	Strategy	Sample Situation	Example Resolution
Moderate	<ul style="list-style-type: none"> <li>• Mid-level service recovery strategy</li> <li>• Verbal or written apology</li> <li>• Visit from manager; small gift; written response to complaint</li> </ul>	Long Wait Noise at night Canceled appointment Discourtesy Not delivering medication on time	Apology Small Gift Possibly written response Visit from Senior Leader
Severe	<ul style="list-style-type: none"> <li>• Written response within 7 days</li> <li>• Refer to Risk Management/Legal</li> </ul>	Injury Rudeness	Contact Manager/ Patient Advocate/Risk Management/Legal per policy

### Leveraging Service Recovery- The Conversation Curve™

At the heart of service recovery is recognition that a conflict has occurred and taking swift action **resolve the issue** and **build trusting relationships** with patients and their families. Our team has developed a successful tool, the Conversation Curve to support leaders, staff, and physicians with the communication skills and resources to embrace service recovery.

The **Conversation Curve** builds upon the perspectives of patients and families and matches their perceptions to communication and actions your employees can take. We begin by building assessing your current patient experience and likely service failures, build service recovery communication competencies to Acknowledge Past, Sense Present and Realize Future, and line up the practice of service recovery with your expected internal processes. Our goal is to align with you in building a culture that is responsive to patient and family needs and exceeds expectations.



#### Step One: Identify and Name the Challenge

Our experiences have demonstrated that the first, critical step is to develop your leaders, staff and physicians/providers to pay attention to cues such as; tone of voice, body language and specific words or phrases that indicate a patient or loved one may be upset or disappointed by their experience. Additionally, anticipating situations when we know we have long waits, canceled appointment, etc. can help us empathize with patients and address a service failure early or before it happens. It is important to

be able to get the patient/family member to name the challenge and for the receiving employee to validate the issues in the patient/loved one’s words.

**Naming the Challenge answers the question: What are we trying to resolve/solve here?**

**Step Two: Acknowledge the Past**

The FOUNDATION of every productive conversation is acknowledging that you come into any conversation with your own reality and the patient/family has their own reality based on everyone’s unique past perceptions and experiences.

It is so important to acknowledge the patient and family members reality and subsequent emotions. In the words of Anais Nin, “we do not see things as they are, we see them as we are”. Our perspective as healthcare employees may be a normal day or we view our own intent in a situation; however, the patient or loved one may see the same situation very differently.

Exercises to build team agility in service recovery situations include role plays that afford team members the chance to brainstorm likely expectations, disappointments, feelings on our and the patient/family part.

Our Perceptions and Experiences	Patient/Family Perceptions and Experiences

**Step Three: Sense the Present**

The goal in Sensing the Present is mutual understanding and demonstration of empathy. The following steps can build staff and leader confidence interacting with patients and family when conflict emerges.

Name the challenge in present tense: *I understand that we have disappointed you by canceling your appointment. Especially after you have driven to the surgery center.*

Describe with senses: I feel, see, smell, hear. For instance, I can see that you are upset and am sorry.

Thoughts and feelings: Explain how this issue impacted the patient. Note: Sometimes it is important to get further information from the patient. Intentional questions can draw helpful information to arrive at a solution:

- Can you help me understand?
- Can you describe for me what you wished would have happened?

As the patient shares their story, it is important to continually empathize and honor their perspective.

## Step Four: Realizing the Future

The goal in Realizing the Future requires partnership for a mutually agreed upon solution. In this stage, we want shared agreement for actions that lead to success.

Describing your expectations and next steps can help reinforce trust between the employee and the patient/family member. Coming to mutual understanding can affirm the patient and/or family perspective and create transparency in our intent. Here are some examples:

- Here are my expectations of our team
- I want to find a way to make this right for you
- I need us to work together to determine the best plan to successfully resolve this issue
- I wish that did not happen

Actions I will take/ Actions I need to ask of you provides clarity for next steps. Some words and phrases include:

- Here is what you can expect from me
- Here is what I can/cannot do
- Here is what I need to ask from you
- How might we help/resolve \_\_\_\_\_?

## Step Five: The Solution

Regardless of our BEST intent, service failures happen. Moving to the solution requires commitment and agreement from the patient and family member. While this may sometimes feel difficult for staff, successful service recovery is not about “winning” or being “right”, it is about affirming the patient and finding a means to WOW them when we have disappointed them.

An important question to ask is, “Will this be acceptable to you?”

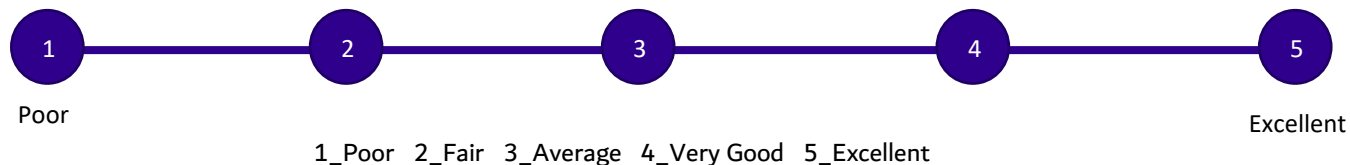
## Building Team Comfort

Taking the opportunity to develop your staff with service recovery skills will save time, stress and financial resources. Additionally, there is a strong likelihood managing conflict with patients in a way that builds trust can impact quality outcomes. Here are a few scenarios to build staff comfort and have open discussion as a team. Role Play:

- Agitated Patient has been waiting for two hours in the ED to see the physician, no one has updated the patient
- Patient family member overheard staff talking about a sensitive matter that upset the patient
- Walking back into a patient room and realizing you forgot to get patient something they requested an hour ago
- Patient is angry about a perceived billing discrepancy between the hospital and the physician practice

## Challenge Questions

Using the following scale, rate each statement based on the degree to which it describes your communication, actions or behaviors at work. Identify the number that represents your rating



1. We have a culture that embraces and acknowledges service failures	① ② ③ ④ ⑤
2. Our staff look for cues that indicate confusion, fear, anxiety, and anger	① ② ③ ④ ⑤
3. We have clear expectations for what we expect and empower each employee to do in the event of a service failure	① ② ③ ④ ⑤
4. Staff and leaders have communication competencies to successfully address patient conflict	① ② ③ ④ ⑤
5. Front line employees are equipped and engaged to perceive service recovery situations and act with confidence to recover	① ② ③ ④ ⑤
6. We have practices in place to track and trend service recoveries to learn and improve	① ② ③ ④ ⑤
7. We reward and recognize successful service recoveries	① ② ③ ④ ⑤
8. We debrief service failures to look for the learning	① ② ③ ④ ⑤
9. Rate the effectiveness of your service recovery process being used today to achieve outcomes	① ② ③ ④ ⑤
10. We have strong teamwork with Risk Management/Compliance for recoveries and grievances	① ② ③ ④ ⑤

### Discovery and Inquiry:

- What is your current practice for responding to patient and family concerns during stay/visit? Post visit via survey, social, discharge calls?
- Who is involved? What is the process?
- What are the expectations for responding to concerns?
- How do you formally manage complaints?
- What are three vulnerabilities of your service recovery program that you want to address?

Self-Reflection

When was a time that service recovery was effective? What made it effective?

When was a time service recovery was ineffective? Or we missed the mark? What went wrong?

What are the two-three things I need to do differently this time to make us successful?

1.

2.

3.





## How We Support Your Service Strategy?

At the Healthcare Experience Foundation, we work with organizations to establish and/or elevate Service Recovery Programs where leaders, staff, and physicians are trained, equipped, and given resources to succeed. Utilizing our Learn.Create.Realize Methodology we can personalize a path for successful sustainable service recovery in your organization.



validation and growth.

**Learn:** Understand your current Service Recovery processes and practices, personalize the “why” for service recovery, establish goals

**Create:** Build/enhance Service Recovery expectations, desired competencies, systems of measurement and accountability, design new employee/leader orientation

**Realize:** Build communication and process competencies, develop leaders to support success, monitor and adjust based on progress, establish internal coaches to support

Our team offers a variety of training and coaching solutions to support **service recovery** success with both the practice and process including:

- Speaking Engagements
- Targeted improvement and training
- Coach Certification

For more information, please contact Barry Fleming at [Barry@healthcareexperience.org](mailto:Barry@healthcareexperience.org).

# About the Healthcare Experience Foundation

**Mission:**

Transforming the healthcare experience

**Vision:**

Shaping cultures through innovation so every person can receive and deliver the best healthcare

## Stay Connected



