Yielding Hidden Gains: Investing in the Front Line



Submitted By: Kathleen M. Peterson, Chief Vision Officer, and Deborah J. Gefteas, Ed.D., Senior Vice President, PowerHouse Consulting, Inc.

Just ask Amy Zylstra, Associate Executive Director of Penn Medicine's Marketing Contact Center (MCC) in Philadelphia. She will tell you that her biggest take away from the disruption of the 2020 pandemic is that the training, optimization, and performance initiatives begun in 2019 drove a “new culture” within the Contact Center.

A new culture was exactly what was needed to take on Covid-19 and its many issues. According to Amy, "We learned and implemented a new way of thinking based on honing in on relevant issues, solutions, actions, results, and priorities. We changed our mindset. *How does what we do help the Penn Medicine Health System and how do we fit in?* This new thinking led MCC leadership to view within a different lens that yielded a higher level of confidence in interacting with other departments, taking on new programs, and nimbly implementing a solid Work from Home (WFM) program.

Background

The Marketing Contact Center's entire team contributed to several optimization initiatives in the months prior to March of 2020 when shutdowns became a reality. In collaboration with PowerHouse Consulting, Contact Center leadership had participated in operational brainstorming sessions, custom-built leadership workshops, and process improvement activities. Both incumbent and new- hire staff were supported via a set of training modules focusing on Healthcare communication, de-escalation techniques, and creating positive experiences for patients. We focused on solutions that lynch-pinned to the core values of Penn Medicine. As well, the most critical and frequent work processes were identified and documented within branded Quick Reference documents.

Deborah Gefteas, PowerHouse Learning and Performance lead, worked with the MCC team to design, develop, and implement a comprehensive new-hire learning program that combined both transactional and human elements. According to Deborah, “When leadership and the front line align to a common set of Penn Medicine values and objectives, staff learn and internalize the fine art of issue identification, collaboration, and communication. When you combine that with empathy and



emotional Intelligence, the impact is compelling! The effect is emotionally felt and visibly discernible.”

So how did all this help the Marketing Contact Center react to Covid-19? Interestingly enough, the Leadership Team had essentially had a few months to "practice" new skills and approaches to problem identification, prioritization, and resolution. It was almost unbelievably good timing as the team was well-prepared to work together to handle the crisis. Amy puts it this way, "We were able to implement Work from Home with ease and efficiency … the process could

have been much more cumbersome had a new collaborative culture not emerged."

Pandemic Madness

In March of 2020, most Healthcare systems faced, with stunned disbelief, a number of challenges that happened simultaneously. Elective medical procedures were being cancelled or postponed. Penn Medicine (and others) turned off online scheduling, ramped up for telemedicine scheduling (a daunting experience for many), and crafted plans for Work from Home. For WFH, there would normally have been a mountain of analysis, project meetings, ROI discussions, proof-of-concept, etc. But due to Covid-19, previous WFH learnings were coupled with the sudden decision to move forward.

The WFH effort at Penn Medicine required laptops to be imaged and a remote workforce to be deployed (in phases) and overseen. It would be necessary to communicate to staff to keep them up to date and to message the communities served. This particular effort led to the first iteration of Penn's Covid-19 website. Amy states, "Initially, Covid-19 content on our website was a single page that described basic facts about the virus. At this time, everyone thought a two-week quarantine would be enough. Oh, how wrong that assumption turned out to be. Social media postings were on the rise. Between March 30th and April 5th, there were nearly 200,000 COVID-19 pageviews."

From late March through early June, there was a slight reduction in call volume in many Healthcare systems, Penn included. As demand began to ramp back up, The Contact Center's WFM teams were all deployed and performing remarkably well. Penn found that there were fewer call-outs and sick days, less absenteeism, fewer childcare and transportation issues, and yes, higher productivity! Again, staff training, branded materials, documented processes, and solid communication contributed to keeping up with the purpose of their work … to help patients.

Hidden Gains

As part of our work with Penn, PowerHouse created forecasts for staffing models to assure that resource allocation was sufficient to meet demand. The case was made, funding was approved, and the hiring began. Hiring for remote workers was another new experience in the WFH journey. Hiring methodologies already in place were augmented by identifying required WFH human behaviors and competencies. We also re-structured classroom training for virtual delivery. Required tasks were identified and completed with speed and efficiency. MCC leadership was able to attract, interview, hire, and train 26 new people "beautifully." (In all, staff from agencies well-qualified and highly skilled.)

The MCC team was faced with many tasks related to moving more than 100 people to a Work from Home (WFH) model within a very short timeframe. In some ways, the tasks became less onerous because staff at several levels had mastered the ability to focus, communicate, and get things done by working together.

Desired Competencies for Work From Home

Amy Zylstra and her team at MCC identified specific competencies, behaviors, and skills that are especially critical and germane for WFH staff. These are summarized below.

• *Instills Trust*—Gains caller's trust via voice and tone; is welcoming, listens, shows desire to help, is approachable, establishes human connection, is empathetic, is non-judgmental of caller and Penn Medicine colleagues, and has a sense of confidence.

• *Values Differences*—Is able to work with colleagues in direct office and other offices remotely; recognizes unique needs of callers with different norms; honors history and traditions of caller's story; listens and learns from colleagues' experiences; displays sensitivity in communications based on differences noted.

• *Focuses on Patient/Customer*—Listens and elicits caller's need; is able to complete searches in Salesforce to offer options; gains trust, keeps communication open-ended, and recognizes caller preference; gives full attention to caller at all times; relays appropriate information to

scheduler; warm transfers caller whenever possible and appropriate.

• *Thinks Critically and Solves Problems*—Uses resources, knowledge, and logic to solve problems; learns and uses Salesforce call management appropriately; asks questions, seeks assistance when needed, and reviews resources independently. Evaluates a situation from different perspectives and seeks the best option for a specific caller's needs; has ongoing interest in learning.

• *Collaborates*—Displays willingness to work with others; effectively warm transfers callers through professional communications with colleagues in other offices; thinks "we" and not "me"; offers suggestions when opportunity for process improvement exists; is willing to participate in both inbound/outbound work programs.

• *Communicates Effectively*—Listens, speaks and writes to be understood; adjusts communication style to fit the situation; promptly offers feedback/information to management when needed.

• *Ensures Accountability*—Takes personal responsibility for daily work, future assignments, and success of the office: attendance, accurate call management/call documentation, self-review of individual Salesforce Dashboard, and time management; acknowledges actions/decisions/areas for personal growth.

• *Demonstrates Self-Awareness*—Recognizes strengths, weaknesses, opportunities, and limits; learns from mistakes/experiences; seeks feedback for improvement and growth without being defensive.

The Takeaway

Contact Center staff are ESSENTIAL workers! They are a key resource for patients that need both care and a reassuring and soothing voice. The delivery of a positive and memorable Patient Experience is particularly important during a time when Healthcare organizations are seeking to recover lost revenues. Investing in the hiring, training, coaching, staff development, and retention of Contact Center frontline workers will yield untold gains in the months and years to come. ■

Kathleen Peterson, Chief Vision Officer, is an internationally acclaimed Contact Center and Strategic Management expert and recognized industry leader. She has emerged as a sought-after expert and consulting partner in the field of the Patient/Customer Experience. Kathleen has worked with top patient/customer-focused organizations including NYU Langone Health, Ralph Lauren, Tory Burch, BayCare Health System, Comcast, and Penn Medicine. She is Founder and Chief Vision Officer of PowerHouse Consulting. With more than 30 years in the Contact Center industry, Kathleen leads strategic initiatives with client senior management across industries to assess business processes and improve organizational practices.

Kathleen is the author of many stirring Healthcare articles. She is a regular contributor to Contact Center Pipeline, a monthly instructional journal focused on the needs and challenges of the Contact Center industry, via her Idiom Insights and Healthcare Corner articles.

Kathleen has been the keynote speaker at conferences across the globe. She has been a featured speaker at the Healthcare Call Center Times Conference and UWEBC Business Best Practices and Emerging Technologies Conference. She is a "working" speaker, bringing energy and real-life experience to all engagements. Kathleen's eBook, Backstage at the Customer Experience…Musings for Contact Center Leaders, is available for purchase at Amazon.com.

Available now, you can listen and subscribe to her new podcast, Backstage at the Customer Experience here; https://powerhouse1.com/backstage-at-the-customer-experience/. For updates and more follow Kathleen on Twitter via @KMP603.

DEBORAH GEFTEAS, ED. D., is Senior Vice President of Consulting Services at PowerHouse and the leader of our Learning and Performance practice. With PowerHouse since 1999, Deborah advises our teams on data gathering methodologies, standards, and approaches. She brings significant analytical expertise to projects, especially in the areas of group dynamics, process analysis, and information architecture. Deborah is a seasoned instructional designer and trainer with extensive experience in the design, development, and deployment of ground-up learning programs for Healthcare and other industries.