Cleveland Clinic

Society of Sensory Professionals

# About Michelle

- Director, Market Research & Insights
- BBA,MA
- At Cleveland Clinic for 23 years +
- Two teenage daughters
- Enjoy traveling with girlfriends for a break





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# Emotions & Empathy Research

October 28, 2016

Michelle Gandolf Frietchen
Director, Market Research & Insights
Cleveland Clinic



Cleveland Clinic

| 4362 | 9 | 18 | 49K+ |
|---|---|---|---|
| BEDS SYSTEM WIDE | COMMUNITY HOSPITALS | HEALTH CENTERS | CAREGIVERS |

*6,620,000+*
Patient Visits

*$6.5b*
Revenue

*>150*
NE OH Locations

National & International

*Florida*
*Nevada*
*Canada*
*Abu Dhabi*
*London (2020)*



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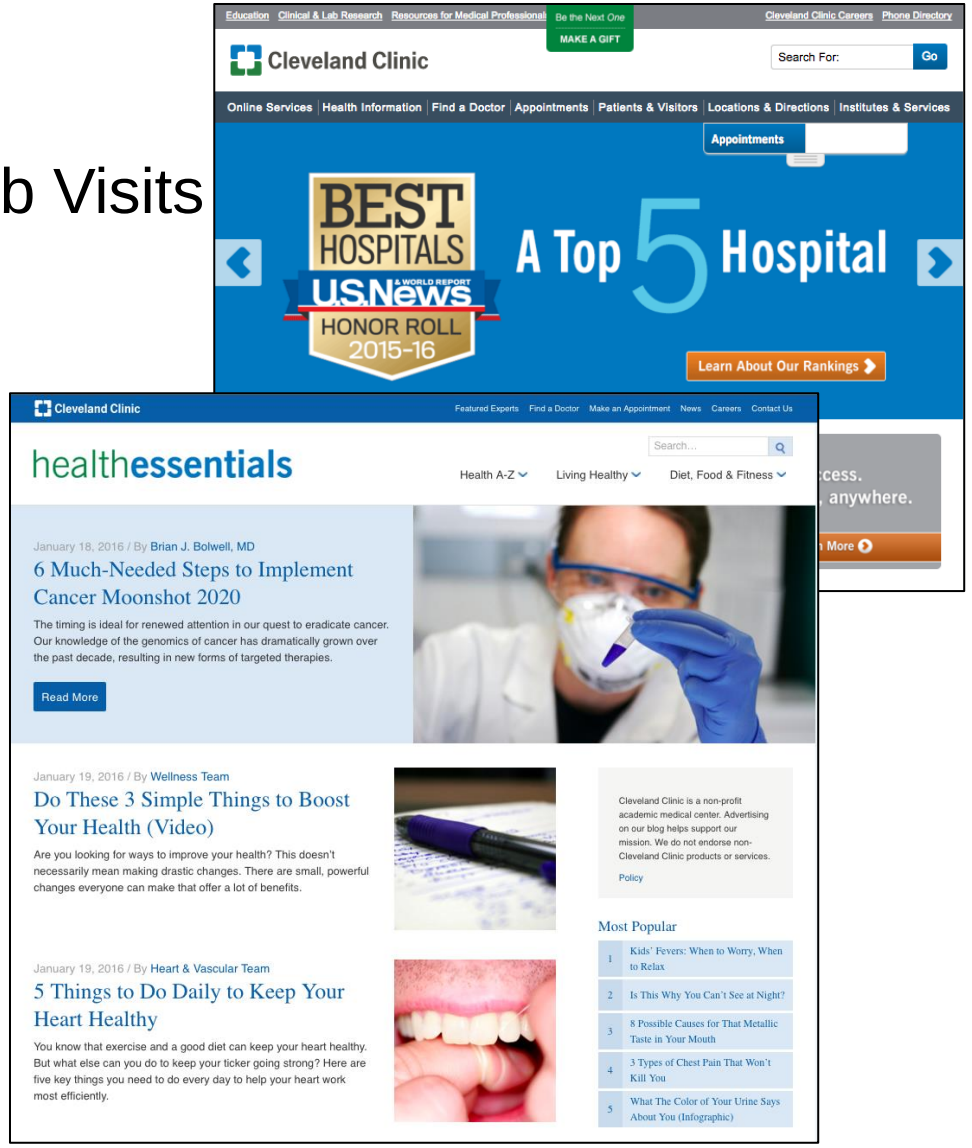
8M Average Monthly Web Visits

1.5M Likes

550K+ Followers

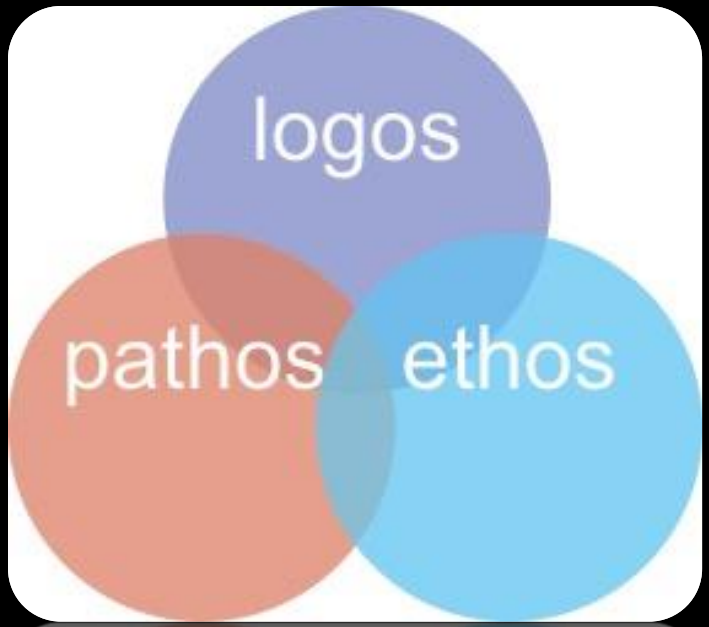
11.6M Views



# Past Emotions Research

Up to **70%** of decisions are largely based by emotion.
(Source: Daniel Kahneman)

Emotions constitute powerful and predictable drivers of decision making.
(Source: Lerner, Li, Yaldesolo, Kassam – Annual Review of Psychology)




Modes of Persuasion

"People will forget what you said, people will forget what you did, but people will never forget the way you made them feel."

- Maya Angelou

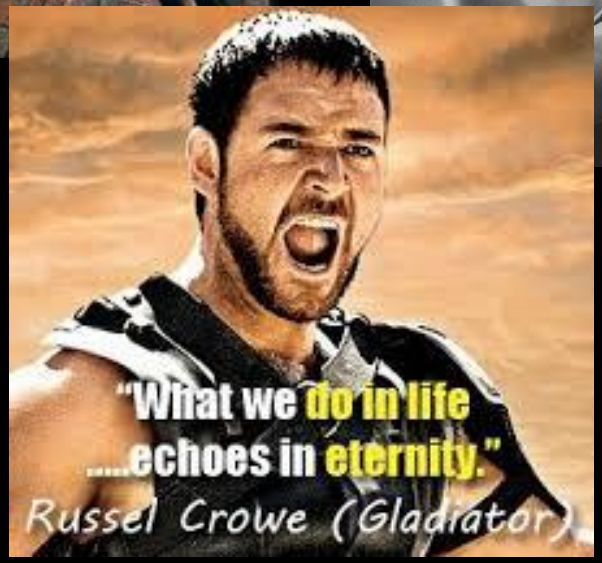
# Examples of Emotional Speeches




Braveheart



Julius Ceasar




Gladiator

# All Emotions are Necessary

Movie: Inside Out




Depicts…

*how* our emotions rule our actions…

how emotions *work together* to process information.

# Goals for Today

- Learn how Cleveland Clinic transformed its orientation and on-boarding process based in part by emotions research
  - Review Two Phases of Emotions Research
    - Emotions Video / Patient Vignettes
    - New Caregivers Orientation Process
    - Training of Frontline Clinical Caregivers
  - Market Research Toolbox
    - Learn new tools to incorporate at your organization



*Relevance to All Industries*

*Impact of Market Research Studies*

# Our CEO’s AHA Moment



# Emotions Research: Phase I

- Objectives
- RFP Process
- Selection of a Business Partner
- Key Themes



# Objective of Research

- To understand the emotions patients go through before, during and after their patient experience in order to identify opportunities for frontline caregivers to be more sensitive and provide the appropriate level of care.

- To develop a more holistic and emotive view into the patients' journey – beyond "satisfaction and testimonials."

*OPE, Media Production, HR…*



# Suggested Approaches

- **Approach #1:**

  Mobile Mass Ethnography / Work Shop / Immersive Community

- **Approach #2:**

  One-on-one in-person interviews with stakeholders,

  Patients and caregivers (loved ones)

- **Approach #3**:

  Intense 30-45 minute telephone Interviews

- **Approach #4**:

  Ethnography Solely

# Concerns with Research Approaches

- Not Recall Raw Emotions Experienced
- Forgiveness Factor Effect
- Insensitivity of Asking During the Experience
- Long Day
- $$ for a non-profit organization



# Approach Used

- **Contacted the patient *prior to* their appointment**
  - Signed release Form for Video Submissions
  - Potential use of video recordings
- **Conducted *Pre-Interview***
  - *How they feel Now – Baseline Emotions*
  - Scheduled a phone call *soon after* their appointment
  - Sent scale to be used and core questions to be asked in advance
  - Informed them to document blood pressure readings
- **Conducted Post-Interview via Telephone Shortly After Experience**
  - Ask about experience…
    - During, immediately after and what experiencing NOW - Core Touch Points

Encouraged to make video's on cell phone

# Methodology

- **Included a nice mix of:**
  - Outpatients / Inpatient
  - Type of Appointments / Procedures
  - Institutes
    - Heart & Vascular
    - Cancer
    - Digestive Disease
    - Neurological
    - Orthopaedic & Rhemeumatologic
    - Urological



# Methodology



- **Recruitment Process**

  Outpatients:

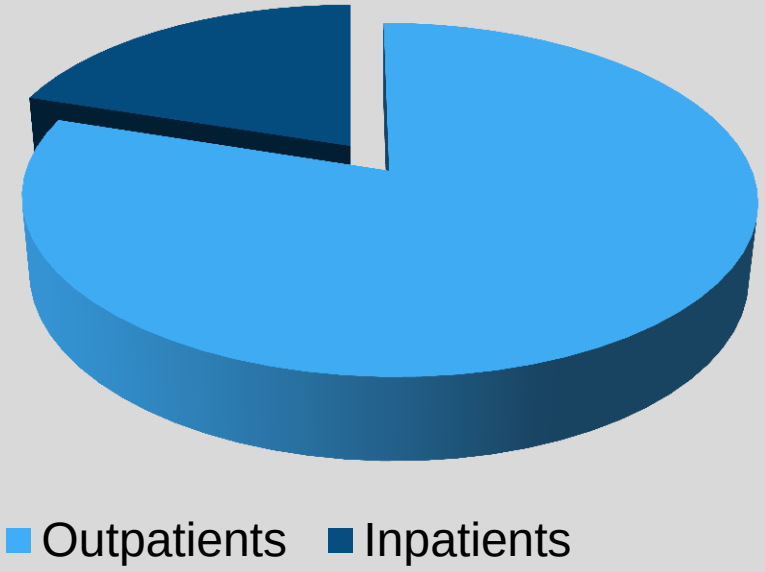
  – Patient List

  – Patient Online Community

  Inpatients:

  – Volunteer Services at the Bedside

- **120 Interviews Conducted**
  - –80% Outpatients
  - –20% Inpatient
  - –20 per Institute



# Scale

40%

| | | |
|---|---|---|
| **1** | Not at all nervous | Feel normal and no different |
| **2** | Slightly nervous | Try not to think about my appointment and/or results |
| **3** | Somewhat nervous | Can't wait for this to be over; feeling impatient. Worried a little and somewhat withdrawn |
| **4** | Very nervous | Trouble sleeping; can't sit still; heavy sighs, quiet and withdrawn or controlling my environment (i.e. last minute house cleaning, keep reviewing appointment details) |
| **5** | Extremely nervous | Heart racing, feel like fighting or running away, unable to listen and follow instructions |

*"Better because it gives you the option to help you specifically state how you feel, while also describing your feelings. Sometimes I'm unable to put my feelings into words and seeing them spelled out in front of me eases that anxiety."*

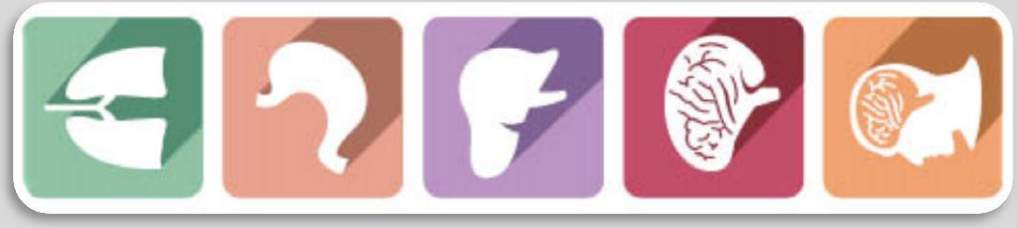
# Audience Poll

## Differences by Type of Participants:

- **Male vs. Females?**



- **By Institute?**



Heart, Cancer,
Digestive Disease,
Neurology, Orthopaedics/Rheumatology, Urology

- **Type of Appointment?**
  - **— Inpatient vs. Outpatient?**





# Other Scales Tested

22%

## 10 Point Anxiety Scale with Physical & Emotional Descriptions

| Rating | | Physical | Emotional |
|---|---|---|---|
| 1 | Normal | Normal or no difference | I felt normal and felt no difference before my appointment |
| 2 | Mild | Trouble sleeping | I tried not to think about what's ahead with my appointment and I woke early in anticipation for my appointment |
| 3 | Mild | Trouble sleeping; Twitching body (foot tapping, hair twirling, knee bouncing) | I worried a little and was somewhat withdrawn before my appointment |
| 4 | Mild | Trouble sleeping; Twitching body (foot tapping, hair twirling, knee bouncing); Headache | I have been feeling nervous, withdrawn or controlling before my appointment test |
| 5 | Moderate | Trouble sleeping; can't sit still, Shallow breathing; Heavy sighs, quiet and withdrawn or controlling my environment (i.e. last minute house cleaning, re-packing, reviewing all the notes before procedure) | I can't wait for this to be over; I am beginning to feel impatient with my doctor and the staff |
| 6 | Moderate | All of the above plus - pacing, difficulty focusing, not listening to caregiver | I am afraid of the outcome of my appointment |
| 7 | Moderate | All of the above plus - anger over small things because you feel out of control or you find it easy to cry | I am anxious about the pain; I can't wait for it to be over; I am beginning to feel out of control |
| 8 | Severe | All of the above plus - tensing up or body aches | I am tearing up; I am trying to keep it together; I am feeling helpless; I can't remember what they told me |
| 9 | Severe | Sweaty palms; Nauseous | I am feeling needy and helpless; I fell like a child; I feel out of control |
| 10 | Severe | Heart racing, feel like fighting or running away, unable to listen and follow instructions, confused, irrational, or feel like you're going to have an anxiety attack | I feel panicky; I keep crying or tearing up; I feel no focus; I feel angry and short tempered; I am feeling ignored |

# Other Scales Tested

**5 Point Likert Anxiety Scale** 9%

1 – Not at all Anxious
2
3
4
5 – Very Anxious

5%

**5 Point Likert Nervousness Scale**

1 – Not at all Nervous
2
3
4
5 – Extremely Nervous

**5 Point Anchored Nervousness Scale** 26%

1 – Not at all Nervous
2 – Slightly Nervous
3 – Somewhat Nervous
4 – Very Nervous
5 – Extremely Nervous

# Top 5 Themes

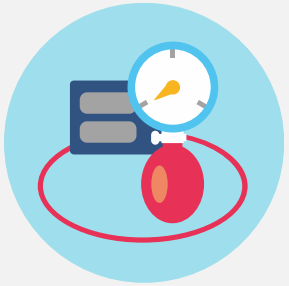


1. **Perception of outcomes and the unknown plays a role in increased stress**

   *"What's going to happen to me, what does my future look like?"*

   *"Is my cancer in remission or am I cured?"*

   *"What will they find…what will the results be?"*



2. **High Blood Pressure does not correlate with patient's emotion scores**



3. **The Physician's personality has a powerful effect on a patient's stress level both for outpatients and inpatients (i.e."How will he or she treat me?")**

   *"The Doctor was outgoing, answered my questions and explained things to me about dialysis and my options. That helped my anxiety go down a little."*

   *"I felt she did hear what I was saying, respected me and I felt very satisfied."*

# Top 5 Themes



**4. Lack of communication between clinical staff and patients cause stress**

*"[I was] surprised at the level of what they (the clinical team) didn't know. I'm a patient in the hospital, why haven't you made yourself familiar with my chart?"*

*"PT talking about going to extended care and doctor wanted me to walk so I can be discharged and home by Saturday."*



**5. Patients experienced stress over circumstances beyond their control (tube in throat, dizzy walking, complications after surgery, not healing, roommates)**

*"I had an extremely very rude roommate, so my stress level was extremely high."*

*"Tricky to find the balance of medication that will actually put it into control."*

# Emotions Research: Phase II

## What is Empathy?



# Objective of Research

Media Production team was charged with developing a video to teach empathy. In a third video in the Empathy series, the team hopes to more fully demonstrate what empathy is and what it is not with Concrete Examples.

- An online survey was distributed to all Cleveland Clinic Patient Panel members
- 1500 completes
- Results used in conjunction with Phase I Emotions Research.



Empathy = The ability to understand and share the feelings of another.

Source: Oxford Dictionary

Looks different for everyone!

# Key Findings

- Words used to describe empathy in a healthcare setting...
  - **Understanding**: *"Empathy is the experience of understanding another person's condition from their perspective."*
  - **Caring**: *"Empathy means caring with intelligence. More than 'feeling sorry', rather knowing that any person can have bad experiences."*
  - **Compassionate**: *"Empathy is having compassion for others and what they are going through in their lives."*
  - **Listening**: "*If I am empathetic, I am listening attentively and I am really interested in what you have to say. I offer you my encouragement and support in a meaningful manner*."
  - **Feeling**: *"Feeling the suffering of another, being in harmony with the feelings of another individual."*

**Tough Part: Getting Caregivers to Display Behaviors. Integrated into our Culture**

# Key Findings



- Patients want to be treated as a person, not a disease.
- The patient and the family member expect to be shown respect by all members of the healthcare team.
- Healthcare teams should be anticipating the needs of the patient and discussing these needs with the caregiver *and their family members/loved ones*.

# Key Findings

- Many patients were able to provide specific examples of empathy that various Cleveland Clinic employees have exhibited.
  - Nurse taking routine vitals
  - Lab Tech taking blood
  - Nurse/Assistant who sees you before the doctor does
  - Intern/Resident who sees you before the doctor does
  - The Doctor
  - Other healthcare workers









*Impact of small gestures*



# Revamped Caregiver Orientation

# Caregiver Training

# Cleveland Clinic Empathy Video

# Table Discussion



How does/can your organization bring more empathy to your work environment?

Employees towards:

- Other co-workers
- Customers

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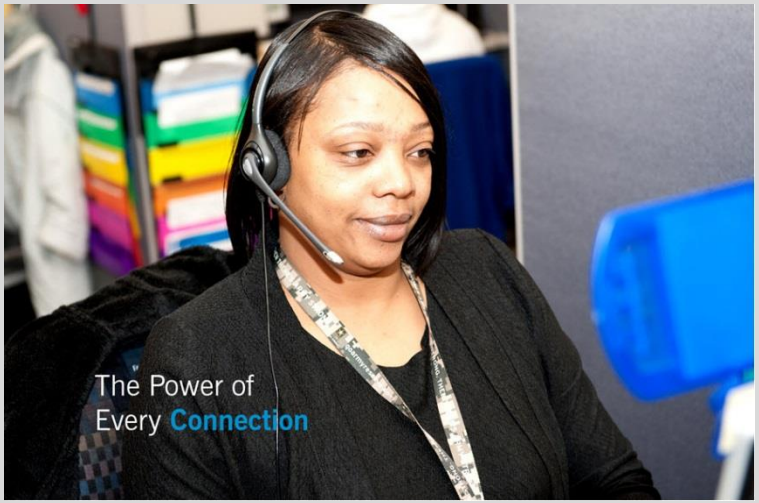
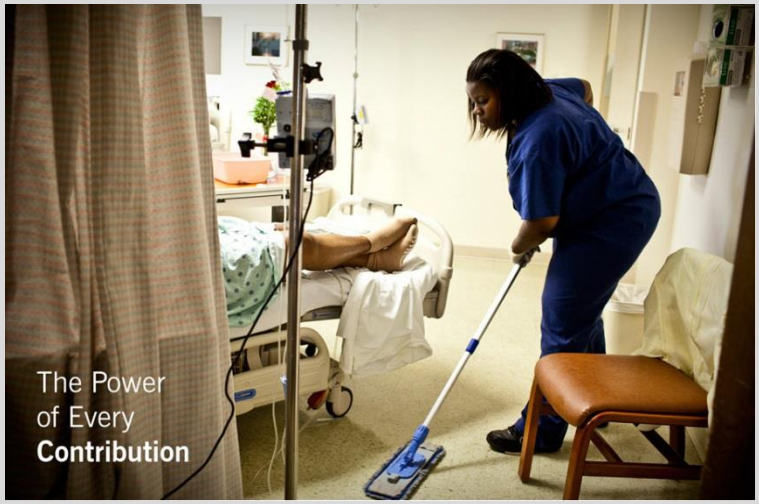
THE POWER OF EVERY ONE

CAREGIVER EXPERIENCE

# Interactive Experience

# The Power of Every One: Internal Brand Caregiver Experience









# The Power of Every One: Caregiver Experience

## Historical Quote

"The strength of the individual was the strength of the group"

-George W. Crile, MD

## Inspirational Copy

*Battle Cry*

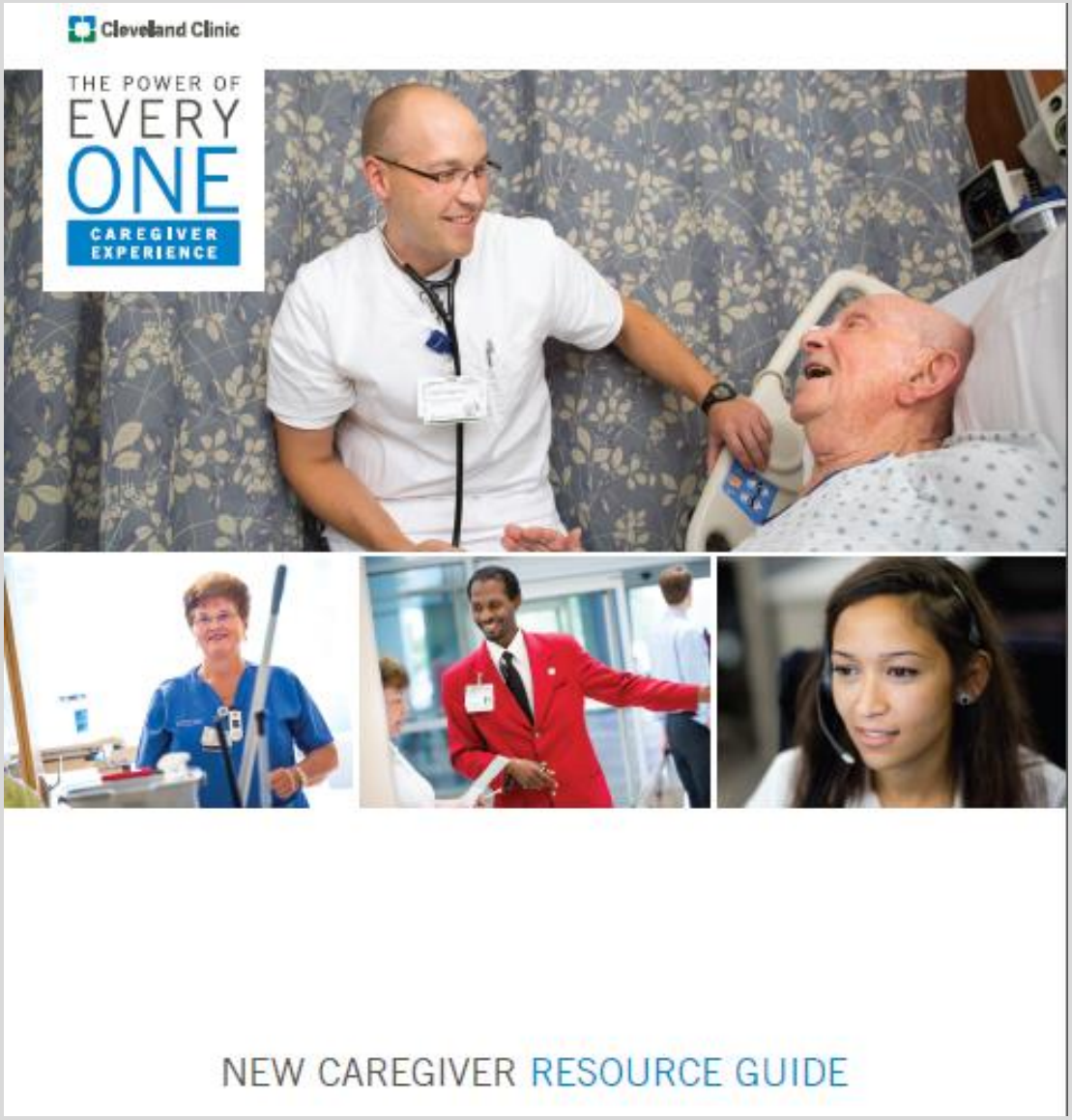
Everyone at Cleveland Clinic is a caregiver.
We all have the power.
The power to help.
The power to heal.
The power to change lives — beginning with our own.
That's the power of the group.
That's The Power of Every One.

# Caregiver Orientation Process

- Goals: Memorable, Worthwhile, Inspiring
- Patient Vignettes/Activities to pull out emotions
- 5,000 join our organization each year
- Went from 300 slides down to 50
- Two days down to one day
- More interactive – Poll Anywhere with iPads at each table
- Now have a separate pre-boarding process
- More in-depth table discussions



# Caregiver Orientation Process



# Partner Discussion

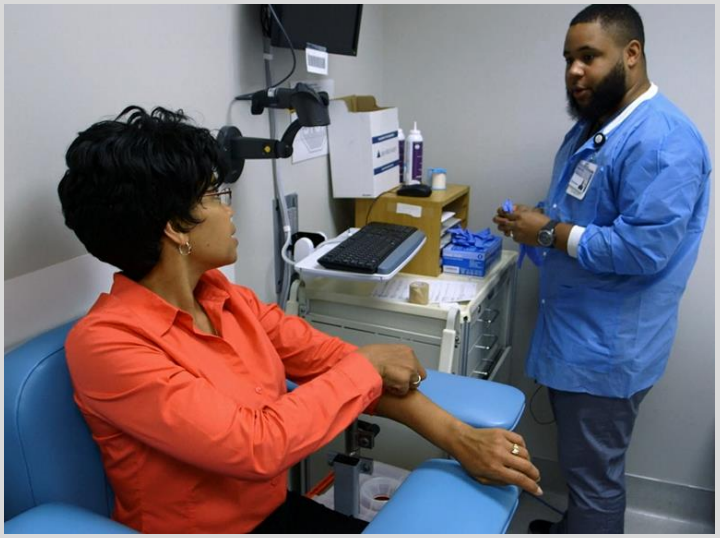


**Think about a time you or a loved one were a patient. What emotions did you feel during that experience?**

# Patient Vignettes

- Follow a family through their journey







# Rest of Organization

- Events to orient existing caregivers to the new culture…
  - Road show across the enterprise
  - Work with local HR Business Partners



# Caregiver Training

- Learnings from the emotions and empathy research are also being used with frontline caregiver training courses and practices.
  - Value Based Approach
  - Polls on Intranet
  - Training Videos



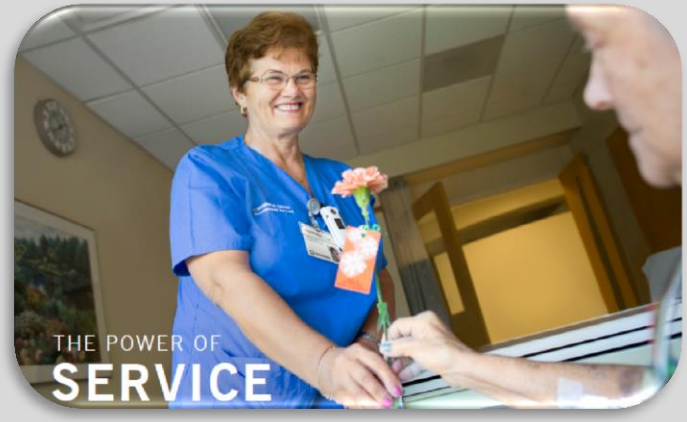

- Article “Debunking Common Myths about the Healthcare Consumers
  - Stated Importance: The Outcome received as most important
  - Derived Importance: Empathy & Support

# Guiding Principles



















TASK TO TOUCH
Emotional Intelligence
• Know Yourself to eliminate "That's not me!" barrier
• Teach staff that their behavior is a big part of the solution
Patient Provider Partnership
• Intentionally and consistently building relationships
• How do I show I care?
Patient Perception
• Learn how to neutralize negative perceptions
• Generate positive impressions through word of mouth and social media

# Physician Training
# The R.E.D.E.℠ Model of Healthcare Communication

**R** ***elationship:***

Convey value & respect with welcome
Set agenda collaboratively
Demonstrate empathy using S.A.V.E.
**S**upport-**A**cknowledge-**V**alidate-**E**motion Naming

**E** **stablishment**

Listen reflectively
Elicit patient narrative of HPI
Explore patient perspective using V.I.E.W.
**V**ital Activities-**I**deas-**E**xpectations-**W**orries

**D** **evelopment**

Share diagnosis/information
Collaboratively develop plan
Provide closure
Dialogue throughout A.R.I.A.
**A**ssess, **R**eflect, **I**nform, **A**ssess

**E** **ngagement**

***5800 Participated***

S.T.A.R.T.
with Heart




Respond
with H.E.A.R.T.

Answer
with H.E.A.R.T.

**Creating a Culture of Compassionate Communication**

**It starts with your employees**

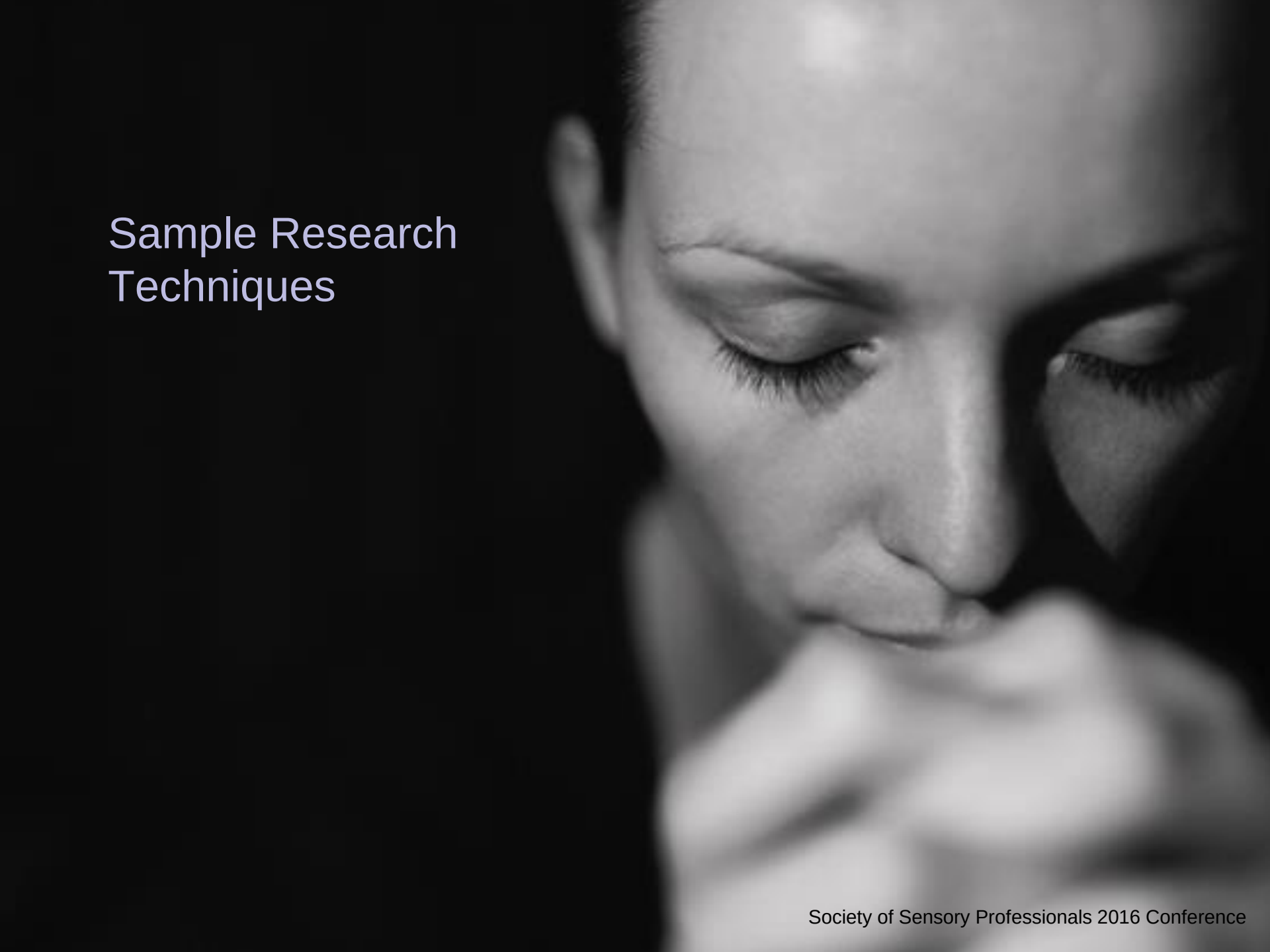
## S.T.A.R.T. with Heart ® Expected Service Behaviors

- **Smile and greet warmly**
- **Tell your name, role and what to expect**
- **Active listening and assist**
- **Rapport and relationship building**
- **Thank the person**

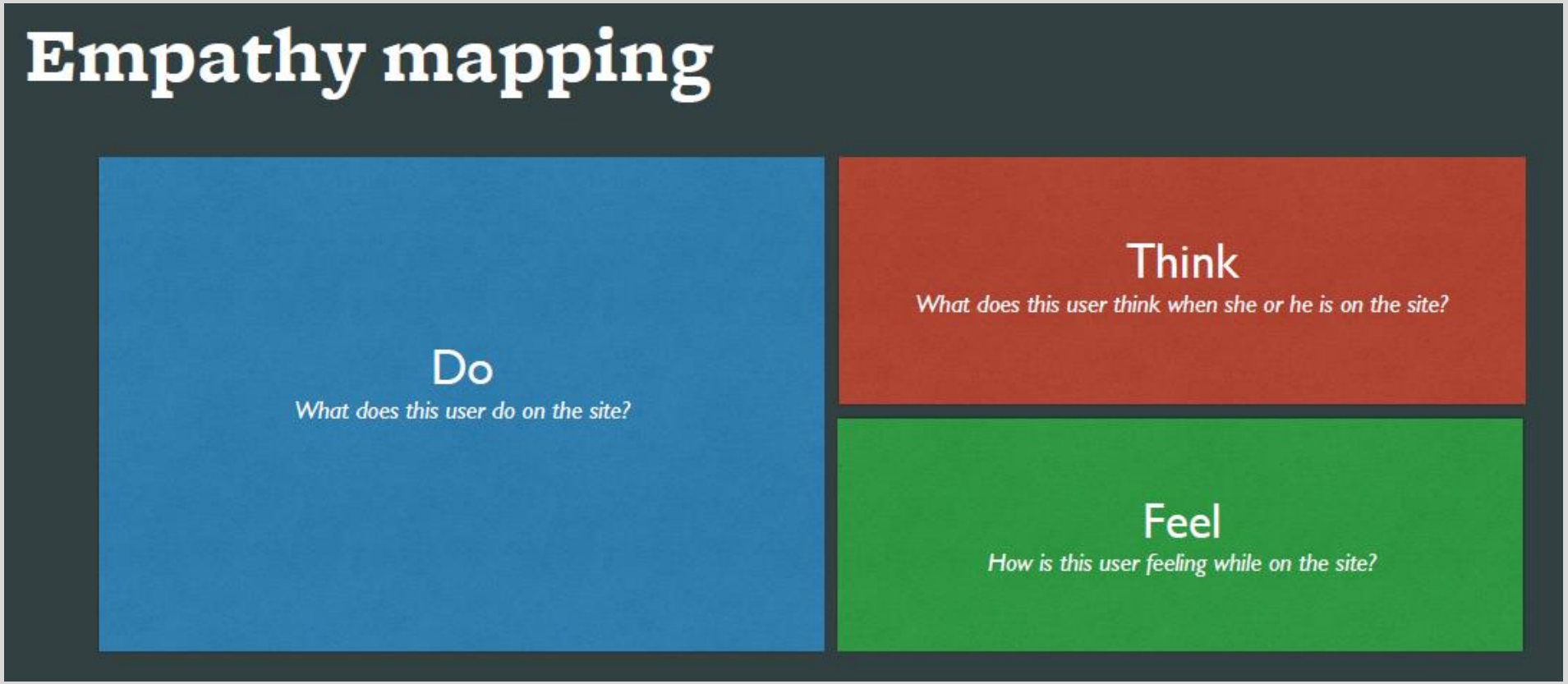
Caregiver Fatigue

What programs or services does your company have for your employee's?

# Sample Research Techniques



# Qualitative Emotions Tools



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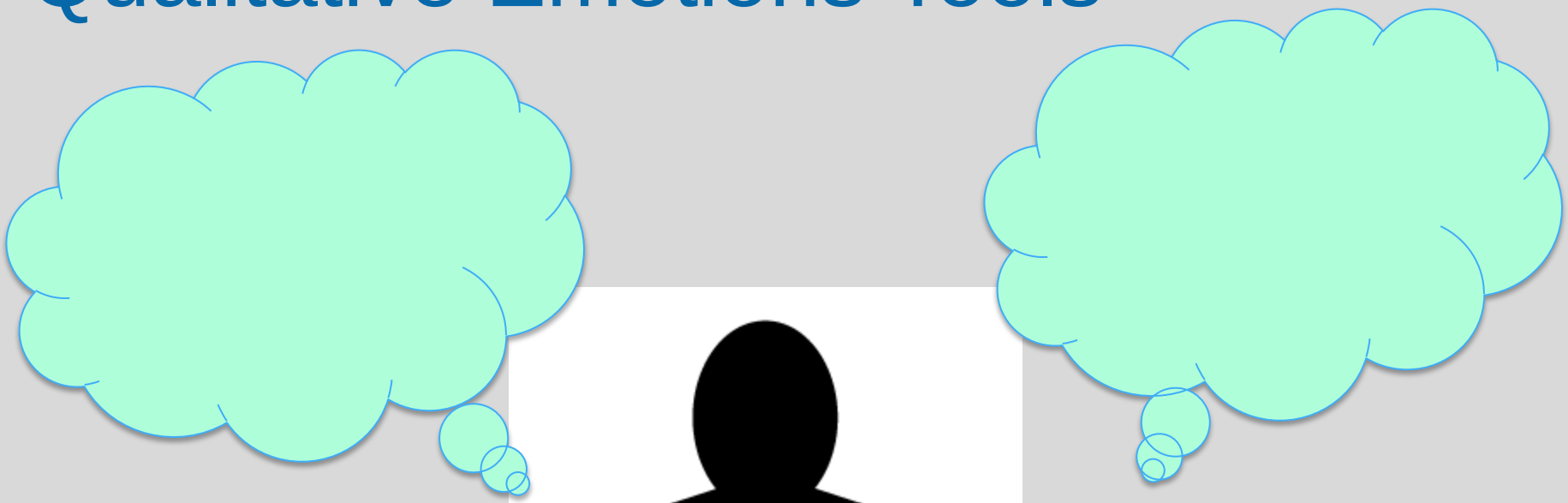

*What I would say…*

*What I would be thinking…*



*What I would be feeling…*

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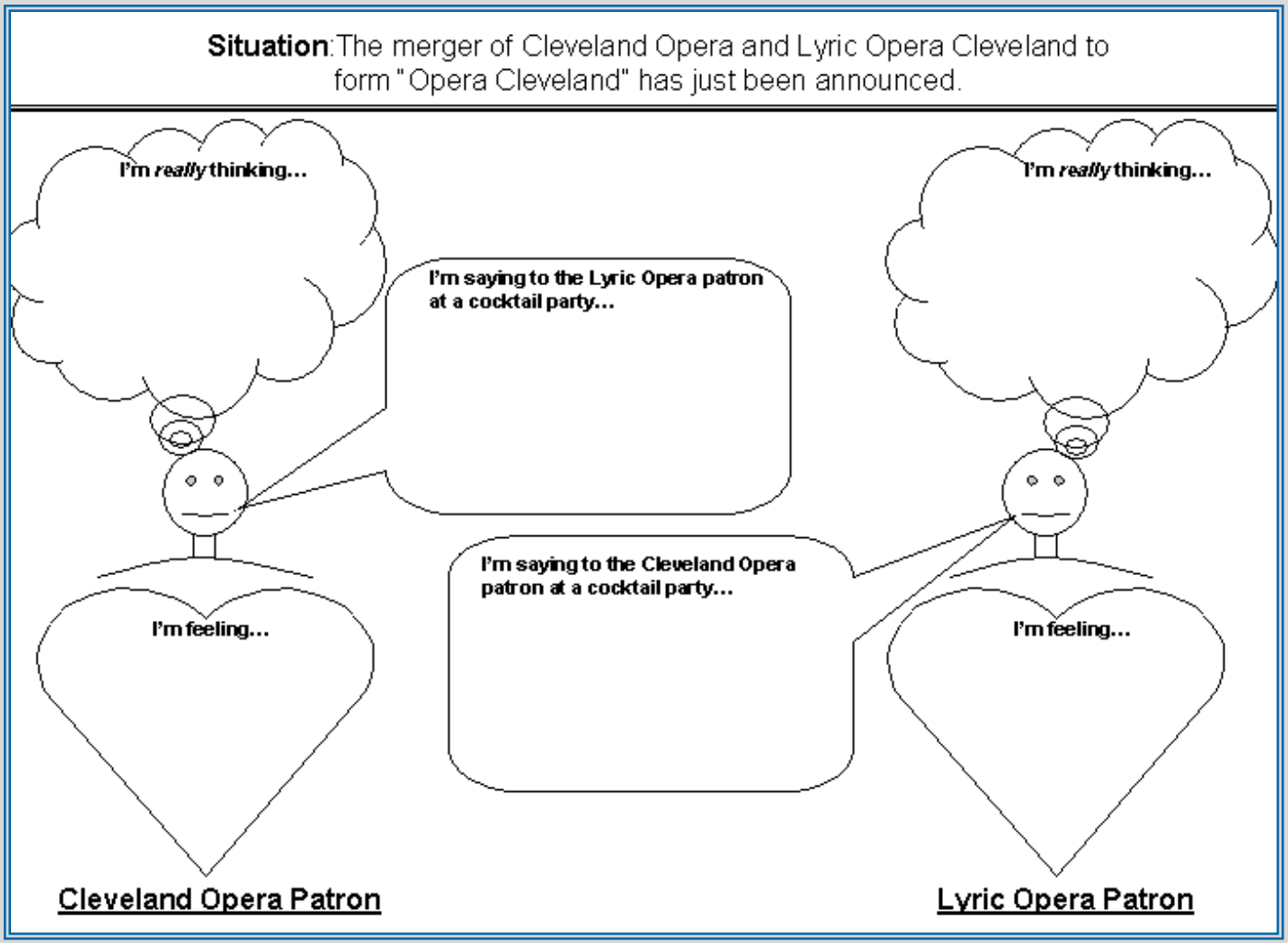
# Qualitative Emotions Tools: Word Bubble / Role Playing

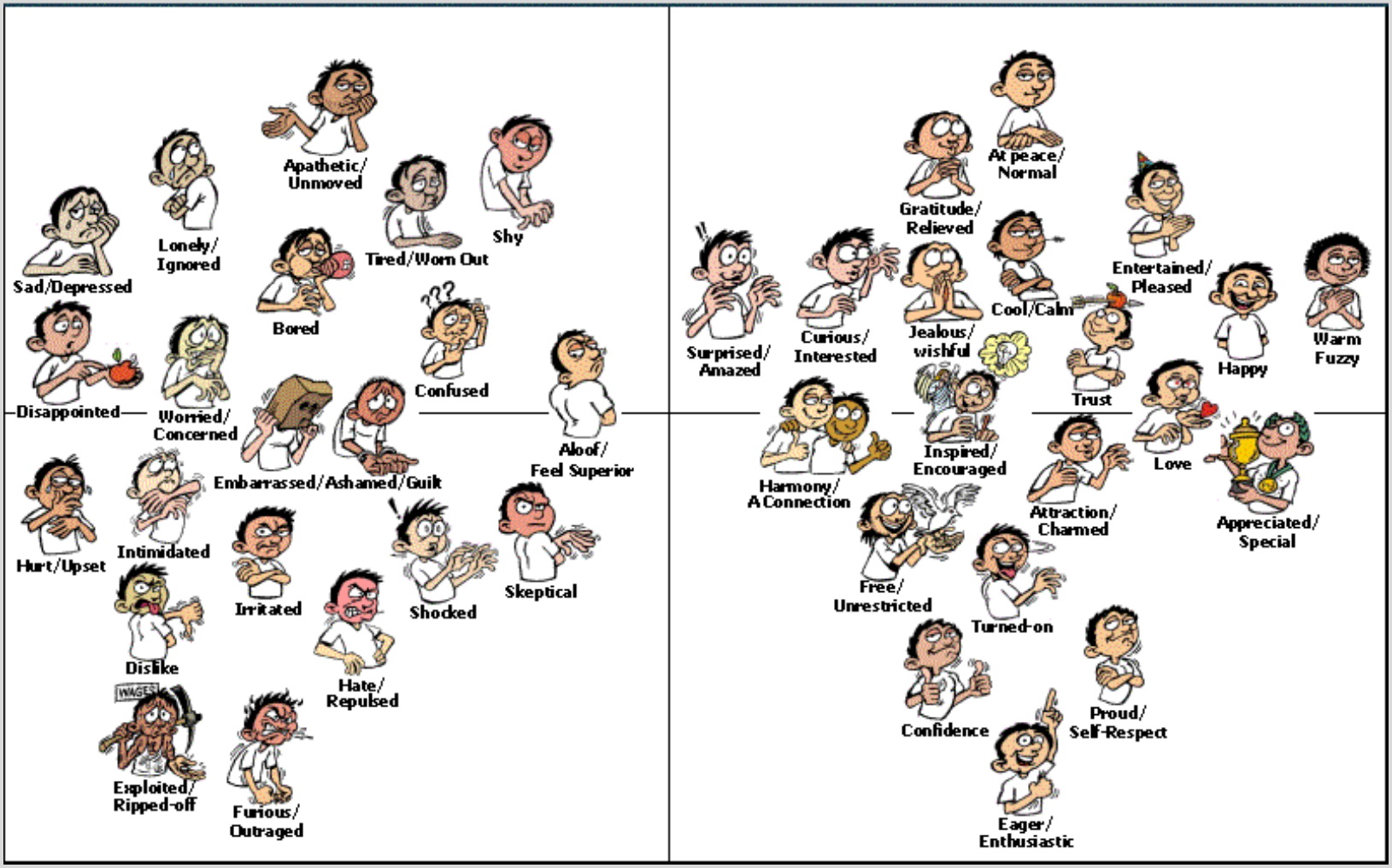




Source: Moderating to the Max

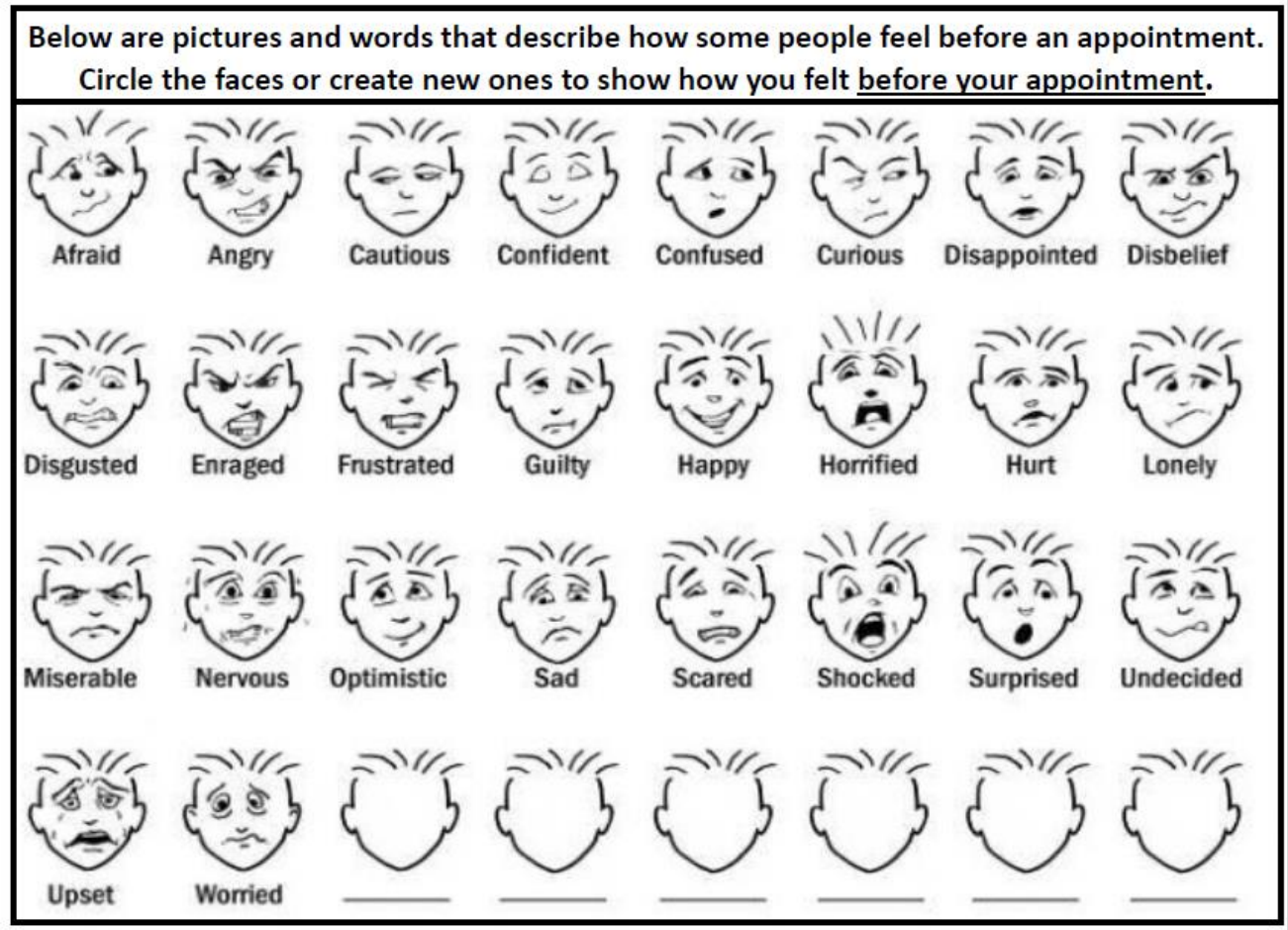
# Qualitative Emotions Tools: Emoji Exercise

- X Makes Me Feel…



# Qualitative Emotions Tools: Emotional Images Exercise

- X Makes Me Feel…



# Qualitative Emotions Tools: Imagery Collage

- X Makes Me Feel…

| Image Description | How it reminds you of your… emotions as a patient or your overall ER experience |
|---|---|
| | |
| | |
| | |
| | |

# Emotional Implications of an ED Visit

Participants were asked to exemplify the emotions they felt as an ED patient through a collage exercise. Common emotional themes and the corresponding pictures are shown below.

## Positive Associations

## Negative Associations

***"The doctor listened to me when I explained what my symptoms were."***



***"Hoping they hear what you are telling them. When you know what's wrong…they need to hear."***

***"They were hearing, but they weren't listening."***

***"The wait time and the overall time was so fast."***

***"Overjoyed with the amount of time it took to assess the problem and discharge me."***



***"Always wondering how long you are going to spend in the waiting room."***

***"The time that's required to wait before you are seen."***

***"They gave me a painkiller and an antibiotic to ease the pain…extinguished the pain."***





***"They already got their mind made up on how they're going to treat you…based on what you told the nurse."***

# Mock Focus Group Exercise: Brand Analogies

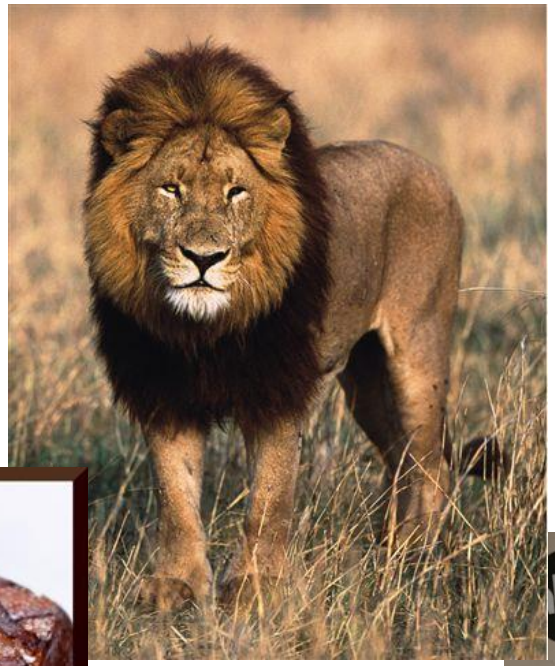
| Cleveland Clinic | | |
|---|---|---|
| If Cleveland Clinic was a _____, what would it be? | | Reason |
| Animal | | |
| Food | | |
| Celebrity | | |

| Local Community Hospital | | |
|---|---|---|
| If X was a _____, what would it be? | | Reason |
| Animal | | |
| Food | | |
| Celebrity | | |

# Cleveland Clinic Personified

Powerful, Influential



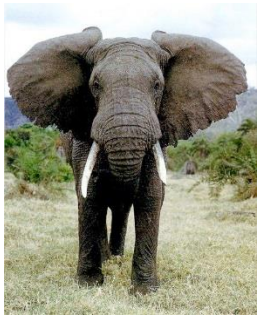


Courageous, Leader, King, Impressive

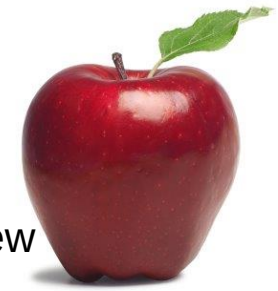
Top Quality, The Best



Large



Shiny and New





Great Reputation, Smart, Top in Field

# University Hospital (UH) Personified

Respected, Great Reputation
But Second in Line



Not Popular, Don't Know
Much About Them



(Lima Beans)

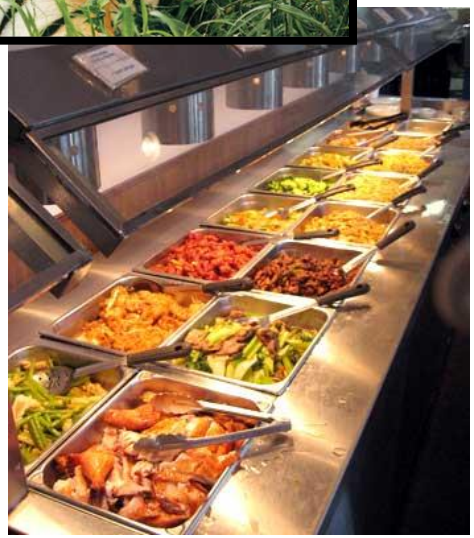


Young, Hip, Second
Place in Their Field



Smart, Capable of
Many Things

Comprehensive,
Many Services
Available



# Medina General Personified

Bland, Simple, Convenient





Friendly, Wanting to Please

Inconsistent, Lacking Substance



Small





Motherly, Caring



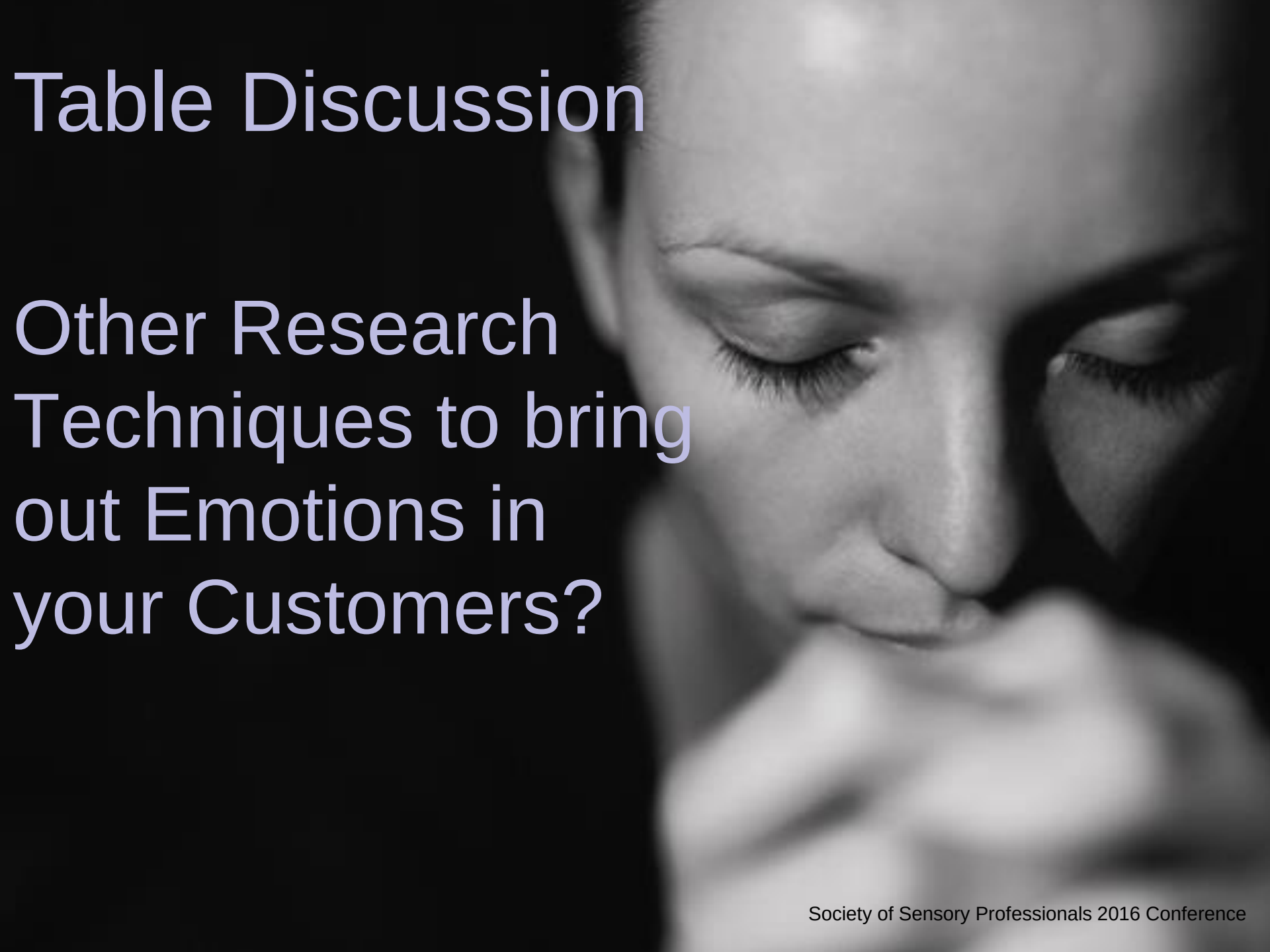
Local, Down-Home

Comfortable, Good But Can’t Do It All



# Table Discussion

Other Research Techniques to bring out Emotions in your Customers?



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# Patient Panel

- 5,000 Patients
- Represents patients across Northeast Ohio and the US
- Patients from Main Campus, Community Hospitals, and Family Health Centers
- Wide range of patients with different conditions

Gauge experience, perceptions and test new concepts.

2013 INSIGHT COMMUNITY OF THE YEAR

Healthcare Insight Partnership



Cleveland Clinic

# Physician Panel

- 400+ Physicians
- Cleveland Clinic staff employed physicians across the entire enterprise.
- Physicians included  are a representative mix of locations, physician role, specialties, institutes, gender, age, tenure.
- Studies: Epic Communication Effectiveness, Functional Medicine Formulary, My Practice Imaging, Physician Referral Patterns
- Help us recruit more physicians!

Test awareness, experience & preference

I joined the Physician Panel because I have a desire to contribute to a process that will hopefully drive positive change.

The Physician Panel is an easy and efficient way to have my opinions heard

# Cleveland Clinic Caregiver Panel

- 5,500+ Employees
- Employees from across the enterprise, including Main Campus, Community Hospitals, and Family Health Centers
- Diverse mix of occupations including nurses, administrative positions, etc.

Test awareness, volume and caregiver communication efforts

I wanted to join the Caregiver Panel as another way of being a valuable part of the Cleveland Clinic community. I wanted to be a voice of the employees here and give my feedback to help make the Cleveland Clinic even better than it already is!

I like having a voice. I feel like I can personally make a difference.

# Table Discussion

Sample “ground rules” for backroom clients during focus groups & IDIs to promote empathetic listening?

- Activities / Tasks
- Debrief Session
- Listen Between Themes
- Not Sound Proof
- Getting around Stereotypes?



# Backroom Take-Aways:



- Activities / Tasks
- Debrief Session
- Listen Between Themes
- Not Sound Proof
- Replace respondent with Mother, Neighbor, Brother
- Screening Process
- Perceptions = Reality
- Mock group with clients
- Don’t LIVE the Brand
- Unconditional Positive Regard
- Privilege Letting us “into their lives”


Questions?



Cleveland Clinic

Every life deserves world class care.

# Market Research Mission



**Market Research provides leadership in gathering, identifying and understanding both internal and external information and acts as an agent for applying knowledge in support of the decision making process.**

# Who are our clients?

- Marketing Account Services
- Advertising/Sports & Events
- Employee Communications
- Digital Marketing
- Office of Patient Experience
- Arts & Medicine
- Philanthropy
- Operations
- Wellness
- ITD / eCleveland Clinic
- Human Resources
- OPSA

- Market & Network Services
- Referring Physician Center
- Patient Facilitated Services (VIP)
- Lou Ruvo Brain Center
- CC Canada
- CC Florida
- Community Hospitals
- Family Health Centers
- Executive Administration
- Various Institutes
- And more!!!

# Market Research Capabilities

## Methodologies Utilized:






- Focus Groups (Dyads, Triads)
- One-on-One In-Depth Interviews
- Usability Interviews
- Ethnographic Research
- Internet / Intranet Surveys
- On-Site Intercept Interviews
- Mystery Shopping
- Panel Research (Patient Panel, Caregiver Panel, Targeted Panels – Physicians, Stakeholders, Ailments)
- Online Discussion Panels / Online Focus Groups
- Self-Administered Mail Surveys
- Telephone Interviews

# Market Research Capabilities

## Sample Types of Studies Conducted:

- Image & Awareness
- Positioning & Branding
- Competitor Impact Studies
- Advertising / Collateral Testing
- Internet / Intranet Site Testing
- Patient Experience & Service Enhancement
- Construction Design Research
- Employee Engagement & Satisfaction
- Physician Satisfaction
- Referring Physician Experience
- New Concept Testing

**Target Audience**: Patients, Employees, General Consumers, Physicians/Nurses, Stakeholders