

How to Get More from Your Quality Improvement Efforts (Survey)Monkey See, (Survey)Monkey Do

Chris L. Grimes, BS

**Director of Quality Assurance and Internal Training
Indiana State Department of Health Laboratories**

Member, APHL Laboratory Systems & Standards Committee

March 2017

What motivated us?

- We had not seen, heard, or been told what our customers thought about our services



- We had a new Lab Director starting in 2008 who wanted to know what our customers thought

What if you need buy-in?

- We had automatic buy-in from our new Lab Director
- How could you persuade lab management?
 - Metrics and comments are valuable to show to upper management
 - Metrics show how your efforts relate to direct improvement of customer satisfaction
 - Results help focus efforts where they make the largest impact to customers
 - Surveys provide compliance with ISO/IEC 17025, section 4.7 requirements

Surveys Provide Valuable Data:

- They help us to answer the ongoing question: “How can we do a better job?”
- Survey results can provide information to help us improve quality through the DMAIC model:
 - 1) **Define** – survey results can help define a problem
 - 2) **Measure** – survey results can provide data to better understand the problem
 - 3) **Analyze, Improve, and Control** – surveys allow us to study the results and follow up on them

What were our options?



- SharePoint has a survey template
 - Would require an outward facing site
 - Would be entirely maintained by state employees
 - May not seem as anonymous as a third party site
- SurveyMonkey®
 - Already used by the Lab Outreach team
 - Required no maintenance
 - Surveys could be set up as anonymous
 - Must be paid for annually, but is normally covered by preparedness funds (Gold membership = \$300/year)

How did we start using SurveyMonkey® for QI?

- Only one small customer survey – Water Lab Certification
- Set contact list of just under 100 customer labs
- Thirty nine respondents
- One question with built-in question logic
- Each portion only had 8 questions
- Some rating questions

What else did we do with SurveyMonkey®?

- Customer Satisfaction-2008, 2011, 2012, 2013, 2015, 2017
- Employee Morale – 2013, 2016
- Management Review – 2016, 2017
- Knowledge Retention Toolkit – starting 2017
- Employee Exit – starting 2017

Customer Satisfaction Surveys



Customer Satisfaction



- Quality is giving the customer what they want when they want it
- The customer determines the value of your product or services
- Customers can be external or internal to your organization, so be sure to survey both types

Customer Satisfaction Surveys

- We surveyed **ALL** customers who had provided email addresses
- We surveyed a wide array of customers:
 - 1) Private citizens who submitted water samples
 - 2) Local Health Departments
 - 3) Clinics, hospitals, MD/DVM offices
 - 4) Other Labs
 - 5) Other state partners (e.g. Environmental Management, Board of Animal Health, Corrections)
 - 6) ISDH Programs (e.g. Epi, HIV/STD)

Customer Satisfaction Surveys

- Originally, we crafted 8 different surveys for our various services, but have narrowed it to just five:
 - 1) **Lab outreach program**
 - 2) **Water lab certification program**
 - 3) **Small System Lab Assistance Program (SSLAP)**
 - 4) **Municipal Water Supplies (MWS)**
 - 5) **Clinical, Rabies, Food, Environmental Lead, and Environmental Chemistry**

Customer Satisfaction Surveys

- Lab testing surveys have up to 8 question categories:
 - 1) Container ordering
 - 2) Facility use/central receiving
 - 3) Sample submissions
 - 4) LIMS submissions
 - 5) Result reporting
 - 6) LIMS reporting
 - 7) Interactions with lab staff/management
 - 8) ISDH Laboratories' website

Customer Satisfaction Surveys

- Remember, question structure and wording is important
- Make initial questions optional and allow respondents to self identify
- Set up 'Rating Scale' questions for numerical comparisons
- For rating questions, assign the highest value to the most positive rating

Customer Satisfaction Surveys

- Require responses wherever possible – we increased these as we have progressed
- Allow customers to explain their ratings
- Provide free text response spaces on each page, if possible
- Allow customers room to suggest areas for improvement
- Build in question logic that allows for more targeted questions – e.g. only LimsNet users answer those items

Customer Satisfaction Surveys

- Improve survey each time, but try to keep as many questions the same, so you can compare results directly
- Manage and address all of the bounce back emails from defunct customer email accounts
- Experiment with extracting the data in various graph formats – allows for proper question structure
- Extract all comments into spreadsheets for review
- Present overall survey results to all employees, if possible

Another Customer Survey example

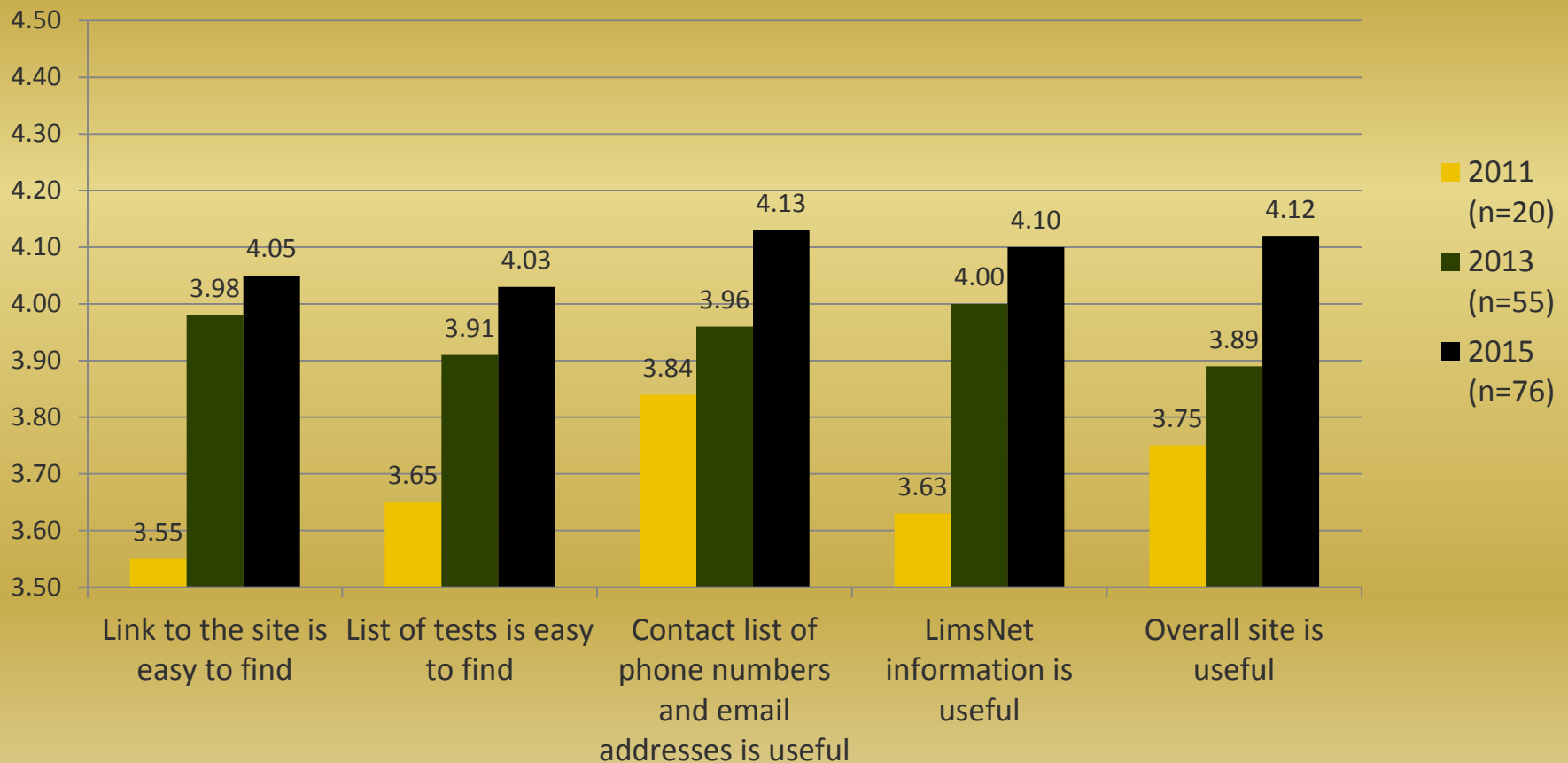
15. During the on-site inspection, please rate the Certification Officer's performance on the following:

	Excellent	Good	Average	Fair	Poor	N/A	Rating Average	Rating Count
Reviewing your lab's available documents and records	83.3% (15)	11.1% (2)	0.0% (0)	0.0% (0)	0.0% (0)	5.6% (1)	4.88	18
Interviewing the lab personnel	77.8% (14)	16.7% (3)	0.0% (0)	0.0% (0)	0.0% (0)	5.6% (1)	4.82	18
Conducting the closing review	77.8% (14)	16.7% (3)	0.0% (0)	0.0% (0)	0.0% (0)	5.6% (1)	4.82	18
Overall professionalism of the Certification Officer	77.8% (14)	16.7% (3)	0.0% (0)	0.0% (0)	0.0% (0)	5.6% (1)	4.82	18
							answered question	18
							skipped question	6

Survey Question Examples

- Please rate the following statements in terms of your satisfaction:
 - 1) Personnel are professional and courteous
 - 2) Personnel are knowledgeable and can answer questions and concerns
 - 3) Submission forms/instructions are easy to understand
 - 4) Reports are clear and concise
 - 5) Critical results are reported in a timely fashion
 - 6) Reports meet your regulatory needs

Please rate the following in terms of your satisfaction with the ISDH Laboratories website:



Water Testing Responses

Responses			
	2011	2013	2015
Municipal Water Supplies (MWS)	21 (17.8%)	30 (25.4%)	26 (22.0%)
Small System Lab Assistance Program (SSLAP)	37 (10.1%)	84 (21.7%)	76 (18.2%)

General/Clinical Responses

2011	2013	2015
95/559 Respondents	188/989 Respondents	266/1773 Respondents
17%	19%	15%

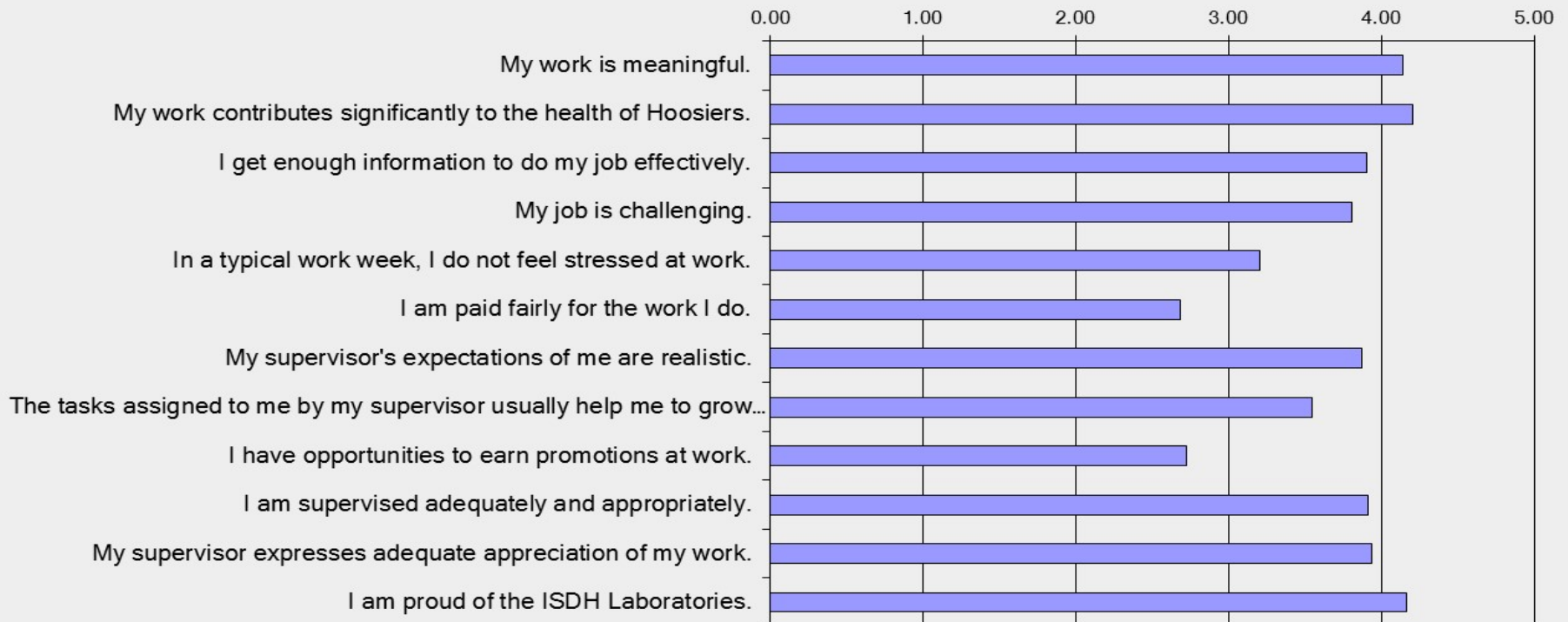
Employee Morale Surveys



Employee Morale Surveys – what we did

- Started with basic multiple choice structure for most questions
- Moved to the matrix/ranking scale question structure where possible
- Focused on management and communication
- Tried to allow for anonymity as much as possible, while still gathering worthwhile data (lab area and years of service are the only possible identifiers)
- Required responses to only a few questions

Employee Morale Surveys – Ex.



Employee Morale Surveys

- Example questions

- Why do you continue to work here?
- How likely are you to look for another job outside the ISDH lab within the next 12 months?
- How long have you worked here?
- In which lab area do you work?
- If you could change one thing here, what would it be?

Employee Morale Surveys – What we did afterwards

- Presented overall survey results to all employees
- Tracked specific improvement suggestions and what management did to address them
- Presented suggestions and the attempts to address them at an all labs meeting

Management Review Feedback



Management Reviews

- ISO 17025 requires annual management review
- Must include review of all components of the Quality Management System (QMS)
- We started with Microsoft Word version with a table covering all overall QMS components

Management Reviews

- Initially, we received very little feedback from our management team (2 out of 20)
- Switched to SurveyMonkey[®] with much better response (12 out of 20!)



- Each topic had rating scales and open comments

Management Reviews

- Example questions
 - What new LIMS development projects do you wish to start within the next year?
 - What new methods would you like to add in the next year?
 - What new equipment does your lab need?
 - What reports do you provide to management? How useful are they? How much effort is required for reporting?
 - What suggestions do you have for improving reports?

Management Reviews

- Example questions
 - What major findings were reported from internal audits?
 - What changes would you suggest for our internal audit process?
 - What findings were reported from external assessments this year?
 - What new tests have customers suggested for us to start within this past year?
 - During the past year, what issues have you had with any particular vendor?

Management Reviews

- Example questions
 - What suggestions do you have to improve the ordering/purchasing process?
 - What suggestions do you have to improve the hiring process?
 - What suggestions do you have to improve our onboarding process?
 - What suggestions do you have for retaining employees?
 - What suggestions do you have to improve knowledge retention even when employees leave?

Knowledge Retention Toolkit



Knowledge Retention

- APHL Knowledge Retention Toolkit
 - MS Word and Excel versions are available on the APHL.org website
 - Our initial experience with Management Review as a Word document led us to consider SurveyMonkey®
 - Difficult to convert entire toolkit to the survey format
- SurveyMonkey® allows upload of certain file types - PDF, DOC, DOCX, PNG, JPG, JPEG, GIF

Knowledge Retention

- Will allow us to compare results across employees, so we can identify trends
- Plan to have people in vital positions complete this survey initially
- Will have to update the information on a periodic basis
- Must develop process for extracting, retaining, and communicating position data

Employee Exit Survey



Employee Exit Interview

- Adapted from APHL's Knowledge Retention Toolkit
- Allows us to gather this data in a more systematic, objective manner
- Should elicit better responses than just having HR conducting in-person exit interviews
- Allows lab management to track any trends and take steps when possible, to prevent more exits
- Decide how much anonymity is to be built into this survey

Employee Exit Interview

- Example questions:
 - What is the primary reason you are leaving?
 - What did you like about this position?
 - What did you dislike about this position?
 - What are the critical skill sets needed in this position?
 - What can our organization do in the future to avoid losing a valuable person such as you?
 - What recommendations do you have for any responsibilities that should be evaluated or changed with this position?

Now, you can sit back and
enjoy, right?



Not quite!! What's next?

- Present information to impacted parties
 - Customer survey results to employees
 - Morale survey results to employees
 - Management Review results to management team
 - Knowledge Retention results to management team and new employees in those specific positions
 - Employee exit survey results to management team
- Track changes made and report on progress

Questions?



Feel free to contact me

Chris Grimes

(317) 921-5805

cgrimes@isdh.in.gov