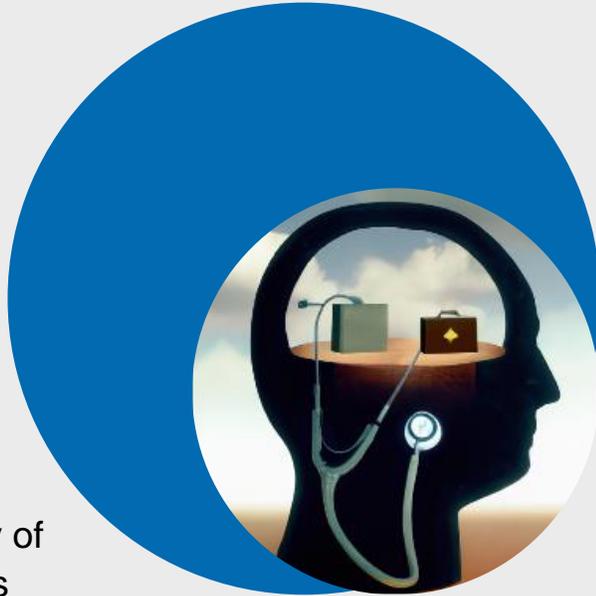


“Where We’re Headed”

CX LEADERS PERSPECTIVES

The Current and Future Trajectory of Experience at Healthcare Systems



The healthcare industry is going through a period of significant change, trying to adapt to and keep pace with increasing and expanding consumer expectations. To better understand how healthcare system CX functions are responding, we spoke with experience leaders within 8 healthcare systems (and also included 2 non-healthcare organizations as points of comparison). These 8 systems collectively deliver over 45 million patient encounters per year. Our goal was to better understand the dynamics they face today and the visions they have for the future.

What we learned is that healthcare experience leaders are valiantly trying to improve the experience for all of us – they are true champions of the healthcare consumer. They are making progress, but they face headwinds less common to other industries. CX organizational and functional structures are in motion, leadership support varies, and strategic intent can be unclear. In the face of this, they make critical improvements to frustrating breakages and do not lose their optimism for positive change.

This study provides a sense of their world.

EXECUTIVE SUMMARY

- Healthcare systems have similar functional footprints for experience, but models are works in progress.
- Experience leaders are adept influencers who bring the consumer perspective to life and work through ambiguity.
- They are fixing longstanding breakages while simultaneously preparing for transformation.
- Emerging lessons from the crises may provide significant tailwinds for CX leader efforts.
- C-suite leadership and strategic enterprise intentionality will be critical to transformational success.

THE EXPERIENCE FOOTPRINT

The purview of CX leaders and the territory covered by CX functions are important factors in the ability to adapt to consumer expectations. CX leaders identified common experience capabilities across the systems they represent, whether those are focused on patients / consumers or employees. These capabilities generally center on 5 key functional areas:

1. DATA AND INSIGHT

Collecting, discerning, and reporting critical signals to inform organizational experience strategies and tactics. "We built the right mechanics to understand what customers are doing, what they're experiencing ... real-time."

2. CONSULTATIVE GUIDANCE

Advising organizational teams on the implementation / operationalization of experience improvements. "The whole idea is to help people find out what the key drivers are, have the team decide what they want to work on, and then measure it every day."

3. TRAINING, EDUCATION, AND COACHING

Helping the frontline and organizational executives to better understand the importance of experience, their role, and enabling their participation.

4. RECOGNITION

Building a culture of experience by acknowledging and providing positive reinforcement. A handwritten note of appreciation from a leader, a celebration of a staff member of the month, or sharing a weekly staff story, for instance.

5. RELATIONSHIP MANAGEMENT

Overseeing some degree of centralized service support and recovery function. At scale, they nurture patient engagement and relationships by providing assistance and resolving grievances.

Despite having shared capabilities, there is no common "best practice" model for how experience is structured within healthcare organizations. Unlike other industries, "There's not the single throat to choke. There's no one that wakes up every day thinking 'if we don't figure this out...'" They are unique models driven primarily by considerations of balancing system vs local needs and the reality of diverse functional engagement required for experience work. Models are works in progress with systems evolving roles, responsibilities, and shared leadership for experience efforts.

TODAY'S EXPERIENCE LEADERS

They are adept influencers. They successfully navigate structural ambiguity and often conflicting ownership to coalesce a willing group of stakeholders. They harness diverse data sets to help support "a lot of 'what's in it for me' kind of work. And people get it. They understand it." They provide the necessary clarity and a new common language for the work. Finally, they are prepared to work through conflict and gain the collective win. These are critical skills of experience leaders.

They bring voice to the data. They are not only vocal advocates for and adept at isolating insight, they seek to humanize the numbers. The qualitative nature of data allows them to infuse the human, the emotional layer that helps to compel action. They bring the consumer into the conversation literally, with such efforts as co design and co creation, as well as figuratively through tools such as personas and journey mapping. They are a cultural voice and conscience for the consumer in an evidence-based industry.

They are culture builders. Experience leaders are ultimately dependent on cultural alignment in order to achieve success. It starts with believers at the front line who are empowered to deliver great experience. "If our people don't believe in what we are doing, they're never going to be able to deliver a good experience for our customers." But if the C-suite doesn't also provide the necessary "aircover", experience efforts are relegated to incrementalism. "That's really critical, the language needs to start from the top and just permeate everything we do." Most experience leaders desired more intentional and vocal engagement from their CEO and senior-most executives.

AREAS OF FOCUS

Leaders work to 1) fix today's intransigent experience problems while 2) envisioning and laying the groundwork for future transformation.

1. THE HERE AND NOW

We heard a great deal of similarity across healthcare systems in terms of current experience priorities. Most of the work of the experience function is focused on two common areas – improving patient system access (to drive growth) and workforce support. These areas are inextricably linked as health systems struggle to meet not only the 'front end' modern consumer expectations of connection and engagement, but also the 'back end' issues of capacities to provide healthcare. Leaders acknowledge that access is "a tough one right now because, from a staffing perspective, everybody's so strained that sometimes we don't want more patients".

Longstanding, well known access breakages have bedeviled system experience leaders. They readily acknowledge frustration yet maintain laser-focus on helping their organizations fix 'access' breakages. The operational wiring is daunting and requires sustained enterprise intentionality, but momentum is underway given a range of push / pull market factors.

2. THE FUTURE

Looking forward, past the challenges of crisis recovery, experience leaders have their eyes set on customer driven transformation. For many, it's a space for improving "customer convenience" – fixing points of friction in the current service experience and creating more holistic journeys that create connection and engagement with consumers in new innovative ways. Experience leaders see the world of individualized care experience as real and necessary for their organizations to attain. They spoke primarily of the various modalities that consumer patients would want to use to engage in their healthcare encounters. They will help their organizations better understand and connect with healthcare consumers of the future. In doing so, they recognize and will help to balance the role of technology with the desire for human connection.

Experience leaders seek to balance their efforts, delivering critical fixes while being vocal champions and advocates for a consumer driven healthcare future.

LESSONS FROM THE CRISES

Our sense is that leaders are still collecting and reflecting on the lessons from the pandemic. They saw and helped their organizations respond in unique ways, but much of it was "forced" by the circumstances. The question as to whether systems harness these learnings remains to be seen.

But what leaders saw gives them encouragement and perhaps a cultural touchpoint for them to draw upon institutional memories necessary for experience transformation. They saw their organizations respond with speed and focus, galvanized by system intentionality. They saw their organizations succeed in ways they hadn't before. Initiatives launched in near real time. Experience agendas advanced. Innovations fast-tracked.

All also spoke of the negative repercussions of COVID, primarily around staff burnout. As one leader expressed "We got through it. But in the wake of that is this horrible staffing problem." And they were particularly cognizant of the role the patient consumer played in exacerbating those staffing problems. They are hopeful "we've hit bottom."

KEY DIFFERENCES OUTSIDE HEALTHCARE

Looking across industries, one will see many similarities in experience efforts. Functionally they will be delivering common areas of value for their organizations. Listening to customer signals, create connections across consumer journeys, engaging staff in the day-to-day work of experience. In this focused study, we looked deeper at two organizations for comparative insight – Delta Air Lines and General Motors. What we found, generally, was a difference in strategic intent and leader engagement in experience. These organizations' CEOs will share a fundamentally different perspective on experience. As Ed Bastian at Delta often says, "We are an experience company that is in the business of transportation." The orientation is not experience as a function, but experience as core to the mission of the organization. It manifests in a higher level of strategic intentionality for experience and organizational engagement that serves to differentiate their offerings and their brands in the marketplace. It's not something that is as common in healthcare, though it could be.

CLOSING THOUGHTS

We're living in a moment of truth for healthcare experience. As systems slowly emerge from the pandemic aftermath, how will healthcare differ for us? Will its "near-death" cause long awaited consumer experience-driven transformation or will we experience healthcare much the same way we did before the crisis?

METHODOLOGY

- Data was collected through 60-minute interviews with CX leaders conducted in Q4 2022.
- It provides a top line landscape perspective that anchors deeper areas of study.
- For additional detail, related team workshops, or interest in future participation please contact WideOpen.

ABOUT WIDEOPEN

WideOpen helps organizations navigate the complexity and opportunity associated with customer experience. Our healthcare practice works with organizations to center and connect their efforts to the "humans of healthcare", with services spanning Insights, Strategy, and Blueprints. With deep executive level experience in working with prominent healthcare organizations, we work side by side as client partners and expert practitioners to strategically anchor and activate customer experience to create lasting connections.

ThisIsWideOpen.com
contact@thisiswideopen.com