

Increasing the positive **impact of patient experience measurement.**

Joel Lehmann Executive Director – EQUAM Foundation

Unisanté Colloques du DSS

Lausanne, 14.March 2023



Who is here today?

Trained Medical doctor

Practicing medical doctor

Family doctor

Pharmacist

PhD doctor

Nurse

Epidemiologist

Social researcher

Anthropologist

Something completely different

Received results from a patient survey?

Participated in a patient survey?

Conducted a study with patient survey?

Who is here by car today?

The vision

- Patient-experience as a **continuous sensor** in a **system that improves (= adapts)**
- Patient-feedback as something that is **interesting** and **enjoyable**

A simple starting point...

If you want to achieve something (in communication), it all depends on **what** you say, and **how** you say it.

Today's session:

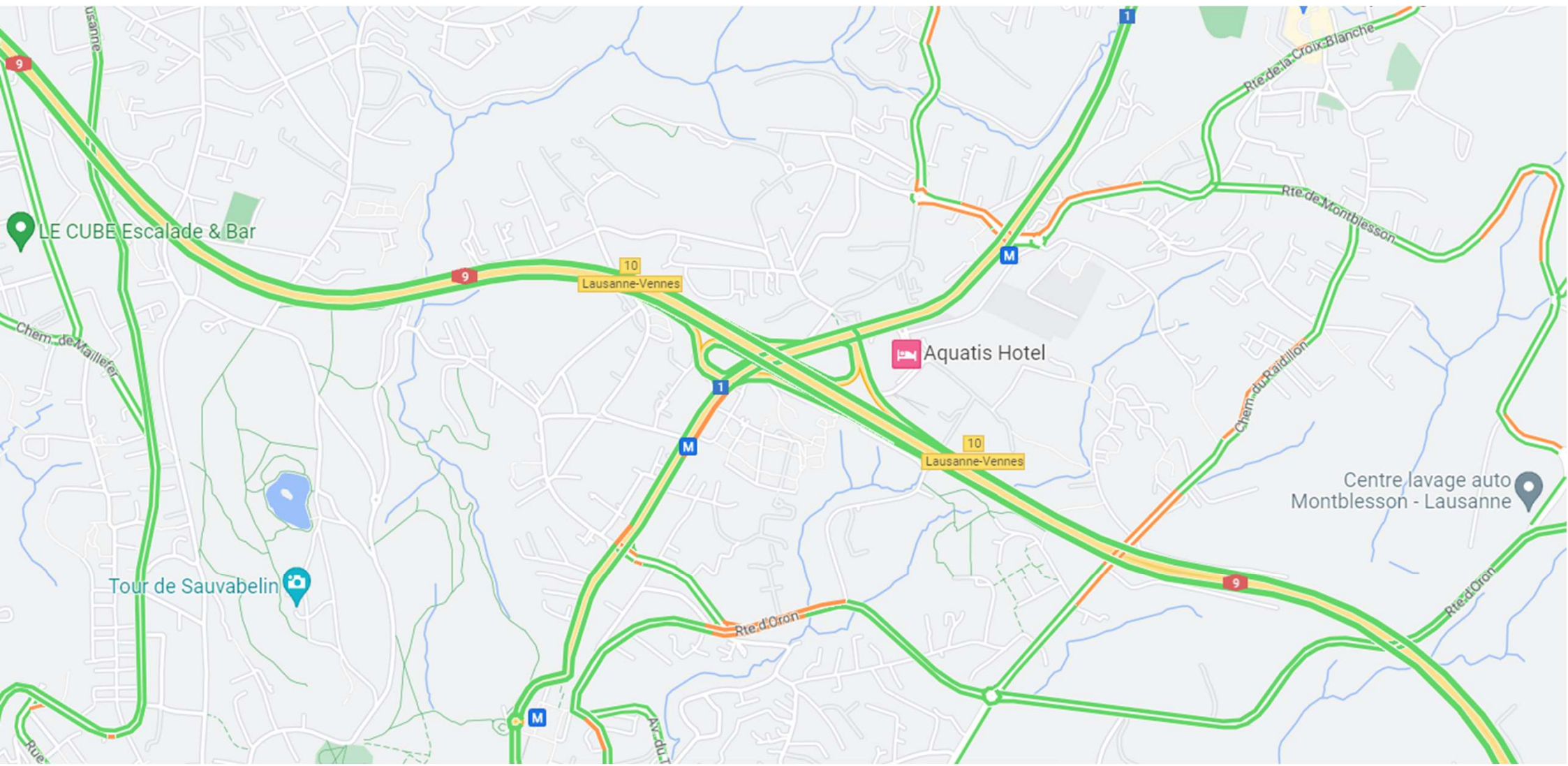
- 1. What to say**
- 2. How to say it**
- 3. Examples from practice**

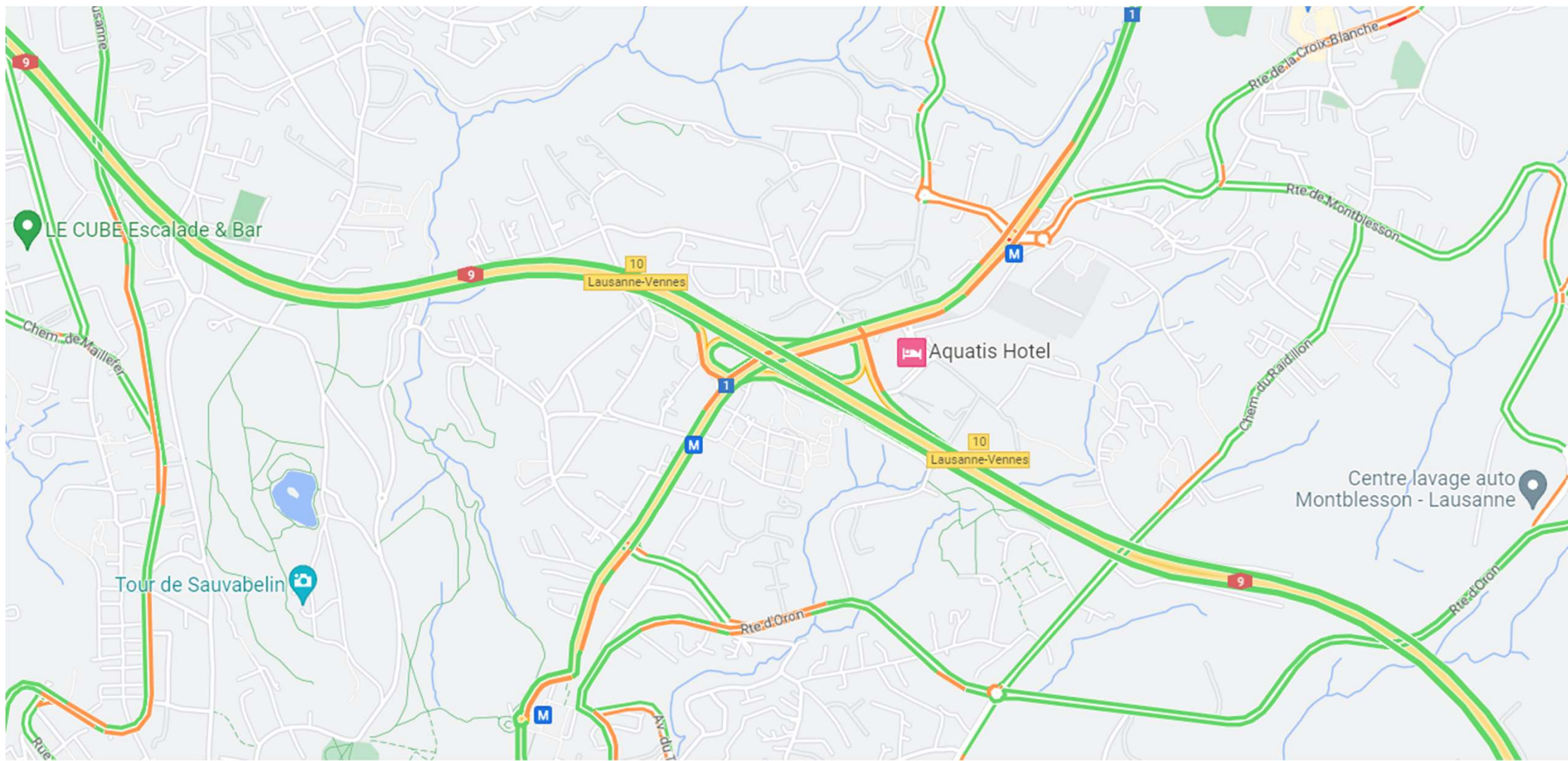
1. What to say

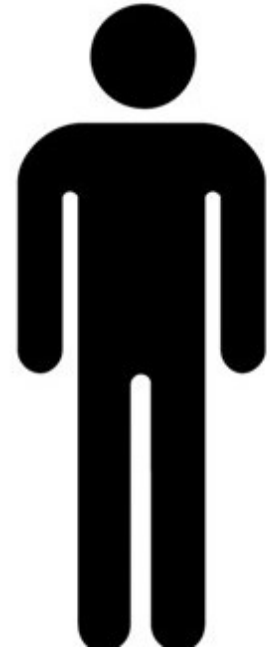
(Practical information is an emergent phenomenon)

Data ≠ Information

Most of us say it - but **few really put it into practice.**







A message must have relevant and novel content to become information.

1. It must relate to a **need** and a **possibility for action**.
2. It must have **previously unknown** elements.
3. It must be available at the **right place**, at the **right time**.



Two types of practical information.

Situational Information

Information that highlights **problems** or **opportunities**

Process/ situation monitoring and optimization

Key question: **What?** Who? When? Where?

Directional Information

Information that shows **options** or **recommendations**

Comparison of specific **choices**

Key question: **How? Where to?**



2. How to say it

A 5 min. teaser

(Good practice in data visualization)

Four purposes of data visualization

Exploration

Find information

Explanation

Show information

Operation

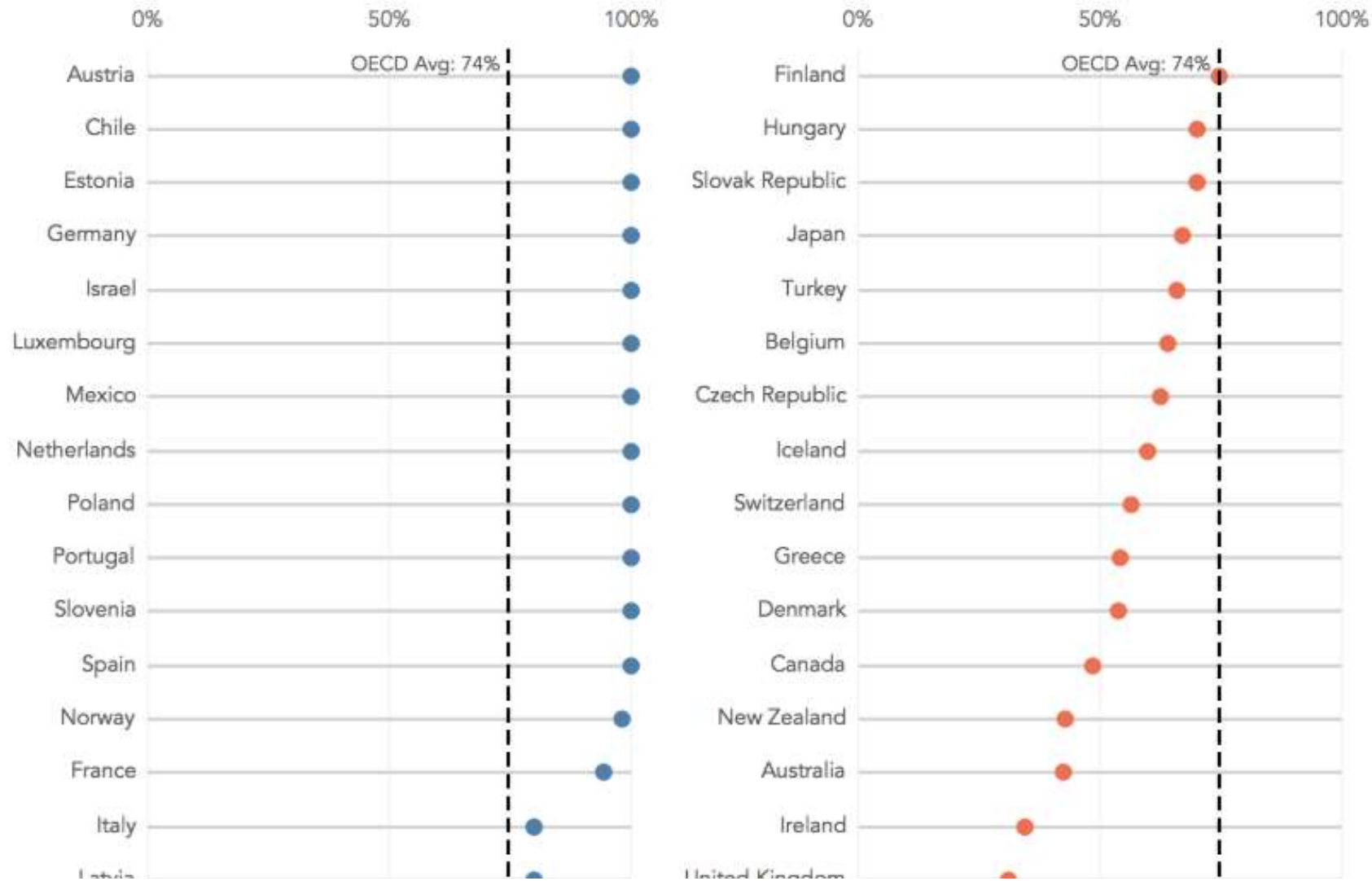
See information

(Decoration)

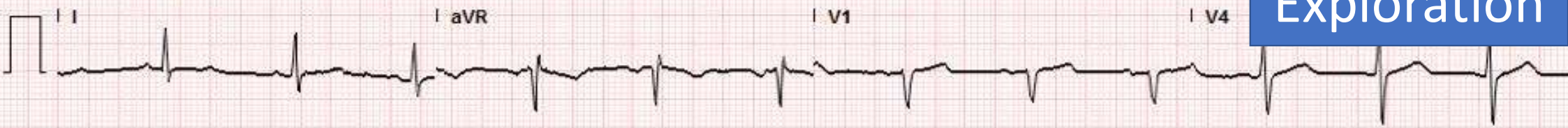
Attract or impress

Maternity Leave Pay Rate in OECD Countries

• ABOVE OECD AVERAGE • BELOW OECD AVERAGE



Exploration



Percent of Adults Taking Prescription Drugs

Decoration

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris non elit erat. Etiam ullamcorper, nisi ultricies consectetur posuere, risus neque malesuada enim, a laoreet magna arcu vitae eros. Praesent pulvinar ultricies nibh, porta dignissim nisi pretium et.



Operation



Exploration

Find information

Explanation

Show information

Operation

See information

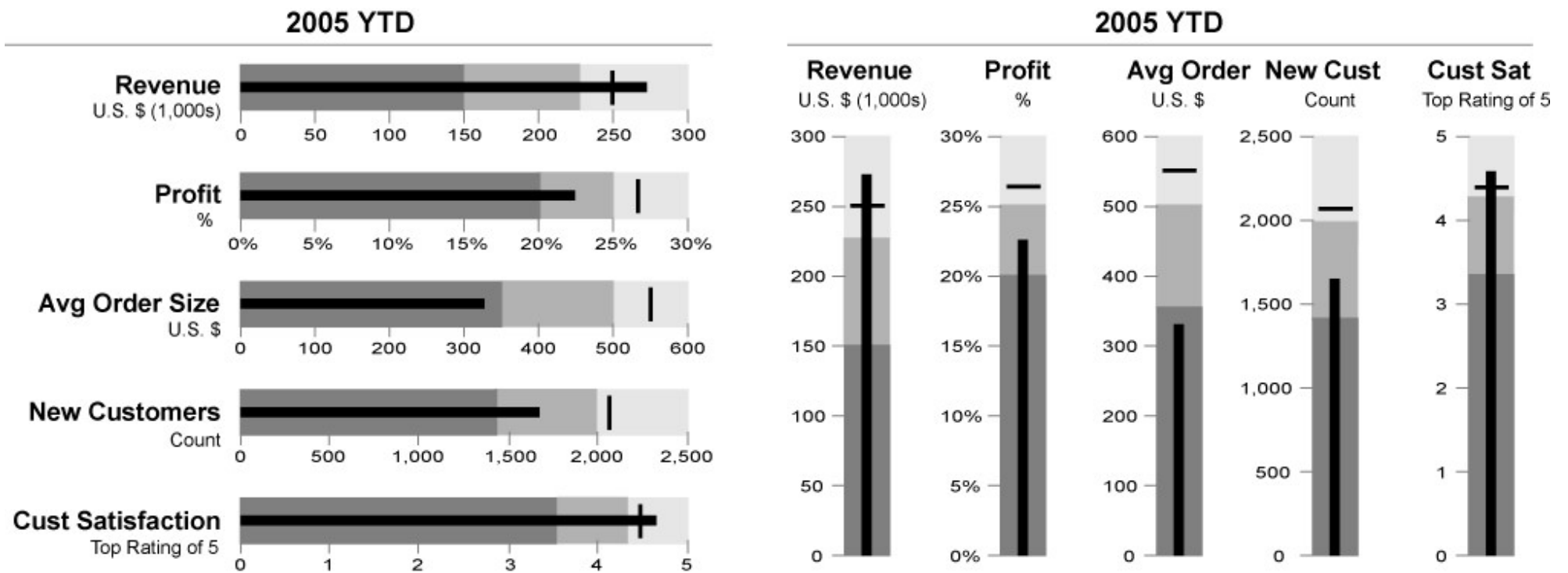
Decoration

Attract or impress

Good, but rarely used: Heatmap



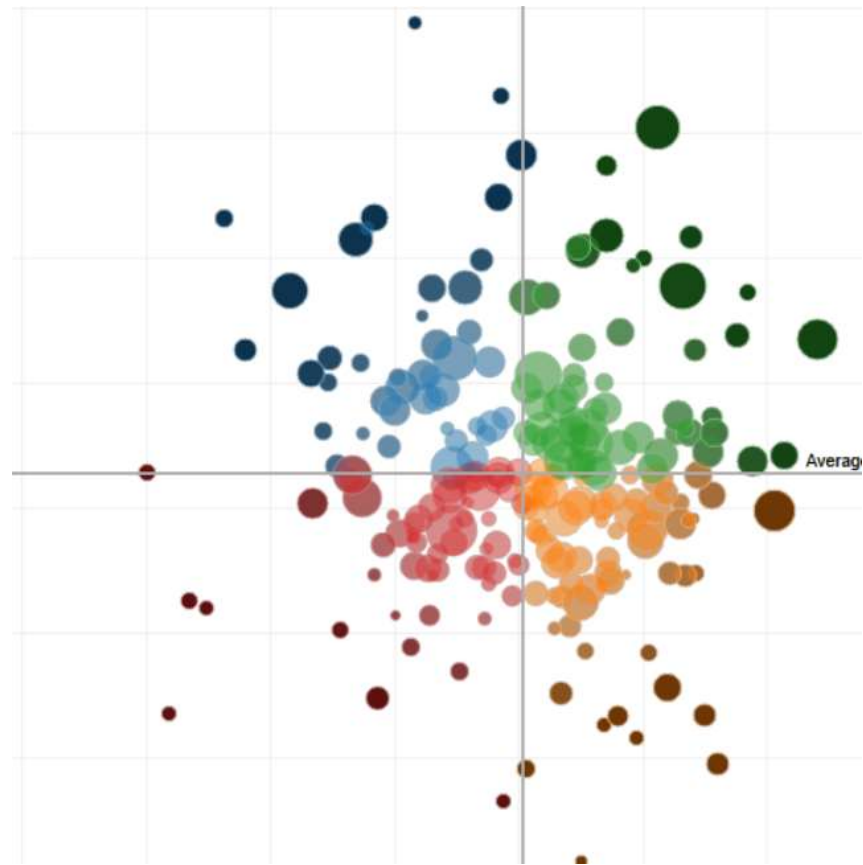
Simple and effective: Bullet charts



Intuitive and Information-dense: Bubble Charts

Encode **four** dimensions

- Position on two axes
- Colour
- Size



Much easier than you think: Maps / Choropleth

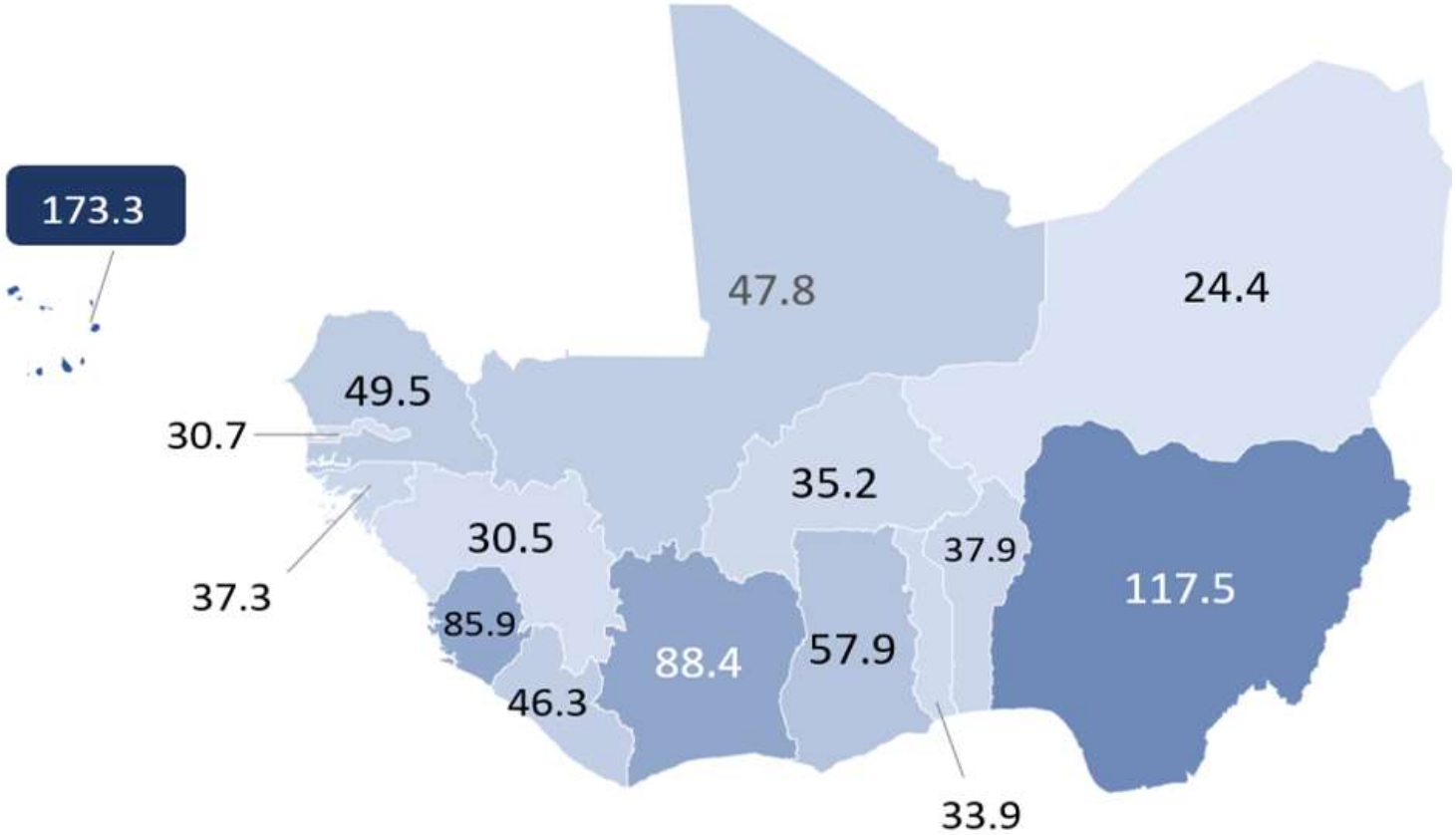
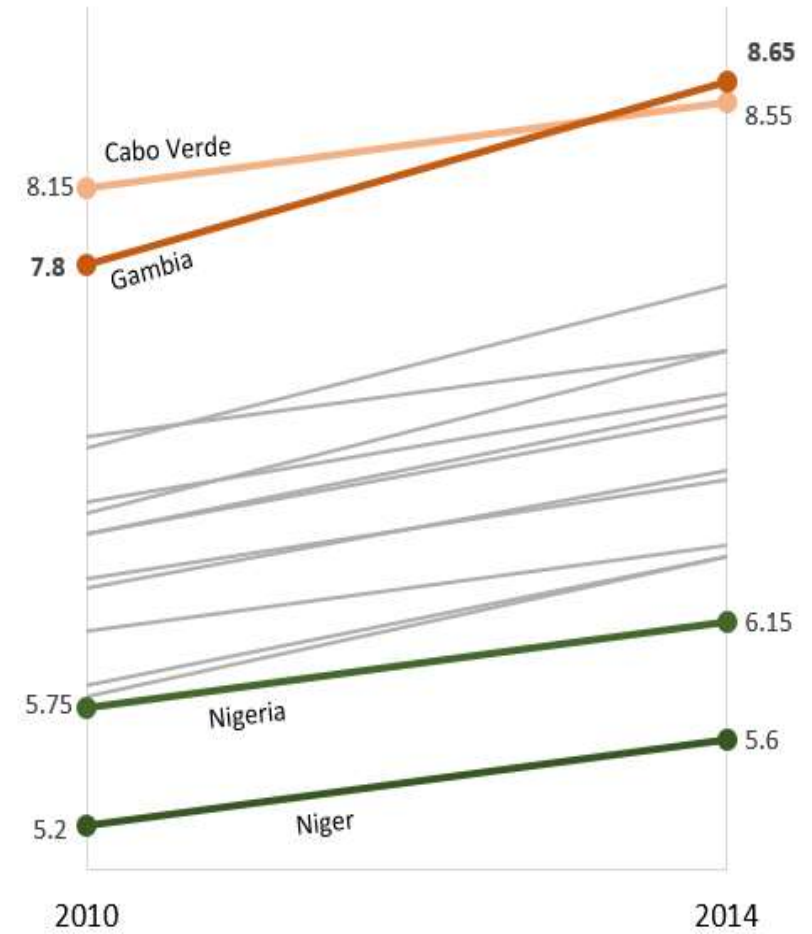
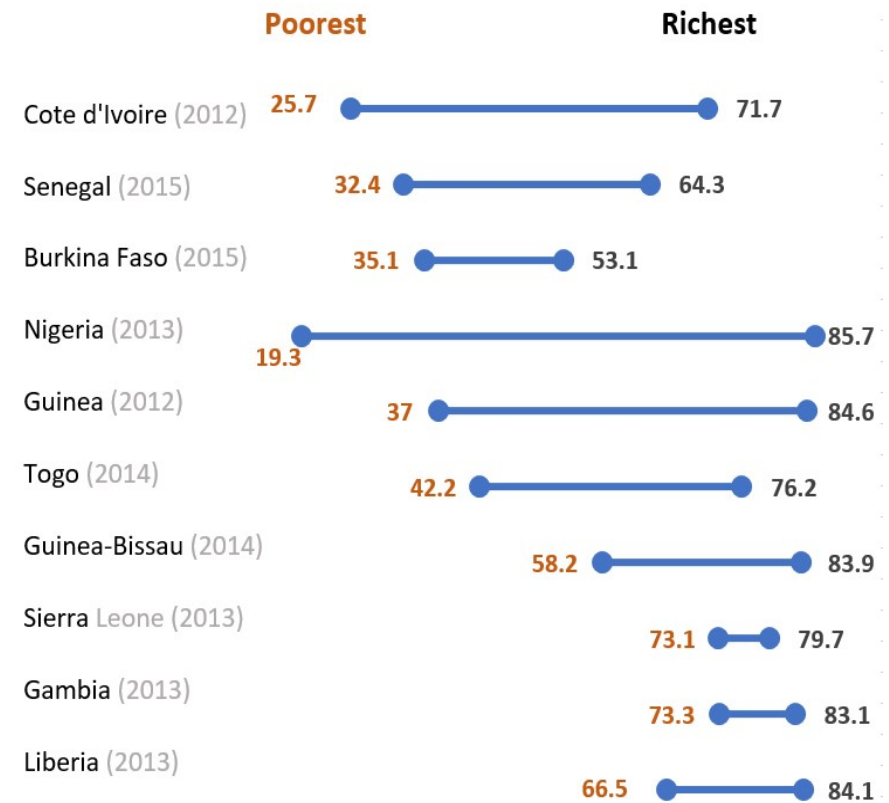


Figure 6: Latest (2014) Total Govt. Expenditure on health per capita in ECOWAS member countries

Simple and effective: Slopegraphs



Intuitive and important: Dot Plot



*% Antenatal care four visits coverage,
first and last wealth quintile in the ECOWAS region (latest data)*

3. Trying to apply it in practice.

Why do doctors tend to avoid patient surveys?

They don't experience it as information, but rather as...

- ... A performance assessment (= a threat)
- ... administrative work

They have doubts with regards to the relevance...

- Patients may not know what really matters in healthcare
- Patients may have unrealistic expectations
- The methodology could produce artefacts

Why do doctors tend to avoid patient surveys?

They have no need to assess patient satisfaction

- Patients come anyway and we are not accepting any new patients

They have rarely experienced useful information from patient surveys

Priorities of **primary care** doctors (anecdotal evidence)

- Have **lots of other things** on their mind
- Want to recover (or maintain) **joy in work**
- Want to provide **good care to patients**
- Care about **personal and professional reputation**

Summary

The first step to more impact is to **win the heart and mind** of practitioners by offering a solution that requires **minimal effort** for data collection, minimal effort to see **practically meaningful results**, and provide a **direct route** to professional pride, joy in work and/or good patient care.

What are PREMS? (Patient reported experience measures)

≠ Patient satisfaction survey

≠ Online Rating (Stars)

≠ PROMS

EUROPEP examples Questions

What is your assessment of your doctor over the last 12 month, with respect to...

- ... Making you feel he/she takes time for you during the consultation?
- ... Involving you in decisions about your medical care?
- ... Explaining the purpose of examinations, tests and treatments?
- ... Helping you deal with the emotions related to your health status?
- ... Helping understand why it is important to follow his/her advice?

Picker example Questions

- ... Did doctors sometimes talk in front of you as if you weren't there?
- ... Did nurses sometimes talk in front of you as if you weren't there?
- ... If your family or someone close to you wanted to talk to a doctor, did they have enough opportunity to do so?
- ... Were you involved as much as you wanted to be in decisions about your care and treatment?

CAHPS example Questions

... In the last 6 months, when you needed care right away, how often did you get care as soon as you needed?

... In the last 6 months, how often did your personal doctor seem informed and up to- date about the care you got from these doctors or other health providers?

... In the last 6 months, how often were you advised to quit smoking or using tobacco by a doctor or other health provider in your plan?

Case study 1

EQUAM collaboration & EUROPEP

Case Study 1



Quick Facts

- About EUROPEP
- Context of the survey
- The situation before

Practice name | Network name
Survey date

2. How do our patients experience care in our practice, compared to others?

THEMA	MY SCORE	BEST IN CLASS
them 1	83%	-5%
them 2	71%	-10%
them 3	65%	-13%
them 4	86%	-8%
them 5	69%	-6%
them 6	73%	+5%
them 7	79%	-5%

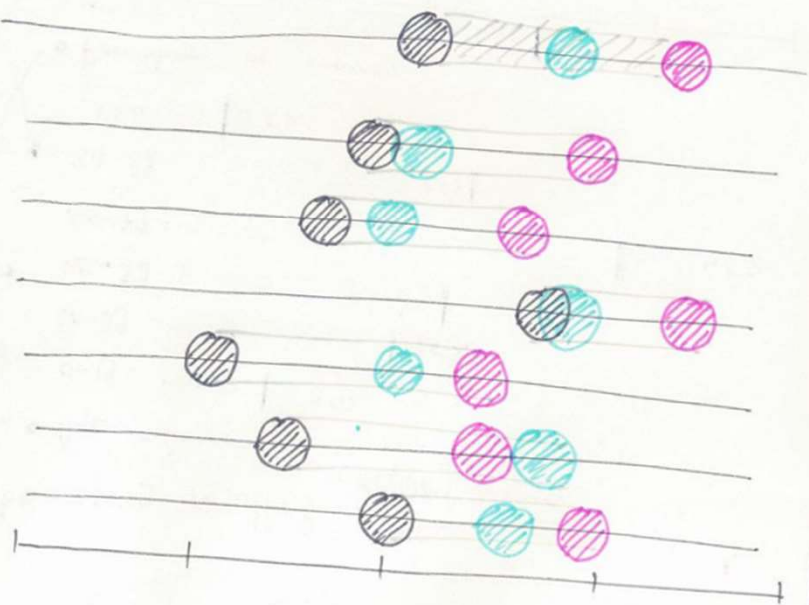


chart key

navigation

01115

1: Indi
Visueller
5 Folien

vey will receive an
improve
t on.
see how the
ill be compared to

Peer-Comparison

2020 - 2022

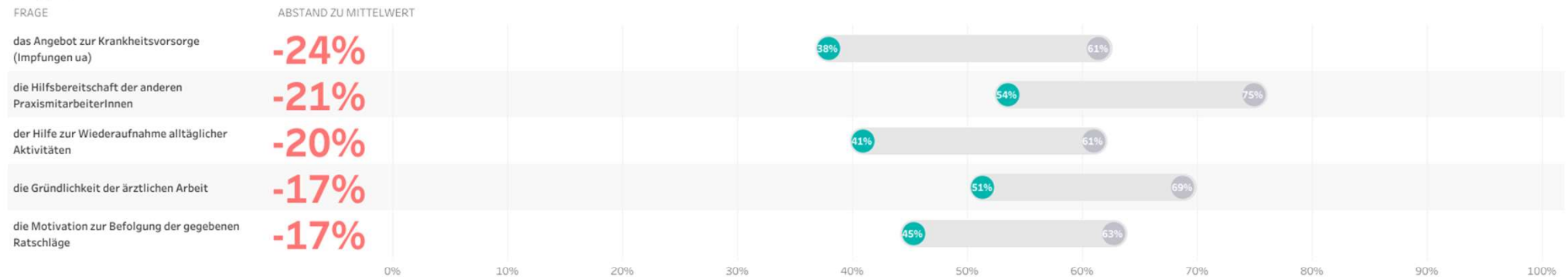
Wie nehmen mich meine Patient:innen wahr,
im Vergleich zur Wahrnehmung bei anderen Ärzt:innen?



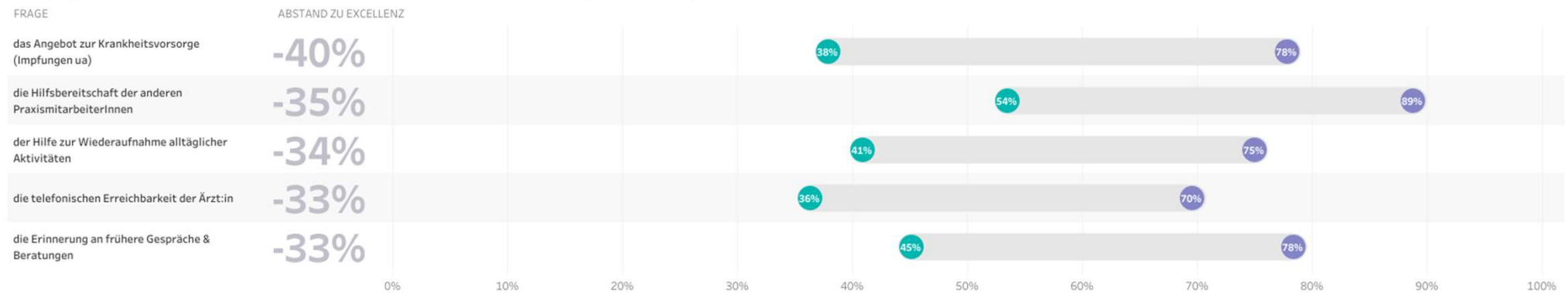
Top-5 thematic priorities

Prioritäten zur Verbesserung

Fragen, bei denen die meisten anderen Ärzt:innen besser abschneiden



Fragen, bei denen die Patient:innen der Schuh besonders drückt (Pain Points)



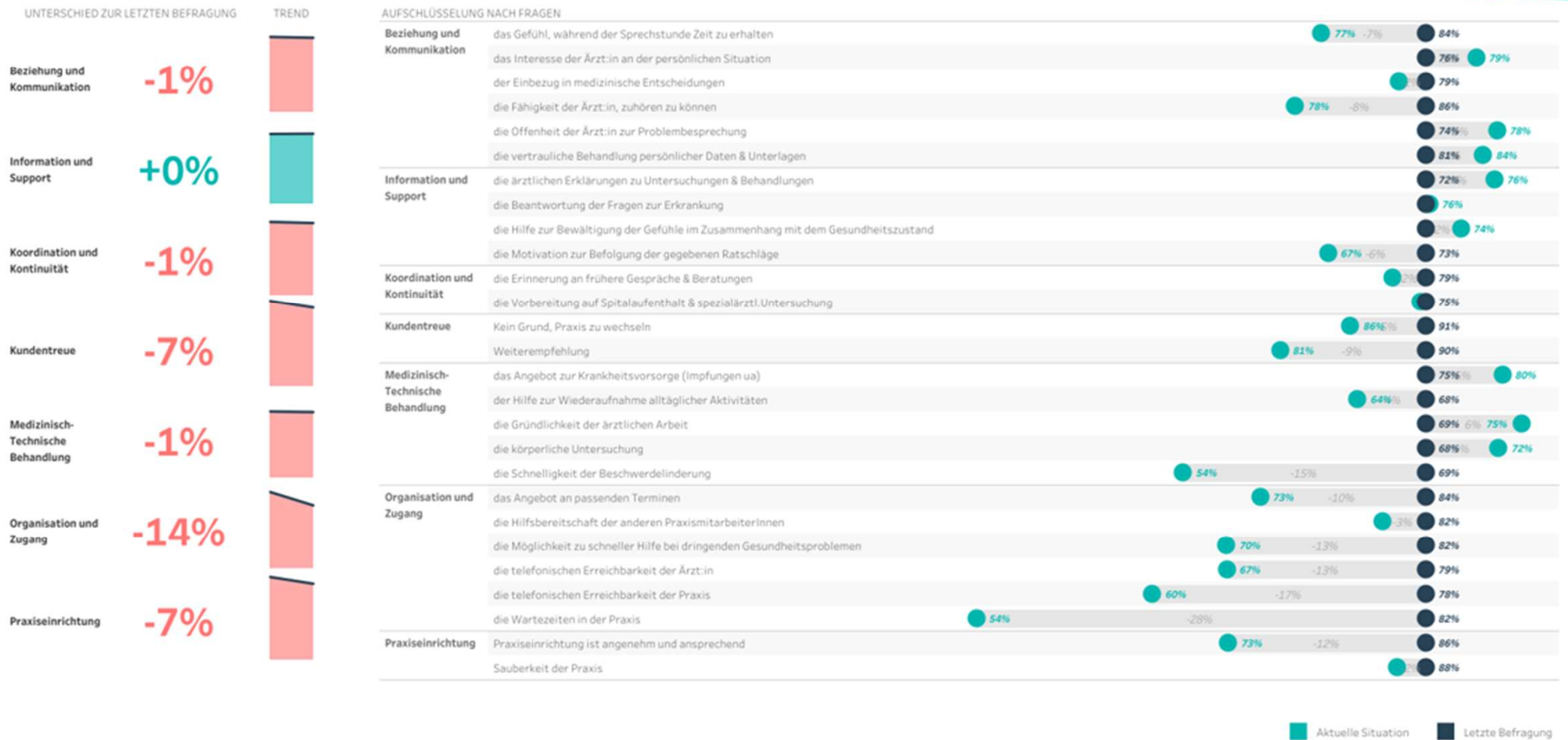
Welche Patientengruppen benötigen besondere Aufmerksamkeit?

Patient segments

THEMA	FRAGE	GESAMTSKORE	ALTERSGRUPPEN					GESCHLECHT		CHRONISCHE ERKRANKUNG		anderer Abschluss	Fachhochschu oder Hochsch	Mittelschule abgeschloss Berufslehre	Primärschi Sekundär
			0-19	20-39	40-59	60-79	80-99	männlich	weiblich	Ja	Nein				
Beziehung und Kommunikation	das Gefühl, während der Sprechstunde Zeit zu erhalten	58%		50%	71%	62%	33%	48%	68%	53%	63%	80%	33%	56%	58%
	das Interesse der Ärzt:in an der persönlichen Situation	64%		60%	65%	70%	33%	55%	72%	59%	67%	80%	62%	56%	58%
	der Einbezug in medizinische Entscheidungen	66%		63%	69%	69%	50%	54%	78%	70%	65%	67%	62%	69%	61%
	die Fähigkeit der Ärzt:in, zuhören zu können	73%		80%	65%	70%	67%	65%	81%	65%	81%	90%	69%	74%	58%
	die Offenheit der Ärzt:in zur Problembesprechung	61%		65%	53%	59%	67%	53%	69%	50%	69%	80%	54%	59%	53%
	die vertrauliche Behandlung persönlicher Daten & Unterlagen	69%		75%	64%	63%	67%	55%	83%	65%	72%	75%	75%	73%	53%
Information und Support	die ärztlichen Erklärungen zu Untersuchungen & Behandlungen	56%		55%	53%	58%	20%	50%	60%	58%	52%	60%	33%	48%	67%
	die Beantwortung der Fragen zur Erkrankung	64%		68%	63%	58%	60%	59%	68%	58%	70%	78%	38%	64%	67%
	die Hilfe zur Bewältigung der Gefühle im Zusammenhang mit dem Gesundheitszustand	51%		65%	42%	42%	60%	45%	54%	47%	54%	88%	40%	38%	50%
	die Motivation zur Befolgung der gegebenen Ratschläge	45%		35%	54%	40%	60%	46%	41%	42%	48%	50%	36%	48%	47%
Koordination und Kontinuität	die Erinnerung an frühere Gespräche & Beratungen	45%		39%	36%	46%	50%	44%	42%	45%	43%	44%	50%	36%	53%
	die Vorbereitung auf Spitalaufenthalt & spezialärztl. Untersuchung	55%		60%	44%	54%	50%	56%	50%	45%	65%	71%	50%	44%	61%
Kundentreue	Kein Grund, Praxis zu wechseln	70%		55%	69%	85%	50%	62%	78%	76%	66%	70%	54%	73%	72%
	Weiterempfehlung	65%		60%	69%	76%	33%	61%	69%	65%	67%	70%	54%	65%	65%
Medizinisch-Technische Behandlung	das Angebot zur Krankheitsvorsorge (Impfungen ua)	38%		38%	25%	46%	0%	30%	43%	33%	40%	57%	27%	28%	39%
	der Hilfe zur Wiederaufnahme alltäglicher Aktivitäten	41%		37%	50%	41%	0%	37%	42%	42%	34%	56%	36%	32%	42%
	die Gründlichkeit der ärztlichen Arbeit	51%		50%	65%	44%	50%	43%	59%	47%	56%	80%	38%	56%	42%
	die körperliche Untersuchung	48%		56%	47%	44%	0%	40%	55%	39%	55%	78%	40%	35%	47%
	die Schnelligkeit der Beschwerdelinderung	33%		39%	31%	28%	33%	32%	33%	22%	43%	56%	30%	29%	26%
Organisation und Zugang	das Angebot an passenden Terminen	58%		53%	63%	52%	67%	54%	61%	65%	50%	50%	54%	63%	53%
	die Hilfsbereitschaft der anderen PraxismitarbeiterInnen	54%		45%	64%	52%	50%	58%	45%	48%	56%	33%	62%	58%	50%
	die Möglichkeit zu schneller Hilfe bei dringenden Gesundheitsproblemen	50%		50%	36%	50%	60%	38%	61%	44%	57%	67%	50%	38%	47%
	die telefonischen Erreichbarkeit der Ärzt:in	36%		25%	29%	44%	40%	26%	45%	33%	38%	50%	0%	21%	47%
	die telefonischen Erreichbarkeit der Praxis	62%		60%	76%	54%	67%	57%	66%	71%	56%	70%	50%	59%	65%
	die Wartezeiten in der Praxis	53%		45%	53%	56%	67%	48%	56%	50%	56%	50%	46%	48%	63%
Praxiseinrichtung	Praxiseinrichtung ist angenehm und ansprechend	59%		60%	53%	68%	50%	58%	61%	66%	56%	70%	42%	56%	67%
	Sauberkeit der Praxis	81%		75%	88%	81%	83%	79%	84%	88%	78%	70%	77%	85%	83%
STICHPROBENGRÖSSE:			1	20	17	27	6	40	32	34	36	10	13	27	19

Change over time

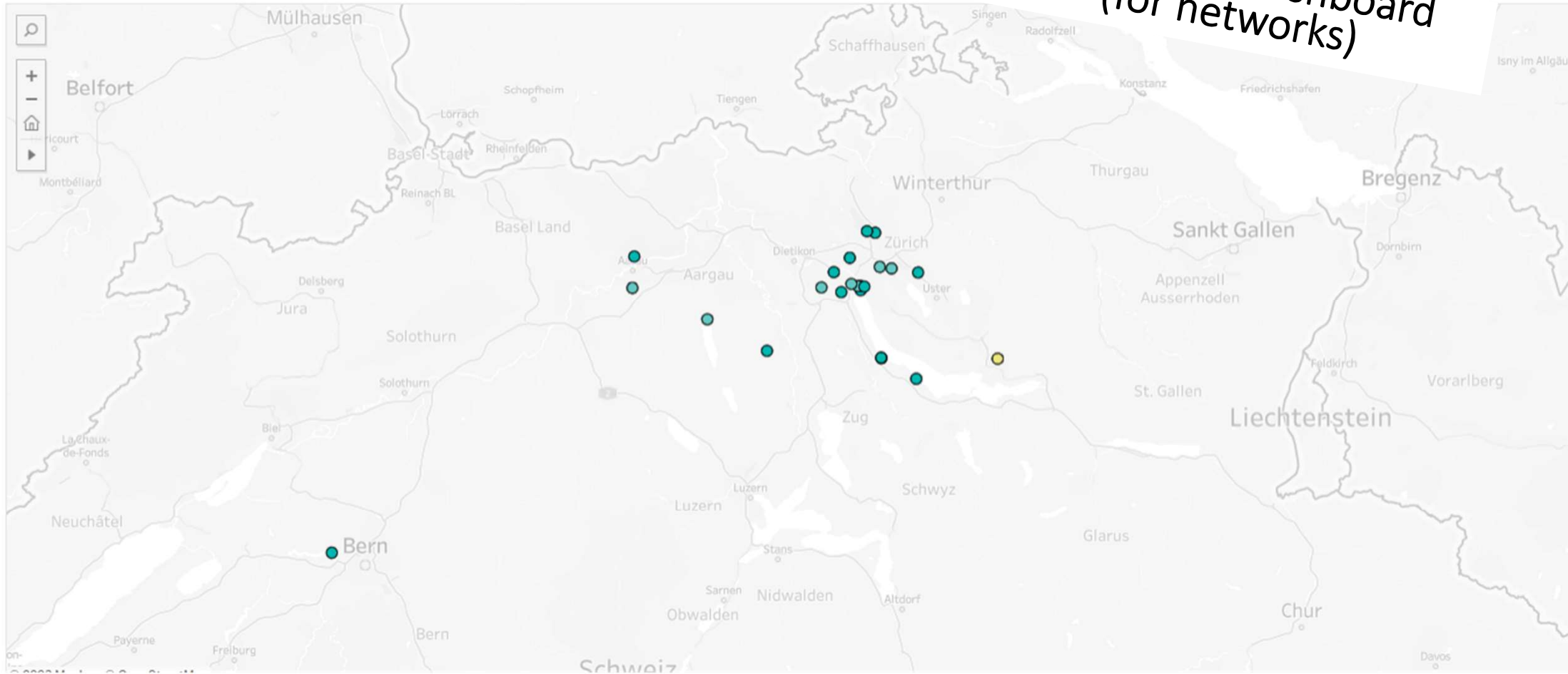
Was hat sich seit der letzten Befragung geändert? (2019)



Geographische Übersicht nach Themenbereich

JAHR: (All) THEMA: Kundentreue

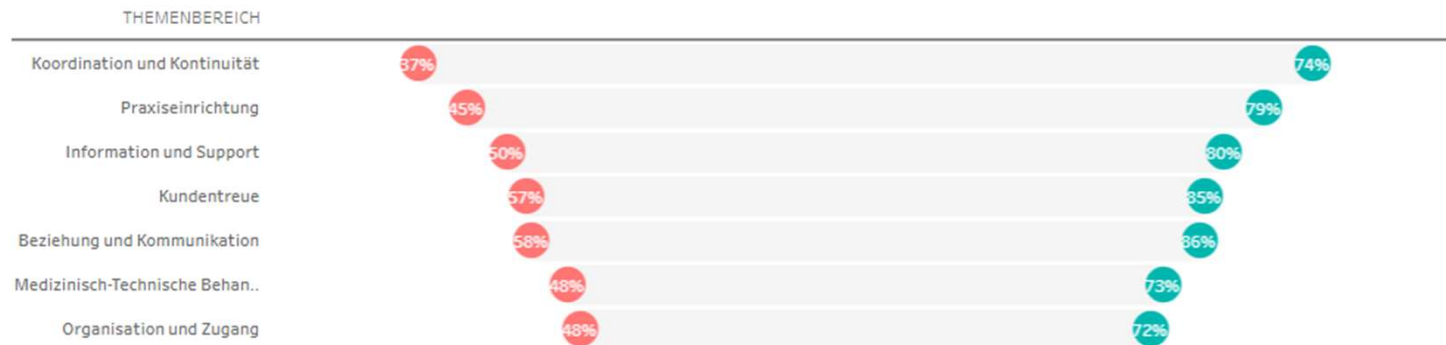
Interactive Dashboard
(for networks)



«Mind the gap»

Minimal- und Maximalwerte

JAHR: THEMENBEREICH:



TOP-5 SCORES IM THEMENBEREICH

...	86%
...	80%
...	79%
...	78%
...	77%

Fokus auf spezifische Patientengruppen

JAH: (All) | ALTERSGRUPPE: 40-59 | GESCHLECHT: weiblich | CHRONISCHE ERKRANKUNG: Ja | BILDUNG: Fachhochschule oder Hochsc...

GESAMTSORE IM NETZ

Beziehung und Kommunikation	das Gefühl, während der Sprechstunde Zeit zu erhalten	70% (103)
	das Interesse der Ärzt:in an der persönlichen Situation	70% (103)
	der Einbezug in medizinische Entscheidungen	71% (103)
	die Fähigkeit der Ärzt:in, zuhören zu können	78% (104)
	die Offenheit der Ärzt:in zur Problembesprechung	67% (103)
	die vertrauliche Behandlung persönlicher Daten & Unterlagen	86% (100)
Information und Support	die ärztlichen Erklärungen zu Untersuchungen & Behandlungen	69% (99)
	die Beantwortung der Fragen zur Erkrankung	64% (99)
	die Hilfe zur Bewältigung der Gefühle im Zusammenhang mit dem Gesundheitszustand	55% (96)
	die Motivation zur Befolgung der gegebenen Ratschläge	58% (88)
Koordination und Kontinuität	die Erinnerung an frühere Gespräche & Beratungen	52% (85)
	die Vorbereitung auf Spitalaufenthalt & spezialärztl. Untersuchung	61% (67)
Kundentreue	Weiterempfehlung	70% (104)
Medizinisch-Technische Behandlung	das Angebot zur Krankheitsvorsorge (Impfungen ua)	50% (82)
	der Hilfe zur Wiederaufnahme alltäglicher Aktivitäten	55% (91)
	die Gründlichkeit der ärztlichen Arbeit	59% (102)
	die körperliche Untersuchung	61% (95)
	die Schnelligkeit der Beschwerdelinderung	39% (90)
Organisation und Zugang	das Angebot an passenden Terminen	62% (105)
	die Hilfsbereitschaft der anderen PraxismitarbeiterInnen	70% (103)
	die Möglichkeit zu schneller Hilfe bei dringenden Gesundheitsproblemen	56% (86)
	die telefonischen Erreichbarkeit der Ärzt:in	40% (58)
	die telefonischen Erreichbarkeit der Praxis	45% (103)
	die Wartezeiten in der Praxis	28% (105)
Praxiseinrichtung	Praxiseinrichtung ist angenehm und ansprechend	41% (102)
	Sauberkeit der Praxis	79% (105)

PRAXIS MIT DER BESTEN PATIENTENWAHRNEHMUNG

Drill-down on specific Segments

What have we learned so far (examples)?

- The meaning of a number must be **clarified immediately**
- A patient survey can subjectively **constitute a threat**
- If we are not careful, we can **cause damage**
- **Targeted/personalized analysis works well** (and at scale)

What have we learned so far (examples)?

- Top-notch data visualization can be **affordable and flexible**
- **Transparency** can drastically **increase the value** of results
- **Comparison group** matters a lot
- Verbal presentation can make a big difference (but might not work at scale)

Case study 2

Insel Gruppe  Picker

Case Study 2

 INSELGRUPPE

Insel Gruppe  Picker

Quick Facts

- What is the Picker questionnaire?
- Why did Insel introduce it?
- What was the situation before?

Response Monitoring

Rücklauf Total

Verschickt
3682

Beantwortet
1935

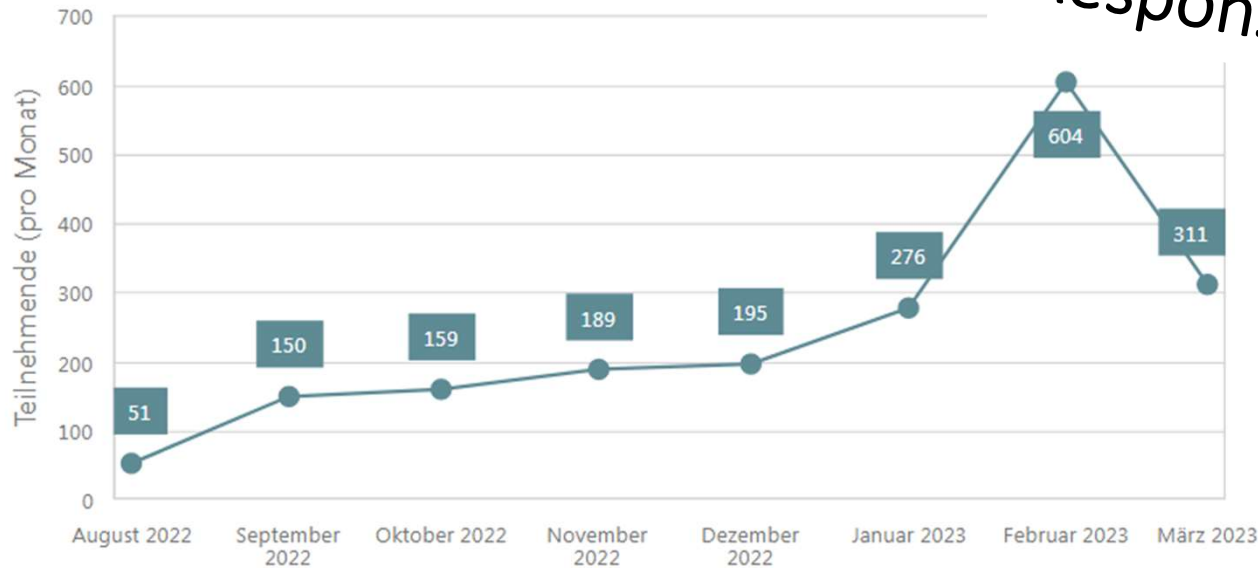
Rücklauf
52,55 %
-1,75Tsd.

Anteil mit Einwilligung ab 21. Januar 2023

Gesamtanteil E...

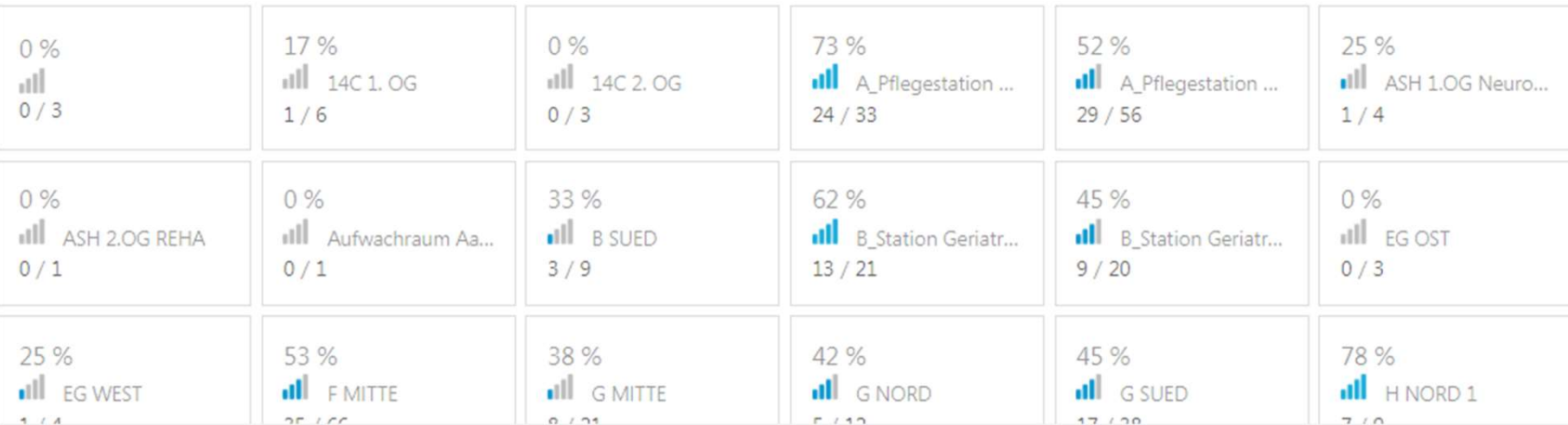
E 21 % 1902

Einwillig...	Fälle	Patien...	Ant...
K	747	621	8 %



- 13.3.2023
- 12.3.2023
- 11.3.2023
- 10.3.2023
- 9.3.2023
- 8.3.2023
- 7.3.2023
- 6.3.2023

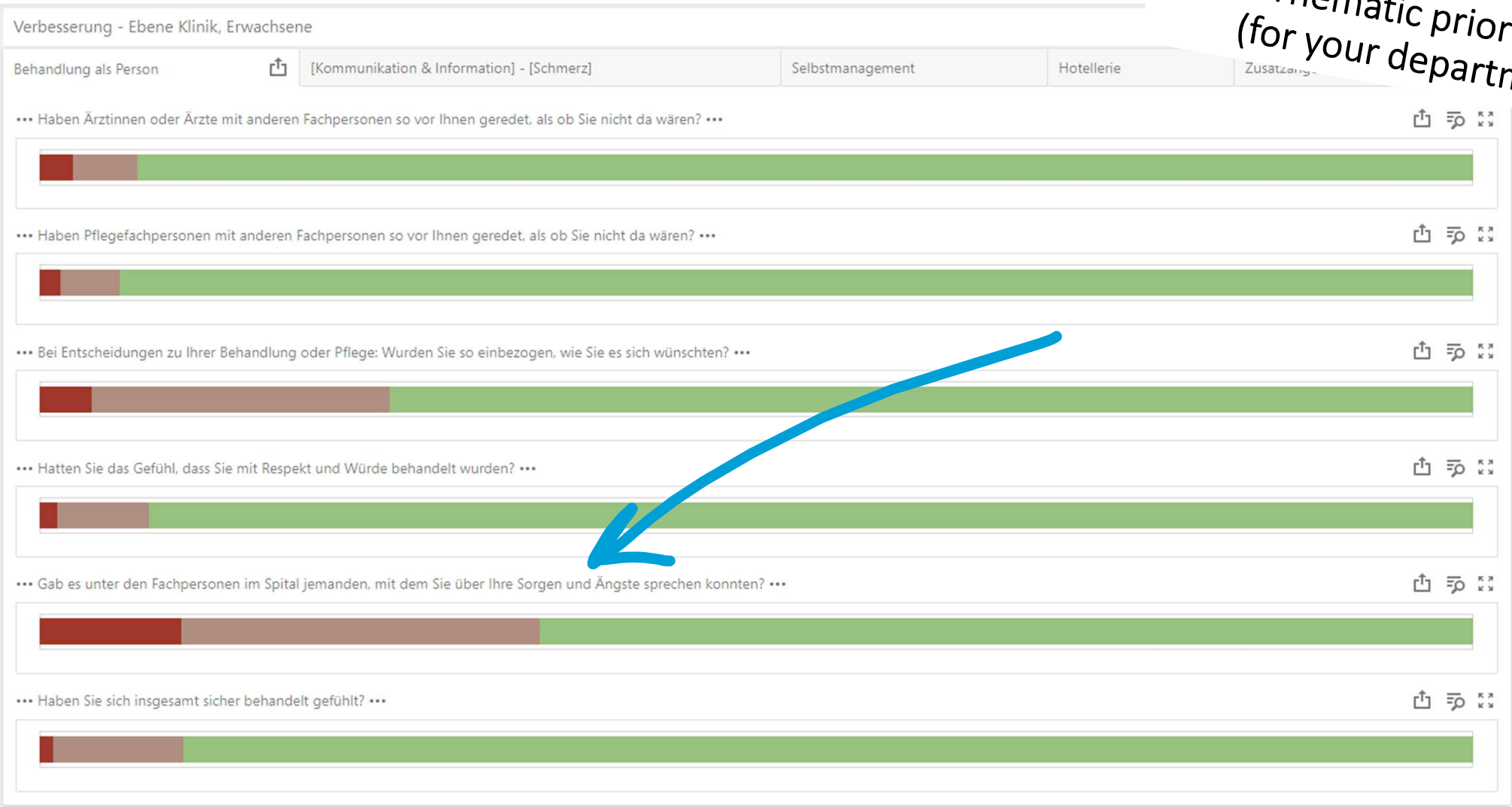
Rücklauf nach Pflegestation



Real-time, targeted
Open-ended Feedback

Ausgefüllt	Entlassungsdatum	JHG	GES	Rückmeldung	W-Score		
1.3.2023	18.2.2023	1945	M	Ich war wohl ein letztes Mal in einem Vierbett-Zimmer. War ja auch nur für 2 Nächte.	7		
1.3.2023	18.2.2023	1996	M	Meine Operation wurde verschoben, da es keine leeren Betten gab. Zudem verstehe ich nicht, dass am Freitag ein Vegi-Tag ist.	10		Ja, mit einer hierfür zuständigen Person der Klinik
1.3.2023	19.2.2023	1945	W	- Das OP-Gespräch mit Herrn Pro [redacted] war erfreulicherweise sehr MENSCHLICH, verständlich, ausführlich! Auch mein anwesender Ehemann und eine anwesende Tochter konnten ihre Fragen stellen und erhielten ohne jeglichen Stress kompetente Auskünfte! DANKESCHÖN! - Leider kam der Schlaf infolge Helikopterlärm zu kurz, was sich aber nicht ändern lässt...	10		Nein
1.3.2023	25.2.2023	1950	M	Nein	8		Nein
1.3.2023	25.2.2023	1956	W	Ich bekam eine Bettnachbarin welche eine 24 Std.- Betreuung benötigte. Dies hatte zur Folge dass die Nachtruhe erheblich gestört wurde. Mir wurde angeboten in einem anderen Raum die Nacht zu verbringen.	9		Nein
1.3.2023	26.2.2023	1968	M	Termintreue bei feststehenden Terminen	0		Nein
1.3.2023	27.2.2023	1988	W	Alle Beteiligten waren stets sehr freundlich und unterstützend, ich habe mich sehr gut aufgehoben gefühlt. Ich habe es vor allem sehr geschätzt dass man mir mit Mitgefühl und nicht mit Mitleid begegnet ist und sich vor allem auch die Ärzte Zeit genommen haben, mir alles zu erklären und auf meine Ängste eingegangen sind	10		Nein

Thematic priorities
(for your department)



Teilneh...

Auswahl Zeitfenster...

Set Fil...

Fachbereich

Suchtext eingeben...

(Alle)

MB AbMe

MB FrAu

MB HeGe

MB IM

Pflegestation

Suchtext eingeben...

(Alle)

MB AbMe

MB FrAu

MB HeGe

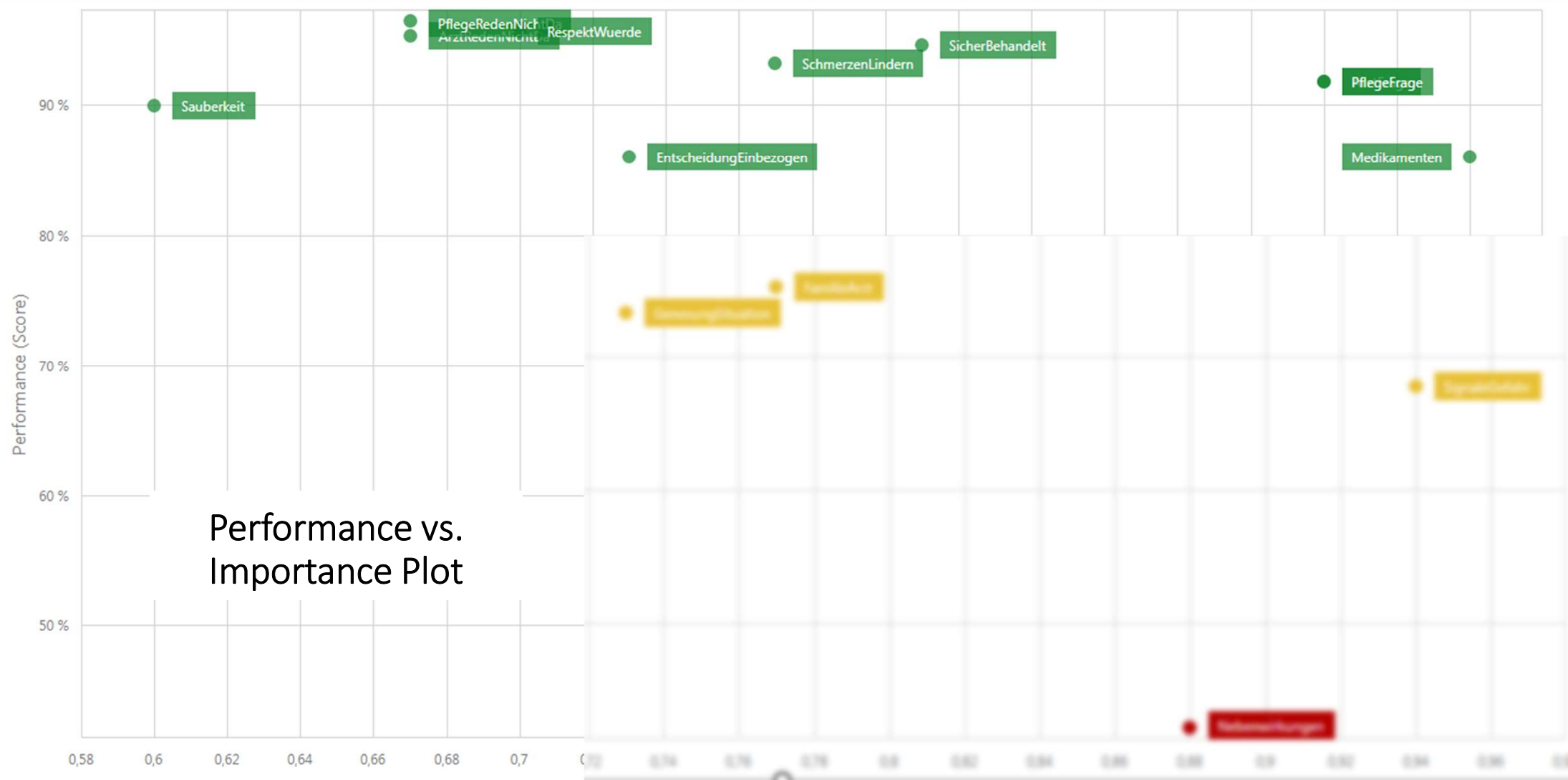
Problem Zone Identification

Prioritäten nach Station (Erwachsene) ▾

Bei allen Fragen gilt: Je höher der Score, desto besser.

Pflegestation	n=	Respekt Wuerde	Arzt Reden "NichtDa"	Pflege Reden "NichtDa"	Ärztin Verständlich	Pflege Verständlich	Entscheidung Einbezogen	Familie Arzt	Familie helfen	Medi Zweck	Nebenwirkungen	Schmerzen lindern	Sicher gefühlt	Signale Gefahr	Sorgen Ängste	Widerspruch
...	...	98 %	99 %	99 %	96 %	92 %	89 %	84 %	79 %	91 %	42 %	98 %	93 %	75 %	71 %	87 %
...	...	93 %	92 %	94 %	84 %	89 %	76 %	61 %	60 %	84 %	32 %	91 %	88 %	51 %	62 %	79 %
...	...	95 %	98 %	95 %	93 %	91 %	91 %	77 %	79 %	88 %	53 %	94 %	93 %	66 %	82 %	90 %
...	...	100 %	100 %	100 %	95 %	98 %	86 %	77 %	86 %	84 %	39 %	92 %	93 %	69 %	79 %	86 %
...	...	100 %	98 %	94 %	96 %	96 %	90 %	72 %	75 %	77 %	42 %	88 %	96 %	56 %	92 %	98 %
...	...	100 %	98 %	96 %	98 %	98 %	91 %	75 %	89 %	92 %	56 %	97 %	100 %	65 %	92 %	85 %
...	...	96 %	100 %	100 %	95 %	95 %	83 %	50 %	71 %	100 %	44 %	92 %	95 %	59 %	88 %	92 %
...	...	88 %	96 %	96 %	100 %	88 %	79 %	80 %	50 %	100 %	57 %	100 %	88 %	63 %	64 %	71 %
...	...	95 %	100 %	100 %	90 %	85 %	85 %	83 %	42 %	94 %	14 %	100 %	95 %	65 %	83 %	70 %
...	...	100 %	100 %	92 %	100 %	100 %	90 %	70 %	90 %	80 %	70 %	100 %	100 %	67 %	83 %	83 %
...	...	100 %	100 %	100 %	100 %	75 %	75 %	50 %	100 %	75 %	17 %	88 %	100 %	58 %	100 %	100 %
...	...	100 %	75 %	100 %	100 %	100 %	100 %			100 %	0 %	100 %	100 %	100 %	75 %	83 %
...	...	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %	75 %	100 %	100 %	100 %	100 %	100 %	100 %
...	...	100 %	100 %	100 %	100 %	100 %	100 %			100 %		100 %	100 %	0 %		100 %

Prioritäre Themen Insel Gruppe



Performance vs. Importance Plot

What have we learned so far (examples)?

- What may **seem easy** in terms of technical solutions (at first) may be **more complicated**, for instance:
 - Options in terms of visualization / BI software
 - Problem of screen size (laptop vs. desktop screen)
- **Response rate** for E-Mail based routine patient feedback can be surprisingly high (ca. 50% so far)
- Routine **open-ended** patient feedback is rich and abundant

What have we learned so far (examples)?

- **Management of emotions** may prevail over optimization for perception
- **Treshholds** for conditional formatting must be **well calibrated**
- There appears to **trade-offs** with regards to **good patient communication around medication**

Paula Bezzola, Project Manager (Insel Gruppe)
paula.bezzola@insel.ch

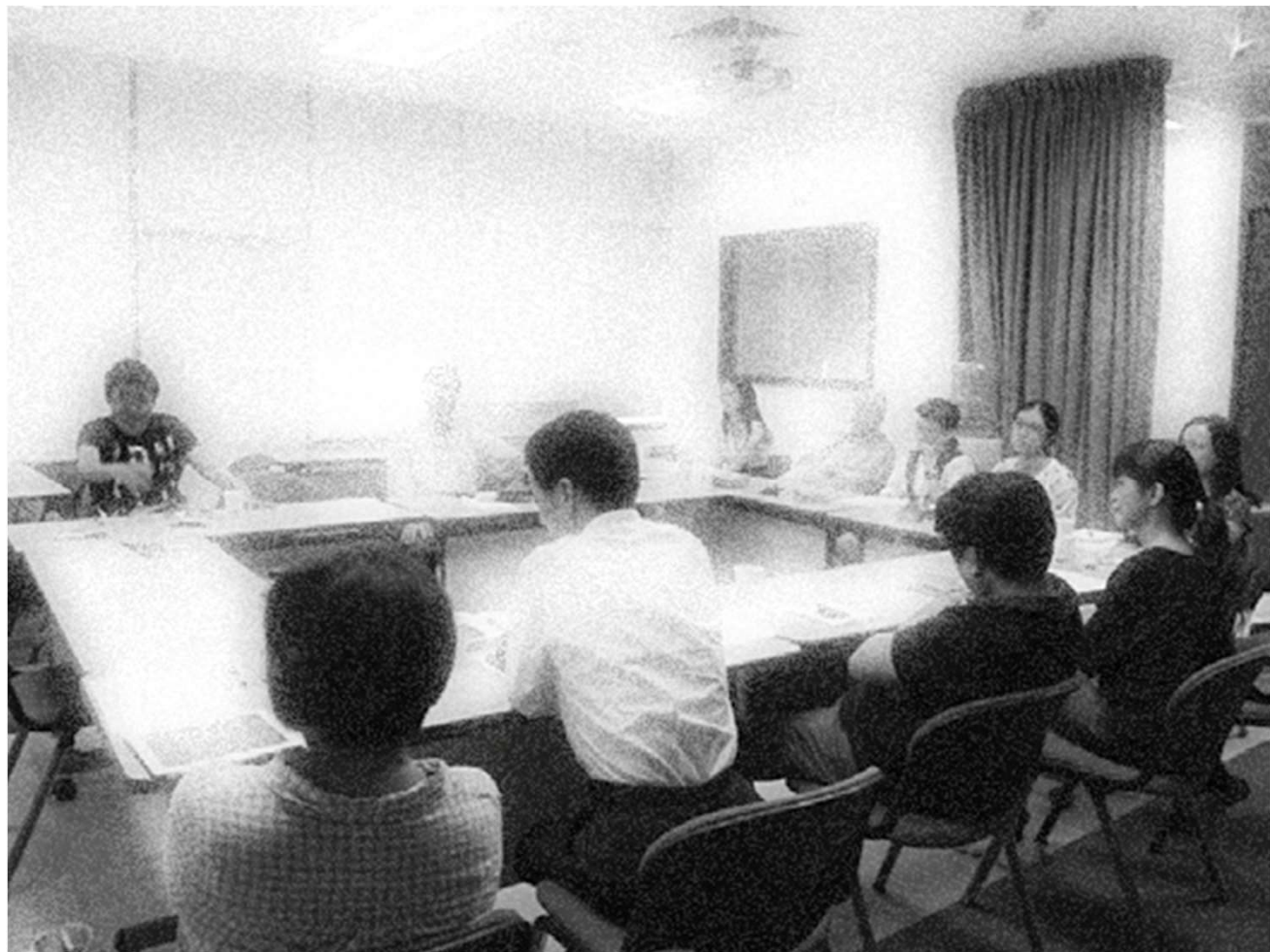
Questions & Discussion

Contact

joel.lehmann@equam.ch

076 393 99 50

EQUAM
FONDATION





Appendix: Carrying out an information needs analysis

Goal

Develop a blueprint for practical information.

End result:

- Fact sheets/ PowerPoints / scorecards/ dashboards / bulletins that contain relevant information and are high in demand
- Information products that present messages in a way that is easy to understand and to use for deliberations and decisions
- No fluff.

Information Needs Assessment Research Questions

1. What does the user want / what is her interest?
2. What does she need to do to achieve it?
3. What are potential threats or obstacles?
4. What are potential opportunities?

Relevance

5. What does she already know?
6. What does she not know?

Novelty

7. Will the information be used for “executive” decision making or as an input for joint decision-making?
8. Where and when does she currently obtain information?
9. How can she/they optimally absorb a message?

Information delivery

Methods for INA data collection

- **Quick and dirty** (but better than nothing): **Thought experiment**
- **Lightweight: Online Survey** (standard question bank?)
- **Deep: Qualitative in-depth discussions** (discussion guide template?)
- **Enhanced:** Observation of real-live information seeking / retrieval

Outputs

- 1. A list of specific information users (individuals and groups)**
- 2. A page of “meta information” for each information user**
 - Situational information needs (threats and opportunities)
 - Directional information needs (options, recommendations, instructions)
 - Preferred information delivery method (*see next slide)
 - Date (time) of information need
 - Person responsible to generate or retrieve the information
 - Data sources & data collection requirements

Information delivery methods

Format

Situational information: Real-time dashboards, scorecards, maps, data-stories

Directional information: Options, scenarios, recommendations

Display type

Table, Graph, Text

Communication channel

Verbal (PowerPoint), Print, Phone (SMS, WhatsApp), Screen

Concrete steps of an information needs analysis

- 1. Identify the content producer(s) (individuals)**
- 2. List information users (individuals, groups)**
- 3. Conduct information needs assessment for 1-2 priority users**
- 4. Re-assess which data & analytics can produce the required information**
- 5. Tailor information products according to the blueprint**
- 6. List data gaps**

Participant exercise

(thought experiment on information needs)

1. Think of someone who might need information.
2. What does he/she want?
3. What are potential threats or obstacles?
4. What does she already know?
5. Will he/she make a decisions alone, or together with others?



Appendix II

Typical patient surveys

Real-life experience with patient surveys

Context

- **Mandated:** ANQ
- **Mandated:** EQUAM (or mehrFacharzt)
- Research studies
- Quality department (hospital)
- Marketing department

Methods

- Paper-Based pre- or post consultation
- Physical mail to patients
- Fix installed Tablets (“Smiley-Stations”)
- ANQ
- QR-Codes

Real-life experience with patient surveys

Instruments

- Homemade-Questionnaires
- Ratings (Google Maps, other online platforms)
- Validated surveys

Feedback

- None
- Online Dashboards
- PDF-Reports

Key messages to information visualizers

1: Minimize the ink

- **De-clutter**
(lose “chart junk”)
- **Minimize redundancy**
- **Minimalist use of colour**

2: Make it easy

- **Guide attention**
effortlessly
- **Label chart elements**
directly
- Provide a strong **headline**
- Use a **familiar or intuitive** visual language

3: Provide context

DIKW-Pyramid

Factual content

A true representation of the world
in a communication medium

KNOWLEDGE



Data

Any representation of the world in a machine

Knowledge

A true representation of the world in a human

DATA

Contexts

Scientific research

Performance evaluation (comparative)

Politically-oriented research

vs.

Operational research

(internally funded, for optimization)

Applied research

(contracted projects, e.g. policy-related)

Routine data