The “How” Matters: Exploring Customer Satisfaction

AIRS I&R TRAINING AND EDUCATION CONFERENCE
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Introductions

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Wisconsin

Aging & Disability Resource Centers

Statistics - Wisconsin

Population Estimate 2010

5,686,986

41 Aging & Disability Resource Centers

9 Tribal Aging and Disability Resource Specialists

ADRC Contacts

Over 540,355 (2015)
History of WI’s ADRC Research Studies

- **2008**: I&A 18 ADRCs, N=1619
- **2009**: I&A 33 ADRCs, N=2308
- **2010**: Enrollment N=655
- **2011**: Wait List N=300
- **2012**: Benefit Specialist N=427
- **2013**: Pre-test N=278
- **2014**: Post-test N=179
- **2015**: Private Pay, N=432
- **2016**: Care-giver N=603
- **Survey of 41 ADRCs N=4453**
- **Enrollment Study II N=800**
- **VA Study N=31**

Total of 11,286 Customers surveyed!
Methodology

- Analysis
- Staff Interviews
- Customer sampling strategies
- Pretesting the Survey
- Survey Interviewing
Results over time

Overall, how would you rate your experience with the Resource Center?

- Excellent
  - 2008: 3.25 (N=1575)
  - 2010: 3.27 (N=3801)
  - 2015: 3.65 (N=4293)

- Good
  - 2008: (N=1575)
  - 2010: (N=3801)
  - 2015: (N=4293)

- Fair
  - 2008: (N=1575)
  - 2010: (N=3801)
  - 2015: (N=4293)

- Poor
  - 2008: (N=1575)
  - 2010: (N=3801)
  - 2015: (N=4293)

- No significant difference between 2008 and 2010
- Significant increase between 2010 and 2015
Almost” (.1) significant difference between 2008 and 2010, significant increase between 2010 and 2015
Results over time

The ADRC made it easy to access the information I needed

- Excellent
  - 2008: 3.1 (N=1575)
  - 2010: 3.2 (N=3756)
  - 2015: 3.8 (N=4002)

- Good
- Fair
- Poor

- Steady, significant increase.
Results over time

Would you recommend the ADRC?

- 2008: 80.0% (N=1589)
- 2010: 87.5% (N=3843)
- 2015: 97.0% (N=4350)

- Steady, significant increase.
- Not much room for improvement.
## What We Learned:
Domains of Customer Satisfaction

<table>
<thead>
<tr>
<th>Domain</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accessibility</strong></td>
<td>- Ability to find the phone number, get to the office and access the ADRC</td>
</tr>
<tr>
<td><strong>Culture of Hospitality</strong></td>
<td>- Returning calls promptly, privacy</td>
</tr>
<tr>
<td><strong>Knowledge</strong></td>
<td>- Both range and depth on a wide variety of issues</td>
</tr>
<tr>
<td><strong>Personalization</strong></td>
<td>- Filtering irrelevant information so as not to overwhelm</td>
</tr>
<tr>
<td><strong>Guidance</strong></td>
<td>- Help in applying information to particular situation</td>
</tr>
<tr>
<td><strong>Empowerment</strong></td>
<td>- Putting the customer in the driver’s seat</td>
</tr>
</tbody>
</table>
Professional Practice – Getting Ready!

New Staff

- Recruitment
- Orientation
- Initial learning

- Community
- Peer group

- Expectations
- Coaching
- Documentation
Customers – ADRC Experience

Valued Experience

Accessibility & Culture of Hospitality
- Welcome
- Role
- Confidentiality

Personalization & Knowledge
- Discovery
- Researching options
- Decision support

Guidance & Empowerment
- Next Steps
- Follow-up
# Professional Practice – The How

## Knowing the population
- Private pay
- Caregivers
- Enrollment
- Veterans

## Think strategically for different kinds of conversations
- By topic/need
- By customer type
- By PERSON

## Additional Strategy
- Follow up
- Home Visits
- Referrals to Community Resources
### Customer Service for Customers at a Variety of Starting Points

<table>
<thead>
<tr>
<th>Source of Information</th>
<th>Overall Experience</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>No other source of information</td>
<td>3.67</td>
<td>2624</td>
</tr>
<tr>
<td>Attorney</td>
<td>3.67</td>
<td>21</td>
</tr>
<tr>
<td>Doctor or healthcare provider</td>
<td>3.65</td>
<td>155</td>
</tr>
<tr>
<td>Internet</td>
<td>3.64</td>
<td>405</td>
</tr>
<tr>
<td>Advice of friends or family</td>
<td>3.49</td>
<td>164</td>
</tr>
</tbody>
</table>

**Overall Experience by Other Sources of Information**

- Poor: 1.0
- Fair: 1.5
- Good: 2.0
- Excellent: 4.0
Growing Use of Follow Up

Rate of Follow-ups

- Steady increase over time.
- About 5% over each 2-2 ½ year period.
Helping Customers Stay in their Homes

The ADRC helped me to stay at home in a situation where I might otherwise have gone to a nursing home or assisted living.

- Yes, 29.6% (759 individuals)
- No or Not Applicable, 70.4%

Satisfaction with home visit
- Satisfied, 98.4%
- Dissatisfied, 1.6%

N=2,565
Domains Over Time

**Personalization**
- **2008:** Excellent 3.0
- **2010:** Good 3.2
- **2015:** Excellent 3.0

**Accessibility**
- **2008:** Excellent 3.2
- **2010:** Good 3.2
- **2015:** Excellent 3.5

**Culture of Hospitality**
- **2008:** Excellent 4.0
- **2010:** Good 2.9
- **2015:** Excellent 3.0

**Knowledge**
- **2008:** Excellent 3.2
- **2010:** Good 3.2
- **2015:** Excellent 3.6

**Guidance**
- **2008:** Excellent 3.2
- **2010:** Good 3.3
- **2015:** Excellent 3.8

**Empowerment**
- **2008:** Excellent 3.5
- **2010:** Good 3.2
- **2015:** Excellent 3.5
Wrap up

Nuanced approach to customers that is based on their needs

Importance of key elements

Impact of ADRC services
Resources and Contact Information

Here is a link to the published reports:
https://www.dhs.wisconsin.gov/adrc/pros/index.htm

And this is a link to the coaching tool for options counseling:
https://www.dhs.wisconsin.gov/adrc/pros/opsguide-6-options.htm

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