

APPENDIX A: STORYBOARD TEMPLATE



LOCAL HEALTH DEPARTMENT NAME: Summit County Health District

ADDRESS: 1100 Graham Road Circle, Stow, OH 44224

PHONE NUMBER: 330-923-4891

SIZE: 110 employees, 89 full time and 21 part time

POPULATION SERVED: 297,303

PROJECT TITLE: Improving the Transfer of Telephone Calls from the Public

PLAN
Identify an opportunity and Plan for Improvement

1. Getting Started

The nine staff members who attended the QI workshop reflected all departments of the Summit County Health District. They agreed that optimal telephone customer service was an agency wide goal, but was not always achieved due to a variety of human and mechanical issues. These perceptions were not based on any hard data but reflected experiential information from dealing with angry citizens.

Project Aim: There will be a 10% increase in correctly transferred calls received from the public to the proper location and /or person.

2. Assemble the Team

The nine member team who attended the workshop was identified as the Planning Team. They included representatives from all three divisions in the Health District, (Policy and Planning, Environmental Health, Nursing Division) as well as Administration.

3. Examine the Current Approach

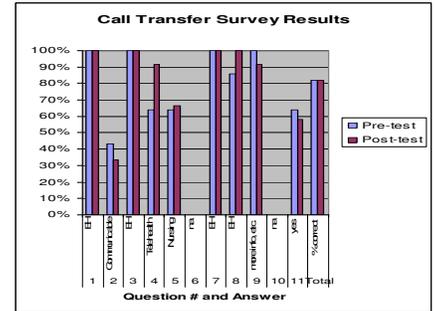
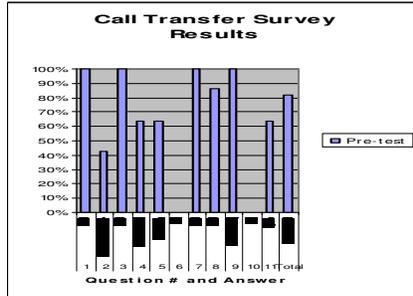
The Planning Team initially used brainstorming to identify aspects of and possible causes of misdirected phone calls. Forty different ideas were identified. Using the Fishbone Diagram helped the team more clearly visualize potential causes. Areas defined included five different areas:

Customer service issues, Number of available staff to answer calls, System issues, Customer/Caller issues and Staff issues: knowledge/education.

The group decided to focus first on Customer Service issues which included busy staff transferring calls to the wrong place.

4. Identify Potential Solutions

The Planning Team decided to survey the 14 personnel identified by the Team as the most likely to receive calls from the public with a list of typical questions asking them where they would transfer each call. A non supervisory member of the team was delegated to conduct the survey with each participant in person to standardize the process. The initial survey showed that the staff was able to correctly identify where to transfer calls 82% of the time.



5. Develop an Improvement Theory

The results of the survey were shared with the Planning Team. They decided that there was need to establish a smaller Project Team consisting of a representative from each of the four areas receiving a high volume of calls: Front Desk, Environmental Health, Nursing Division and Clinic. The Project Team, mentored by 3 members of the Planning Team, developed a single page reference for transferring their perception of the typical calls received.

Improvement Theory: Staff equipped with the proper resources will appropriately transfer customer phone calls.

DO
Test the Theory for Improvement

6. Test the Theory

The 4 members of the Project staff piloted their single page reference sheet for one week in July, 2008. They encountered no problems with the tool. The tool was then shared with the remainder of the support staff (14) who receive the majority of calls from the public to pilot for 2 weeks in early August 2008.

CHECK
Use Data to Study Results of the Test

7. Check the Results

The same survey used initially was re-administered to the staff using the same method as a post test. The results showed the same rate of 82% correct responses. However there were differences in individual question responses. Some had increased but some had decreased.

ACT
Standardize the Improvement and Establish Future Plans

8. Standardize the Improvement or Develop New Theory

The Planning Team's goal of increasing correctly transferred calls received from the public to the proper location and /or person was not achieved. The team met to discuss the findings. Implementation mistakes were recognized and discussed. There was recognition that the problem had not been resolved. Ideas and hypothesis from the planning team may have not been true. The Planning Team felt the PDCA cycle needed to be repeated but should be done with the entire support staff as they all encountered the public. The goal continued to be the same.

Project Aim: There will be a 10% increase in correctly transferred calls received from the public to the proper location and /or person.

9. Establish Future Plan

Two members of the Planning Team met with 11 members of the support staff in October 2008. The identified problem and PDCA process to date were explained to the group. There was group discussion of possible causes and solutions. It was decided that each of the four areas had unique issues. It was decided that each group was to meet individually with a mentor from the Planning Team to detail a plan for handling customer calls. After each small group had met, the larger group would be convened to develop a agency plan and continue this cycle of PDCA. This process is presently underway.