



**Goal:** Help staff to recognize the importance of keeping patients, family members and other customers informed.

**Materials:** Handout – “Anatomy of a Great Face to Face Explanation”

**Activity:** Talk with staff about the importance of keeping people informed.

Talk about the importance of explaining what you are doing and what people can expect. People are less anxious when they know what is happening.

Patients do not generally use health care services expecting to have a good time. More often than not, patients are anxious and frightened, and some even fear the worst. All too often, what will happen to them seems like a big, sinister mystery. The fact is that most patients have lots of questions. For example: “Will it hurt?” “What will you do?” “Will I need tests?” “Can I eat before the procedure?”

Often, patients do not bring up their questions because they do not want to appear stupid or they don’t want to bother us. Patients need to know what to expect and whenever possible, you should anticipate their concerns and tell them.

Helping patients, families, physicians and co-workers know what to expect and what is being done on their behalf lessens their anxiety. It also lets people know that you care about their needs, want to help them, and respect their need to know.

Some guidelines for developing an explanation protocol for situations where you need to explain things to your customer face to face are listed in the handout.

(Source: Customer Service for Professionals in Health Care by Wendy Leebov, Ed.D)

## ANATOMY OF A GREAT FACE TO FACE EXPLANATION

1. Investigate. Find out specifically what customers need to know and why; find out what they already know.
2. Explain.
  - If it can be simple and short, simply tell them what they need to know.
  - If the explanation must be longer or more complex, give an overview. Tell them what you'll tell them before you tell them, so they can prepare their minds for the detailed explanation to come. Then give the details.
  - Finish by reviewing the main points.
3. Check back for understanding.
  - Find out what is unclear, making it easy for people to ask questions. Example: "I realize this can be a lot to grasp at once. Is there any way I've confused you or did you clearly understand what I was saying?"
  - For long explanations, check back along the way. Don't wait until the end.
  - Watch for nonverbal cues that signal inattention or confusion---looking away, fidgeting, a blank stare, a wrinkled brow. If you notice these, invite feedback. Example: "You look confused. Have I left anything unclear?"
4. Answer "Now what?"
  - Identify the next steps: what they can expect, what you will do, what others will do, what they need to do and when.
  - Reinforce the explanation with something they can take with them (appointment card, checklist, pamphlet, directions, map, video)
  - Consider follow up. Does the customer need more information at another time? If so, tell him or her how you will follow up and when. Then follow up as promised.
5. Open the door to further communication. In case customers have questions later, encourage them to contact you or another appropriate person and tell them how they can do so easily. Example: "Please don't hesitate to call me any time; here's my number."
6. Show you care.

"Hope your surgery goes well!"

"I hope this isn't too much trouble. I really appreciate you getting me this information."

"It was good to see you/talk to you again."

"Thank you."

**Simply Extraordinary**

(Source: Customer Service for Professionals in Health Care by Wendy Leebov, Ed.D)