

## **Train the Trainer Series**

### **C.L.E.A.R./H.E.A.T. Activities**

#### **Table of Contents**

**2 Video: “Five Star Service is C.L.E.A.R.”**

**3 H.E.A.T. Case Studies**

**4 Generic Training Activity: Brainstorming**

**5 Generic Training Activity: Discussion groups**

**6 Generic Training Activity: Case Studies**



**SPECIFIC COURSE ACTIVITIES: for the C.L.E.A.R. Presentation – In-Person or Virtual**

Instructions: Video Presentation:

- The activity will be to watch the video: “Five Star Service is C.L.E.A.R.”
- Prior to the viewing of the Video, ask your staff to:
  - “Write down what types of customer service we provide for our patients?”
  - Examples: morning and afternoon greetings, clean waiting rooms, visit summary sheets, etc.
- Watch the video
- After watching the video, ask your staff:
  - What behaviors did the presenter note as CLEAR Customer Service that we do in our offices?
  - And please note those behaviors we do NOT do in our offices?
- See if there is a correlation between what your staff does and the video presentation.
- Identify the behaviors or processes that need improvements.

## SPECIFIC COURSE ACTIVITIES: for the H.E.A.T. Presentation – In-Person or Virtual

Instructions for H.E.A.T. Case Studies:

- The best activity dealing with difficult situations and angry patients is the sharing of specific events that occurred at your facility with your staff and patients.
- Here is where you could take one or two specific incidents that occurred in your group and highlight the following:
  - What happened?
  - Who was involved?
  - Did anyone get hurt?
  - How was the situation resolved?
  - What key items were learned from the incident?
  - What safety policies or procedures were instituted to handle potentially dangerous events?  
Example: calling 911, removing the troubled patient from the waiting room, removing any objects that may be used as weapons (vases of flowers, magazine holders, bottles of hand sanitizers), etc.
  - What training should have resulted or did result from the event's outcome?
- **An Example Situation:**
  - During the latter part of the day, a patient (female, roughly late 60s) came into the office with what appeared to be a newly casted left arm. She approached the counter and when asked how she could be assisted, the patient lost her temper and started screaming at the front office staff.
  - The staff asked her for her name but were met with resistance. She yelled at them, *"You know who I am and I need to see my doctor right now!"* The front office staff tried to explain that they could not remember her name and would appreciate it if she would remind them. The patient started to throw things off the counter to the floor and yell, *"I need to see the doctor right now!!!"*
  - At that point, one of the front office staff members rushed to get the office manager. The manager also tried to see if she could get the patient to identify herself but was unsuccessful.
  - Thirty minutes later, the patient finally left, leaving the office in shambles.
  - Two weeks later, the patient arrived back in the office for a 9:00 am appointment. The front office staff recognized her immediately and went into action. They took all the items off the counter and went to get the office manager.
  - But this time, the patient came in, signed in, was pleasant, and did not even recall that she had come in 2 weeks prior. The staff was totally confused, until the daughter of the patient arrived and apologized for her mother's behavior. She stated that the pain medication given to the patient by the ER doctor caused her to have such a horrible reaction.
- **A Possible Solution:**
  - Due to this event, the office manager put together a safety manual and trained the staff on how best to handle similar situations.

*This was a real life situation that was shared by one of SCAN's groups.*

There are additional examples within the Trainer's Notes.

## Generic Activities: Brainstorming Activity

Instructions: Brainstorming

Purpose: Encourage new ideas, new ways of doing things, and being creative or thinking “outside of the box”.

1. Facilitator Role
  - Define your problem, issue or challenge
  - Give a time limit or idea limit
  - Encourage everyone to participate
  - Record ideas
    - Be brief, but try to use participant’s words
    - Put a check mark when ideas are repeated
2. Brainstorming Rules
  - Shout out ideas quickly
  - Think fast; reflect later.
    - Keep ideas short and simple
    - The more ideas, the more potential solutions
  - No discussion during brainstorm ... ideas only
    - No criticizing, arguing, agreeing or evaluating.... No discussion
  - Hitchhiking – build on other ideas for inspiration to create new ideas
3. Concluding the Brainstorm
  - Facilitator:
    - Reads the list of ideas
    - Ask if there are any additions or corrections
  - Group:
    - Chooses the top 3 – 5 ideas
  - Facilitator:
    - Make sure everyone participates
    - Circles the top ideas

## Generic Activities: Discussion Groups

### Instructions: Discussion Groups

1. Be inclusive
  - Allow individual introductions
  - Share objectives, expectations or intentions of the discussion
  - Get clarification, if needed, on participant questions or comments.
  - Treat participants with respect and consideration.
  - Give time for participants to gather their thoughts and contribute to discussions.
  - Provide opportunities for participants to pair-share.
2. Discussions should be constructive and positive
  - Establish ground rules
  - Try to keep the group on task without rushing them
  - If the group starts to veer in the direction of negativity and/or pointless venting, ask them how they would like to address this
  - Step back when a group is functional/functioning – help participants become independent learners; take control of their learning
3. Encourage participation
  - Capture participants' comments on a whiteboard
  - Ask follow-up questions, and paraphrase comments for all to think about
  - Incorporate previous contributions into the conversation
  - Encouraging others to add their reactions or ideas to build on someone's comment.
  - It's okay if you don't know – invite others to provide resources
  - Discomfort and silence are ok; it allows participants time to think

## Generic Activities: Case Study

Instructions for drafting a Case Study:

1. Introduction
  - Identify the key problems and issues in the case study.
  - Formulate and include a thesis statement, summarizing the outcome of your analysis in 1–2 sentences.
2. Background
  - Set the scene: background information, relevant facts, and the most important issues.
  - Demonstrate that you have researched the problems in this case study.
3. Alternatives
  - Outline possible alternatives (not necessarily all of them)
  - Explain why alternatives were rejected
  - Constraints/reasons
  - Why are alternatives not possible at this time?
4. Proposed Solution
  - Provide one specific and realistic solution
  - Explain why this solution was chosen
  - Support this solution with solid evidence
  - Concepts from class (text readings, discussions, lectures)
  - Outside research
  - Personal experience (anecdotes)
5. Recommendations
  - Determine and discuss specific strategies for accomplishing the proposed solution.
  - If applicable, recommend further action to resolve some of the issues
  - What should be done and who should do it?