

ACTION Campaign

Promising Practices



Improving Client Engagement

*Make the Clients Feel More Welcome
Action Guide*

ACTION CAMPAIGN
Making an Impact on Addiction Treatment and Recovery



Make the Clients Feel More Welcome

Purpose: to help you identify ways to better engage new clients by improving their first impression of your organization.

Introduction: If you are in recovery, you probably remember your first treatment appointment or first self-help group meeting. Walking in may have taken all the courage you could muster. If you are not in recovery, you may remember your first day in a new school or a new job. That first day can be frightening and bewildering, and it's a relief when someone finally greets you and offers to be your guide. Our clients feel the same apprehension as they walk in the treatment center doors. The more welcoming we can be, the more likely they are to come back.

Plan: Make an appointment at your treatment program as though you were a potential client. When you walk in the door for your appointment, what is your experience? What does the waiting room look like? How are you greeted? Are you asked personal questions in a public area? Identify what makes you uncomfortable. These are the areas you may want to change. It may also be useful to convene a group of current clients and ask them what they liked and didn't like about their first face-to-face experience with your treatment program. Document what percent of clients come back for a first counseling appointment after their initial intake/assessment appointment.

Do: Pick one of the things that you or your clients identified as something that needs to change. Many agencies have made changes to spruce up their waiting rooms, to provide coffee or snacks, and to make sure that everyone that enters is personally greeted in a friendly, supportive manner. Some agencies have made sure that clients get a tour of the facility and are introduced to available staff. Whatever change you pick, implement it for a few weeks and document the percent of clients who return for a first counseling appointment.

Study: Did the change have an impact on the number of clients who return after their first visit? If so, continue to implement the change and identify which change you will make next. If not, decide whether the change needs to be tweaked and retested, or whether a different change may have a better impact. If there was no impact, discuss why this may be with staff and clients. Maybe you need to remove bigger barriers before the change you made can have an impact. Sometimes when a change to make the facility more welcoming doesn't have an impact, another issue like scheduling may be a larger factor influencing the number of people who return for appointments.

Act: Implement your successful changes and test additional changes that will make people who come to your treatment program feel more welcome. Remember to implement one change at a time for a brief period of time and to measure the impact that change has on your program. Submit your data on the ACTION Campaign Web site.





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Measuring the Impact of Change: The length of time necessary to test a change will vary depending on an agency's size. Scientifically, the preferred sample size is at least 40 clients. However, since you are testing a hypothesis, what you need are just enough clients before and after the change to see a trend. Pilots should not last more than a month, or they tend to lose their pilot status. We recommend that you run your change project pilot long enough to have at least 20 clients experience your new way of operating. For smaller agencies, depending on the change, this may take a month. Larger agencies probably should run a change for at least a week, even if that gives a sample larger than 40.

Practice Measure: Number of assessments with a first counseling session-post assessment (measured by looking at the number of actual assessments versus with a first counseling session).



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Action Campaign Metrics Evaluation Tool

Agency Name _____

Level of Care _____

Action Promising Practice _____

Tool for Tracking Kept Assessment Appointments by Week

Instructions:

1. Enter an agency generated unique client identifier (A).
2. Enter the actual date of the assessment appointment (B).
3. Indicate if the client actually kept their appointment for the next counseling session (Yes/No) (C).
4. Optional: If you wish, you may also record the date of the actual next counseling session (D).
See example below.
5. At the end of the project, summarize the number of clients with an assessment (B), number of clients who kept their next scheduled counseling session (C) and calculate the % of clients with an assessment who made it to their next counseling session (Sum of C/Sum of B).
6. Optional: You can also calculate the elapsed time between the next counseling session and the assessment (D-B) and then calculate an average time between these two dates.
7. For multiple cycles, please use a separate form for each cycle.

Client Identifier (A)	Date of Client Assessment (B)	Did the Client Return for the Next Counseling Session (Yes/No) (C)	Optional: Date of the Next Counseling Session (D)
A0003	9/3/07	Yes	9/7/07



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Perinatal Treatment Services

Seattle, Washington
www.ptswa.org

Perinatal Treatment Services (PTS) is a residential and outpatient substance abuse treatment program for pregnant and parenting women (PPW) and adolescent females. The long-term PPW residential program is designed for women at or below the poverty level who suffer from addiction, often have mental health issues, have experienced domestic violence, and are in need of parenting education and skill support. The women and their children (under the age of six years) stay with us for up to 180 days.

Project Aim Increase Continuation
Change Leader / Executive Sponsor Kay Seim

Goals & Measures

PTS joined NIATx in September of 2003 in a state of crisis. Its long-term residential treatment program for pregnant and parenting women was only four months into the fiscal year, with a net loss of \$140,000, a 60 percent continuation rate through the first four units of service, and occupancy rates below 50 percent. Kay Seim, the Executive Sponsor of Perinatal Treatment Services, engaged in a walk-through exercise to experience the treatment process through the eyes of the customer.

The walk-through of the admission process revealed that it was extremely impersonal. It was conducted in a public area, was far too long, and was interrupted several times to deal with other client issues. The client was shown to a room that was not ready, and left there with no further directions on what to expect from that point forward.

Changes Implemented

Based on the results of the walk-through exercise, PTS formed a rapid-cycle change team to improve the customer experience, then implemented the following changes:

- Greeting clients by name, saying "We are so glad you are here" when they enter the reception area
- Establishing a private admission office
- Offering refreshments during the admission process
- Having the Program Manager and Primary Counselor introducing themselves to new client during the admissions process
- Introducing a "Peer Sister" program to mentor new clients through orientation to program
- Calling a "Community Meeting," introducing new clients to all the residents, and giving them "Bravery Awards" for entering treatment



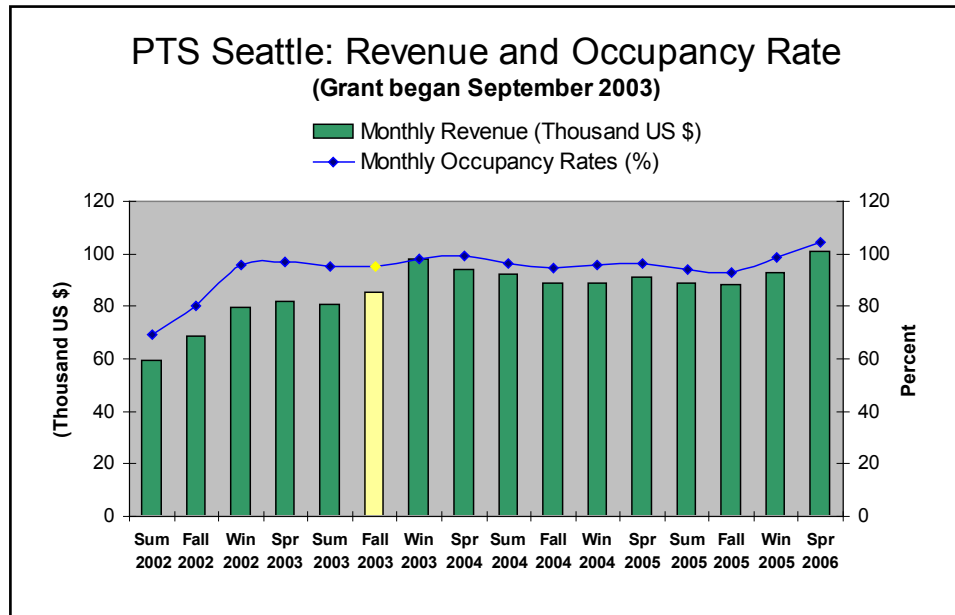
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Business Case Impact

The Change Team was able to implement changes that led to an improvement from 60 percent to 85 percent continuation through the first four units of service. Now, occupancy is near 100 percent. Best of all, the link between continuation rates and revenues means that the program has improved from average monthly revenues of \$60,000 in 2002 to more than \$100,000 in FY06. The program is now squarely "in the black."

Lessons Learned

Experiencing treatment through the eyes of the customer is crucial. Improving the customer experience yields greater engagement in treatment, with corresponding increases in revenue. The changes made in this project mean that more women are getting the help they need, and the organization is operating with a consistently positive margin. Everyone is happy!





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Additional Success Stories Making the Clients Feel More Welcome

Agency	Level of Care	Change	Action Impact
Central New York Services ¹		Environmental Changes	See Case Study for results
Fayette Companies ²	Residential	Call Family on 1 st Night Peer Support; family involved in admission process	Reduced 48 hour AMA from 12 to 5%
Norman Adolescent Center	Residential	Engaged family in intake process Changed the environment	Increased average daily census from 14 to 19.5
Perinatal Treatment Services ³	Residential	Environmental changes	See case study for results
Vanguard Services ⁴	Residential	Create a client-driven welcome committee	Reduced unplanned discharges in 1 st 14 days from 11 to 6%

¹ <https://www.niatx.net/PDF/PIPractice/CaseStudies/CNYS%20-%20FINAL.pdf>

² <https://www.niatx.net/PDF/PIPractice/CaseStudies/Fayette.pdf>

³ <https://www.niatx.net/PDF/PIPractice/CaseStudies/PTS-FINAL.pdf>

⁴ https://www.niatx.net/PDF/PIPractice/CaseStudies/CaseStudy_Vanguard_ResidentialRetention_0306.pdf