

Gaining Customer Knowledge Clinical Microsystem Interview Worksheet

Aim: Continue to build customer knowledge to lead to improvements in health care.

Interview #____: Facts

Today's Date: _____
Patient Name/Initials: _____
Family Member Name/Initials: _____
Microsystem Name: _____
Provider Name/Initials: _____
Permission Obtained: _____
Time Interview Started: _____
Time Interview Ended: _____
Aim of Interview: _____

Tips

1. Eye contact
2. Comfortable environment
3. Consider audio/video taping
4. Follow clues... eg "High quality... what would that look like? How would you describe quality?"
5. Observe body language and facial expressions

Note Taking Tips

1. Discuss note taking with interviewee
2. Take notes regularly and promptly
3. Try "close" to verbatim note taking
4. Don't let note taking interfere with ability to listen and ask questions

Steps for Doing Interviews

1. **Aim.** Set the aim and frame the key question(s).
2. **Who.** Determine who will be interviewed and how they will be invited to participate.
3. **Plan.** Who will conduct the interviews, in what setting and with what tools and training? How will the results be recorded & analyzed?
4. **Interviews.** Conduct the interviews using an interview guide.
5. **Analysis.** Analyze the content of the results to identify the response patterns that provide answers to your key question(s).
6. **Summarize.** Reflect on you analysis and summarize the results. Consider doing this by using "major results" that are linked to actual verbatim statement contained in the interview notes.

Steps of an Individual Interview

- Preflight
 - Review your aim & interview guide
- Taking Off
 - Establish purpose with respondent and rapport and appreciation for their participation.
- Flying
 - Work your way through the interview guide covering the main topics and exploring promising leads and asking questions to clarify and to probe.
- Landing
 - Ask your final question and remind the respondent of how results will be used and thank him for participating.
- Debriefing
 - Reflect on how the interview went
 - What might be done to improve the process and the method before conducting the next interview

Gaining Customer Knowledge Clinical Microsystem Interview Worksheet

⑤

Interview Guide Template

Preflight

- Interview who, where, under what auspices, with what guide, for what purpose

Taking Off

- Introduce self, purpose of interview, how information is to be used, assure confidentiality, ask any questions and ask permission to proceed with the interview.
- First question . . . Write an open-ended question that invites the respondent to tell his/her "story" re: topic of interest . . .

My first question is: _____

Flying

- Frame several "core" questions to achieve your aim and answer key questions.

1. _____
2. _____
3. _____
4. _____
5. _____

Landing

- Last question . . . Write summative last question. . .

My last question is: _____

- Thank respondent and say goodbye.

Debriefing

- If taking notes . . . Review news and add to them to make as complete a record as possible
- Consider what new learned by this interview
- Consider refinements to interview guide based on what was learned

Gaining Customer Knowledge Clinical Microsystem Interview Worksheet

⑤

Interview Guide Template

Preflight

- Interview who, where, under what auspices, with what guide, for what purpose

Taking Off

- Introduce self, purpose of interview, how information is to be used, assure confidentiality, ask any questions and ask permission to proceed with the interview.
- First question . . . Write an open-ended question that invites the respondent to tell his/her "story" re: topic of interest . . .

My first question is: _____

Flying

- Frame several "core" questions to achieve your aim and answer key questions.

1. _____
2. _____
3. _____
4. _____
5. _____

Landing

- Last question . . . Write summative last question. . .

My last question is: _____

- Thank respondent and say goodbye.

Debriefing

- If taking notes . . . Review notes and add to them to make as complete a record as possible
- Consider what new learned by this interview
- Consider refinements to interview guide based on what was learned

ANALYSIS AND INTERPRETATION

- ⑥ **Aim:** Based on your observations and interviews (and other information) use value compass thinking to summarize the patients & family's view of the features of care and service that contribute to the "goodness" (or "badness") of outcomes and process.

Tips. Value Compass

Purpose: To identify features of care that contribute most to the patients perception of overall "goodness".

1. Select a clinically significant population.
2. Conduct observations of patients receiving care.
3. Start with east (satisfaction) on the compass and go counter-clockwise around the compass.
4. List features that contribute to perception of "goodness".

Tips. Process Map

Purpose: To map patient's view of steps in process.

1. Start by listing basic steps in patient's journey.
2. List features of care at each step that drive perceptions of "goodness" List the key quality characteristics for each step.

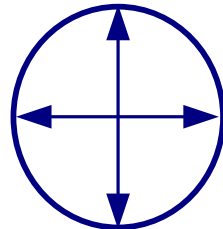
OUTCOMES → Identify features of care that patient's perceive as contributing to its "goodness" in meeting their wants and needs

Functional

- Physical function _____
- Mental health _____
- Social/Role _____
- Other (eg, pain, health risk) _____
- Perceived well being _____

Clinical

- Morbidity _____
- Complications _____
- Signs _____
- Symptoms _____
- Side Effects _____



Satisfaction vs Wants/Needs

- Health care delivery _____
- Perceived health benefit _____
- Delights _____
- Disappointments _____
- Problems _____

Costs

- Direct medical _____
- Indirect social _____

⑦ Process Map

