

MEETING AGENDA

Taking Action on Client Satisfaction

Date of Meeting: _____ Reporting Period: Beginning Date: _____ Ending Date: _____

In preparation for this review, you will need your latest HCP Experience Management Monthly Satisfaction Report. Use this presentation in your monthly review to new feedback, identify your promoters, passives, and detractors.

Discuss as a team on what you did right and where improvements can be made.

At the end, you will have identified your focus for the next 30 days.

Improving The Client Experience - Discussion

Your Net Promoter Score (NPS) is a metric used to measure client satisfaction and the likeliness of a client recommending our agency to others.

Your score depends on the answers of your clients, grouping them into **promoters**, **passives**, and **detractors** based upon their individual responses. Use these scores to provide insights on how to approach referrals, who needs a little extra “wow” factor, and who is vulnerable to leaving.

1. Review your Net Promoter Score (NPS)

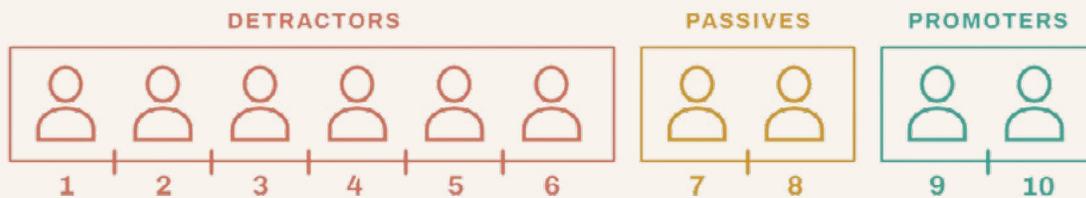
Your Latest NPS	Previous Month's NPS	The Industry's NPS

Net Promoter Score® is based on one question:

“How likely are you to recommend [company name] to others?”

It is rated on a scale of 1-10, 10 being “highly likely to recommend”.

Based upon the answer clients provide, they are categorized into three groups:



- Promoters (score 9-10)** are loyal enthusiasts who will keep using your services and refer others, fueling growth.
- Passives (score 7-8)** are satisfied but unenthusiastic clients who are vulnerable to competitive offerings.
- Detractors (score 1-6)** are unhappy clients who can damage your brand and impede growth through negative word-of-mouth.

To calculate your Net Promoter Score, take the percentage of clients who are promoters and subtract the percentage who are detractors.

2. Detractors

Detractors are unhappy clients who can damage your brand and impede growth through negative word of mouth. They are the respondents who gave a score from 0 to 6.

Looking at the list of detractors, brainstorm actions that focus on improving the client experience.

Some questions to ask yourself:

- Why are they dissatisfied?
- What are some positive actions to take?
- What is the end goal for the client?
- Who is responsible for taking action?

TIP: *They are not your enemy. This group can become the greatest source of learning and unbiased feedback. Some clients may have had an unsatisfactory experience outside of your control. Listen to what the feedback has to offer but know you can't turn every critic into a promoter.*

DETRACTOR Client Name: _____ Who's Responsible for Actions? _____

Why are they dissatisfied?	Positive actions to be taken	End goal for client

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Why are they dissatisfied?	Positive actions to be taken	End goal for client

3. Passives

Passives are the most exciting group. While they aren't yet dissatisfied, there is more room to win them over. They are the respondents who gave a score of 7 to 8.

Looking at the list of passives, brainstorm actions that focus on moving them into a promoter.

Some questions to ask yourself:

- Why are they passives?
- What is the end goal for the client?
- What are some positive actions to take?
- Who is responsible for taking action?

TIP: *When working with passives, look at their experience from every angle to find the root of the problem. Connecting with clients where they are at in their journey is key- ask them more questions and become involved in their experience.*

PASSIVE Client Name: _____ Who's Responsible for Actions? _____

Why are they dissatisfied?	Positive actions to be taken	End goal for client

PASSIVE Client Name: _____ Who's Responsible for Actions? _____

Why are they dissatisfied?	Positive actions to be taken	End goal for client

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PASSIVE Client Name: _____ Who's Responsible for Actions? _____

Why are they dissatisfied?	Positive actions to be taken	End goal for client

4. Promoters

Passives are the most enthusiastic and loyal clients. They are happy and often refer others. They are respondents who gave a score of 9 or 10.

Looking at the list of promoters, brainstorm some actions that focus on keeping them happy and obtaining their referrals.

Some questions to ask yourself:

- Why are they happy?
- What's the best method to asking for a referral?
- Who is responsible for taking action?

TIP: Promoters offer us insight into what is being done right. But they also can be pushed into a passive or even detractor if not cautious.

PROMOTER Client Name: _____ Who's Responsible for Actions? _____

Why are they a promoter?	How can we obtain more referrals from them?

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5. Top Priorities

A *Client Priority Index* focuses on the **two lowest category** scores received during the previous 90 days. These top priorities help your agency focus in on a specific area of your business that you can improve upon. The feedback from your clients will give you insight on what your next steps should be.

Remember, your agency is rated on five different categories: *Recommend Provider, Daily Life, Ability of Caregivers, Communication from Provider, and Client/Caregiver Compatibility.* Your *Client Priority Index* is looking at the lowest two of these categories.

Question to ask yourself - What will you do to improve this area?

	Priority Categories (See Priority Index Report)	Monthly Action What will you do to improve this area?
#1		
#2		

6. Proof of Quality

A *Client Strength Index* focuses on the **top two category** scores received during the previous 90 days.

Question to ask yourself - How can you best market these strengths to potential clients?

According to the 2022 HCP Benchmark Report, the top 3 marketing sources are: clients (past/current), word of mouth, internet.

	Strength Categories (See Strength Index Report)	Monthly Action - What can you do to promote and capitalize on your strengths?
#1		
#2		

7. Feedback Review

What are the top common comments identified for Detractors – Passives – Promoters?

Common comments - Detractors	What actions can you take to address and resolve the negative comments?

Common comments - Passives	What actions can you take improve the level of satisfaction?

Common comments - Promoters	How can you best utilize client testimonials to market potential clients?

8. Final Thoughts

Review any last thoughts about the feedback and ensure that each team member is equipped with their own actionable takeaways.

Gathering unbiased feedback is an opportunity that offers a unique client experience. This data and review process is designed to allow your agency to focus on what matters most, providing the best effective and efficient care possible.