

CASE STUDY

Outpatients Booking Teams Improvement Programme

Background

In December 2014 Meridian carried out an analysis in the Outpatients Booking Teams of a busy children's hospital. The hospital employs 2900, and offers integrated healthcare for children and young people from 0-16, Acute and specialist services – Emergency Department, Community & Wellbeing and Mental health Services. The project was a 14-week long programme and resulted in a significant reduction in the number of vacant clinic slots within a 6 week horizon looking forward. The installation of a robust and systematic activity planning and review process. Install management controls to ensure all new/follow up appointment slots full through hourly/daily planning and reporting.

Meridian worked with the management team within Outpatients through a series of meetings and workshops. During these various sessions a new management control system was designed to ensure effective running of the OPD Booking Team.

The key focus was to implement management controls to increase the number of bookings, and thereby increase clinic utilisation. This involved installing management controls to assign work to booking agents, as well as daily reviews on planned versus actual performance, and variance resolution. As well as a number of bespoke reports to give visibility about slot utilisation, and the number of daily bookings and cancelled clinics.

Study Findings

The analysis was a three week long study, where a total of 56 resource days was used. There were two booking teams the new and follow up. There had been historically little focus on ensuring that clinic slots were filled to the appropriate utilisation. The current OPD booking system showed a lack of control over activity, expectation, and performance.

The programme sold was a 14-week-long Outpatients Improvement Planning Project.

The overall goals of the project were as follows.

- Understand the booking process, and modify to increase efficiency
- Introduce performance management tools for the filling of clinic slots
- Install management controls to improve overall appointment delivery process, and to ensure all appointment slots are full
- Install performance management meetings

Results

The processes introduced and implemented gave the management of OPD better control over the proactive governance of the booking teams. As well as visibility on a daily basis of individual and team performance.

Daily, weekly, and monthly performance review meetings have been installed. Imbedding the planned versus actual review philosophy within the organisation.

The main results of the programme are:

- Introduction of a daily review "Huddle" meeting with Agenda – New & Follow -Up Team with Manager. This gets the booking staff together to review the previous day's activity, as well as setting out the plan for the day ahead
- Development of a Clinic Slot Utilisation Report. This report enables management to look forward up to the 6 week booking horizon, as to how many slots are available and the potential revenue available for the Trust. The report has enabled management to focus their efforts of the booking teams on filling slots for specific days / weeks.

Project



- Booking targets per agent per day were set – New Team: 110; Follow-Up Team: 90. These targets have been achieved, and have sustainability.
- Targets for abandoned calls were set at 10%, previously they hovered around 15% - 25%.
- A Variance Report was developed which compares the previous day's performance. It highlights targets and poor performance. It gives management the opportunity to document why the team had a good day or a bad day, and address variances.
- Flexing of resource between New & Follow-Up Teams during peaks call times. Showed a steep reduction in abandoned calls, by having cover in the right place at the right time.
- Setting back up assignments during times of low demand. This created more bookings as the follow-up team were tasked with making outbound calls.
- Monthly Management Schedule Review for senior management
- Zero tolerance on consultants taking holidays within the 6 week horizon. This reduced the amount of cancelled clinics, and thereby the amount of re-work for the booking agents.
- Weekly OPD Review meetings allowing senior management to review the booking team's performance and investigate variances.
- Savings were tracked on a weekly basis by the Trust and quantified the actual financial improvements for outpatients. By the end of the project, the planned financial improvement for OPD was £1,000,000. The total cumulative savings for OPD stood at £535,856.06. This equates to annualised savings of £3,483,063.
- A self-perpetuating management control system which uses actual outputs to inform the future plan.

- Perpetuated behavioural change in department managers and staff.

Contact Us

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Meridian Productivity was established 1996, and has been extensively involved in the Healthcare industry across the United Kingdom, Republic of Ireland, Holland, Belgium, Spain and the Czech Republic. Meridian assists clients across the Healthcare environment (private and public) in achieving improved operating efficiencies and performance, through the development of bespoke management and behavioural processes. These processes are all designed and implemented to ensure that our client organisation can be assured of returning the best performance on the resources applied.

We work with about 20 to 25 organisations a year, both in the public and private sectors, helping them to reduce their operating costs, improve their productivity and provide value for money.

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