



T.I.P. Corner

QUALITY - TRAINING - IMPROVEMENT - PROCESS

Notes and Communication

Communicating with our clients, Referral Sources, and clinicians is an essential part of our business, we cannot neglect this vital part of our jobs. Whether internally or externally, effective communication in all forms is crucial to the order process. Clients' need us and the service we provide, and it is our responsibility to give them the best of us.

Key to Effective VS Ineffective Notes

- ✓ Identify the best way to take action.
- ✓ Ensure your notes clearly indicate the actions you took keep the order moving.
- ✓ Are your notes clear enough to express what took place and what the next steps are?
- ✓ Do your notes lead to more questions than answers?



Jane Smith, Funding - LMN, PMDSWO, Client Interaction – Called MD office, spoke with Molly P. at front desk who confirmed the LMN and PMDSWO were received and placed on MDs desk for completion. She advised docs should be returned via fax, by Friday 5.17. Spoke with client, provided order update, and advised of MD convo. She would like a return call if docs are not received by next Friday 5.24. Once LMN and PMDSWO are received and confirmed order will be ready for submission.



Jane Smith, Funding - LMN, PMDSWO, Client Interaction – Called MD office, confirmed fax received. Reached out to client to let them know.

Customer Service, managers, ATP's, QA, and the MIR team all use our notes without good notes our teammates are unaware of the steps that have been taken and what comes next. This leads to more emails, phone calls, and teams' messages for you. Eliminating these messages and calls frees up you to take care of our clients

The 5 W's of Good Communication:

It is important when we are communicating with clients and referral sources to obtain all pertinent information and communicate in a clear and concise manner.

Who – Who you spoke with

What - What was discussed/ What is needed

When - When do you need the information/ Time frame for response

Where - Where they should send the information to

Why? - it is vital that we have clear communication in notes for NSM and AGS partners so we can be as efficient as possible to reach our collective goal, getting the client's needs met.

70% of people say they've stopped dealing with a company and moved to a competitor due to a feeling they were ignored.

53% of people said unclear communication was the biggest issue preventing them from having a good customer service experience.

\$1.2 trillion annual loss was recorded among U.S. businesses due to poor communication.

AIDET

Client Interaction

Acknowledge Greet the client by name. Make eye contact, smile, and acknowledge family or friends in the room.

Introduce yourself with your name, skill set, professional certification, and experience.

Duration Give an accurate time expectation for next steps. When this is not possible, give a time in which you will update the client on progress.

Explain step-by -step what to expect next, answer questions, let the client know how to contact NSM.

Thank the client and/or family. Express gratitude for them for choosing NSM. Thank family members for being there to support the client.