Customer Value Survey 2020

HealthShare NSW

TOPLINE REPORT V1.3

KEY CHANGES BETWEEN 2018 AND 2020

Focus: leverage Expo as a key opportunity to drive awareness and engagement of the survey and to ensure results are available to inform the Senior Leaders Forum

- The Customer Value Survey (the 'Survey') format was successful in 2018 and therefore continued in 2019/2020. This included:
  - Relatively short survey length, reducing by 5min in length (11mins 12sec median in 2020 compared to 16mins in 2016).
  - Strong completion rates with low drop outs (on par to 2018 at 44% compared to 37% in 2016).
  - Filtered service "deep dive" sections to ensure participants only answered for relevant service interactions and given the option to complete a second service or not.
  - This year a new question was included with direct intent to gauge customer values for the next 4-year strategic plan. The question asked participants to rank priorities of highest value.

- The main difference of the 2020 Survey was the response capture time. Previously this survey was conducted in February.
  - The survey was launched at Expo, November 22nd 2019.
  - A targeted and intensive communications strategy was undertaken to encourage participation from Expo through to December 16th 2019.
  - Survey closed January 9th 2020.
  - Survey fieldwork time coincided with emergency level bushfire incidents across the state.

- Deliverables for 2020 provide the tools for targeted strategic conversations and actionability.
  - Tailored reports for individual service lines to enable knowledge transfer and calls to action.
  - Excel dashboard deliverable repeated to enhance data accessibility and actionability.
  - Extensive verbatim analysis undertaken to deeply explore improvement opportunities for services as well as bring the customer personas to life and enhance customer centric strategic conversations.

KEY FINDINGS FOR 2020 CUSTOMER VALUE SURVEY (1 OF 2)

Strong performance gains achieved in 2018 have been maintained in 2020

Participation rates:

- Participation in the 2020 Survey was not as strong this year, compared to 2018. While previously successful, targeted and intensive communications strategies to drive customer participation were implemented with even greater efforts this round, we suspect the state emergencies which coincided with the survey capture period has hindered our response rates.

- The profile of customer participation was, however, similar to previous years with broad representation across all customer groups, positions and functional areas.

Baseline measures:

- In 2018 significant gains were achieved across all key measures of customer satisfaction, engagement and Net Promotor Score (NPS). The gains in satisfaction and engagement were maintained this year with no significant difference in overall scores for these measures. Specifically:

  - **Satisfaction:** Slight increase in average satisfaction (not significant). This results is driven by a significant increase in those rating 1-4 out of 10 ('%dissatisfied'), a significant decrease in those rating 5-6 out of 10 ('%neutral'), and slight increase (not significant) in those rating 7-10 (%satisfied).

  - **Engagement**: Rating of the engagement attributes *demonstrating value for money* and *open and transparent communication* have declined slightly which has held back overall engagement scores. We see more polarisation in the 'highly engaged' versus 'highly disengaged' segments. Rural / regional engagement scores are also lower than last survey period.

  - **NPS:** NPS has further improved with a significant increase from -41 in 2018 to -32 this year. This result is driven by the significant reduction in detractors (3% decrease) and significant increase in promoters (4% increase).

- Clinical Team Members, who make up the largest proportion of customers surveyed, record lower satisfaction, engagement and NPS compared to most other customer groups this year and show a considerable decline to 2018.

KEY FINDINGS FOR 2020 CUSTOMER VALUE SURVEY (2 OF 2)

Strong performance gains achieved in 2018 have been maintained in 2020

Service lines:

- Almost all services lines have a higher average satisfaction score compared to the average satisfaction score for HealthShare NSW overall. This indicates that the individual services experience is more positive than the overall perception of the HealthShare NSW 'brand'.
  - There have been mixed results by service lines. 4 services have seen increases in average satisfaction, 2 have maintained average satisfaction scores and 3 have show declines. The remaining service being new to measurement this year.
  - The services with the highest average satisfaction this year is the newly added Make Ready service with 8.4, followed by Workforce at 7.4 and Linen services at 7.1. The services with the lowest average satisfaction scores include Food Services with 6.0, Patient Transport Services with 6.3 and Patient Support Services with 6.4.
  - Despite some movement in average satisfaction scores for individual LHDs, average % satisfied and average % dissatisfied for regional/rural LHDs and Metro LHDS has maintained this year compared to 2018.
- The highest priority service lines (based on impact on overall satisfaction with HealthShare NSW, reach and higher dissatisfaction) are consistent with 2018 results being *Payroll* and *Financial Services*, with *Food Services* a new high priority service based on higher proportion of dissatisfied customers this year.

Respondent profile

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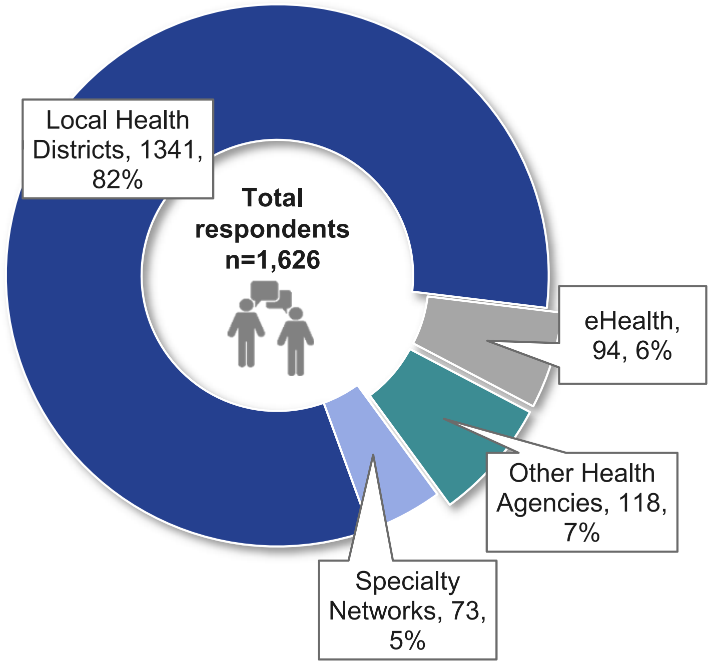
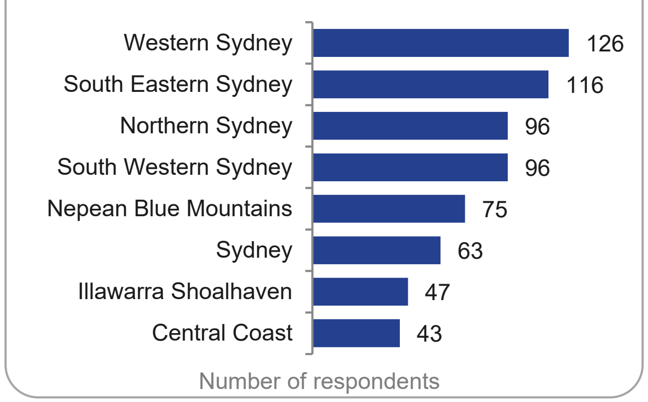
Respondent demographics

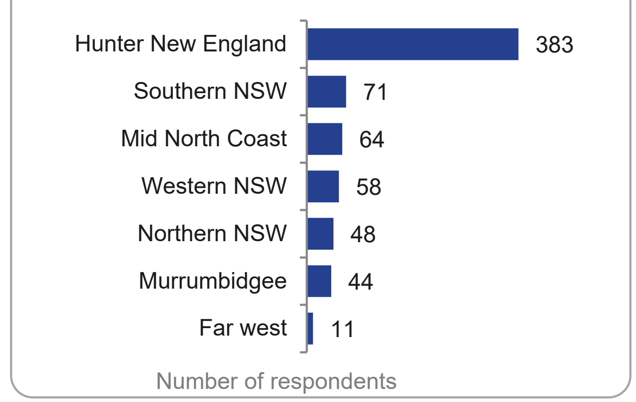
1626 HealthShare NSW customers; a decrease of 31% from 2349 in 2018



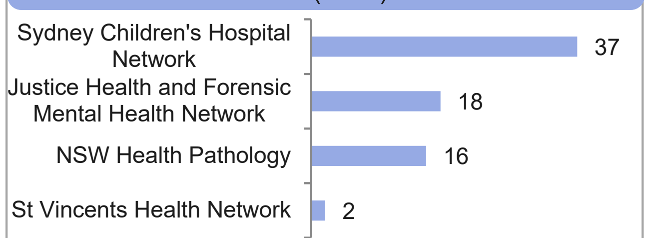
Metropolitan[1] - 49% of LHDs (n=662)



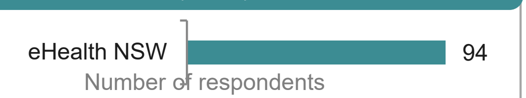
Rural and Regional NSW[1] - 51% of LHDs (n=679)



Specialty Networks (n=73)



eHealth NSW (n=94)



Other Entities (n=118)

2020 vs 2018

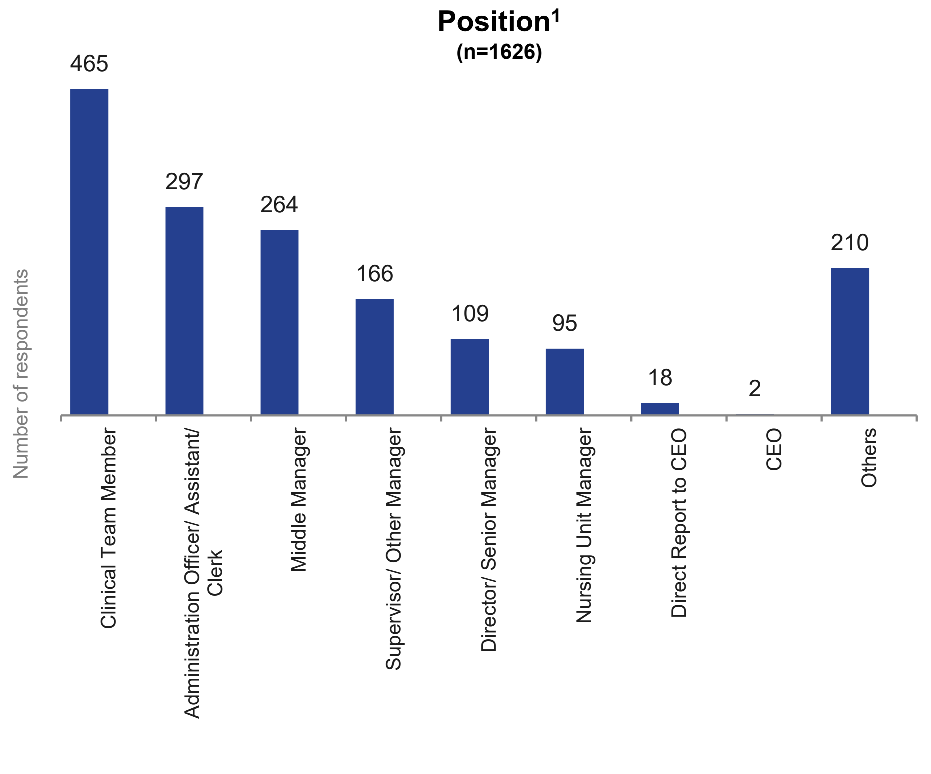
- No changes to customer groups this year
- A decrease in Metropolitan responses and an increase in Regional responses as compared to 2018, driven by increased participation from Hunter New England
- Impact of the different LHD proportions was tested against overall scores (no significant difference) resulting in the decision to not weight the data and maintain the methodology of previous years

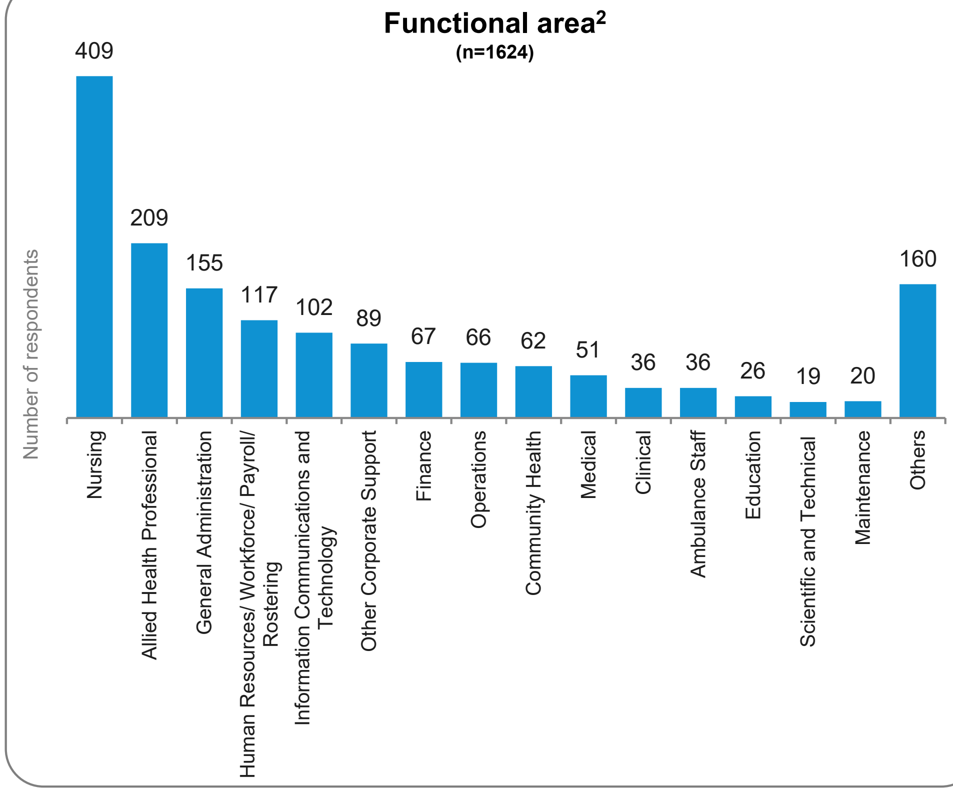
[1]Note: LHDs have been allocated to 'Metropolitan' and 'Rural and Regional NSW' as per the breakdown provided by NSW Health, http://www.health.nsw.gov.au/lhd
** Others in Other Entities include HPCA, Maintenance, Children's Collaborative, etc.*
Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

2020 2018 2016 DRAFT

Respondent demographics

Comparable proportions of responses across position and functional area to 2018





2020 vs 2018

- The rank and proportions of customer positions and functional areas is broadly similar to what was achieved in 2018 with a majority of participants being clinical team members and from nursing
- Top 3 functional areas (by respondents size) - Nursing, Allied health professional and General

[1]Note: Other includes analyst, clinical staff, IT professional, linen officer, and other management positions
[2]Note: Other includes Hotel Services, Population health, Patient Transport, Midwifery, Oral Health, Library etc. N is 1,624 as Chief Executive is not included.
Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Customer Experience *"We are people helping people deliver excellent healthcare."*

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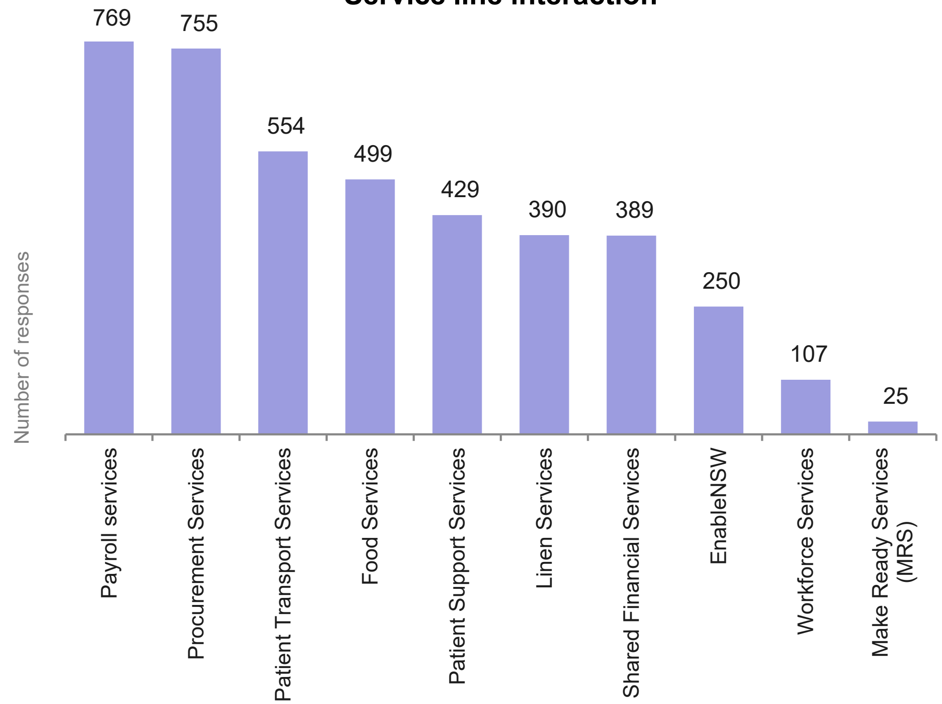
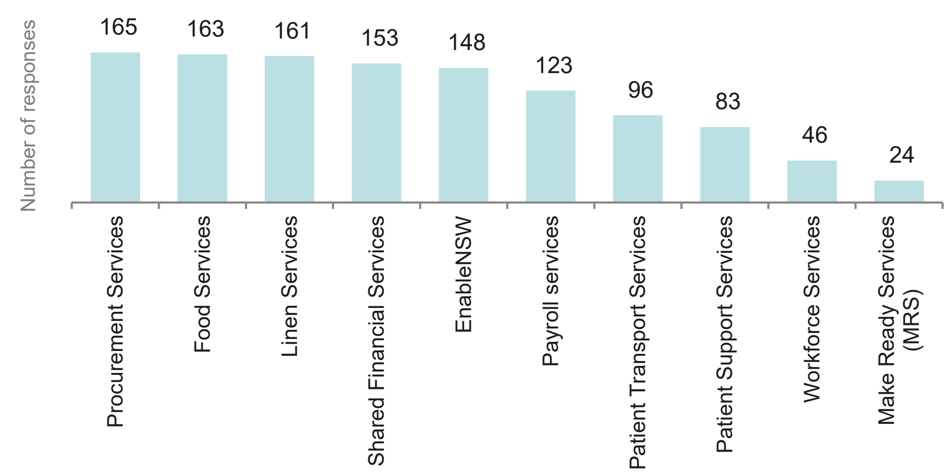
Service line interactions





2020

- Payroll and Procurement continue to be the services with highest volumes of customer interaction while Workforce and Enable NSW have the least, now including Make Ready Service being newly added to the survey this year.
- Robust sample sizes (>30) were achieved for almost all service lines in the survey deep dive section which explored satisfaction of service functions and improvement opportunities.
- Participants completed on average 1 service line each

Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Overall HSNSW results

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Baseline measures for 2020

Baseline scores have been maintained at the high levels achieved in 2018

		2020 (n=1,626)	2018 (n=2,349)	2016 (n=1,450)
Overall Satisfaction	Average overall satisfaction (out of 10)	6.3	6.2 ▲	5.3
	% satisfied (7-10)	52%	49% ▲	32%
	% neutral (5-6)	26% ▼	31%	33%
	% dissatisfied (1-4)	23% ▲	20% ▼	35%
Engagement	Average engagement (out of 10)	6.3	6.4 ▲	5.5
	% of customers by level of engagement	22% Highly engaged; 29% Engaged; 27% Neutral; 22% Disengaged	21% Highly engaged; 35% Engaged; 30% Neutral; 14% Disengaged	10% Highly engaged; 27% Engaged; 31% Neutral; 32% Disengaged
Net Promoter Score (NPS)	NPS	-32 ▲	-41 ▲	-66
	% promoters	19% ▲	13% ▲	6%
	% passives	30%	33% ▲	22%
	% detractors	51% ▼	54% ▼	72%

No significant shift to 2018 indicating gains in 2018 have been maintained

Note: The four engagement attributes are trust, value for money, open and transparent communication and strong relationship with HealthShare NSW
Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Legend: ▲ Statistically significant increase compared to previous year ▼ Statistically significant decrease compared to previous year

Baseline measures vs. target

To increase customer engagement and satisfaction by 25% by June 2020

Whilst performance has maintained this year, overall gains over the past 4 years fell short of the June 2020 targets with satisfaction 0.3 short at 6.3 compared to the 6.6 target and engagement 0.6 short at 6.3 compared to the 6.9 target.

		2020 (n=1626)	2018 (n=2349)	2016 (n=2349)	Increase to 2020 from 2016	Vs June 2020 Target	Difference
Overall Satisfaction	Average overall satisfaction (out of 10)	6.3	6.2	5.3	+1.0 / 19%	6.6	-0.3
Engagement *	Average engagement (out of 10)	6.3	6.4	5.5	+0.8 / 14%	6.9	-0.6

Note: The four engagement attributes are trust, value for money, open and transparent communication and strong relationship with HealthShare NSW

Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Customer engagement with HealthShare NSW services

		2020 (n=1,626)	2018 (n=2,349)	2016 (n=1,450)
Average	Average engagement (out of 10)	6.3	6.4 ▲	5.5

Customer Engagement Scores

Customer engagement scores across four factors

Customer Engagement	2020	2018	2016
My organisation has a strong relationship with HealthShare NSW	6.9/10	6.9/10	6.3/10
HealthShare NSW demonstrates value for money	5.7/10	5.9/10	4.8/10
HealthShare NSW communicated openly and transparently	6.1/10	6.2/10	5.3/10
HealthShare can be trusted to deliver services to my organisation	6.6/10	6.6/10	5.7/10

Customer Engagement Segments

% of customers by level of engagement

Segment	2020	2018	2016
Highly engaged – Strongly agree (9-10) with majority of the engagement statements*	22%	21%	10%
Engaged – Agree (7-8) with majority of the engagement statements*	29%	35%	27%
Neutral – Neutral (5-6) to majority of the engagement statements*	27%	30%	31%
Disengaged – Disagreement (1-4) with majority of the engagement statements*	22%	14%	32%

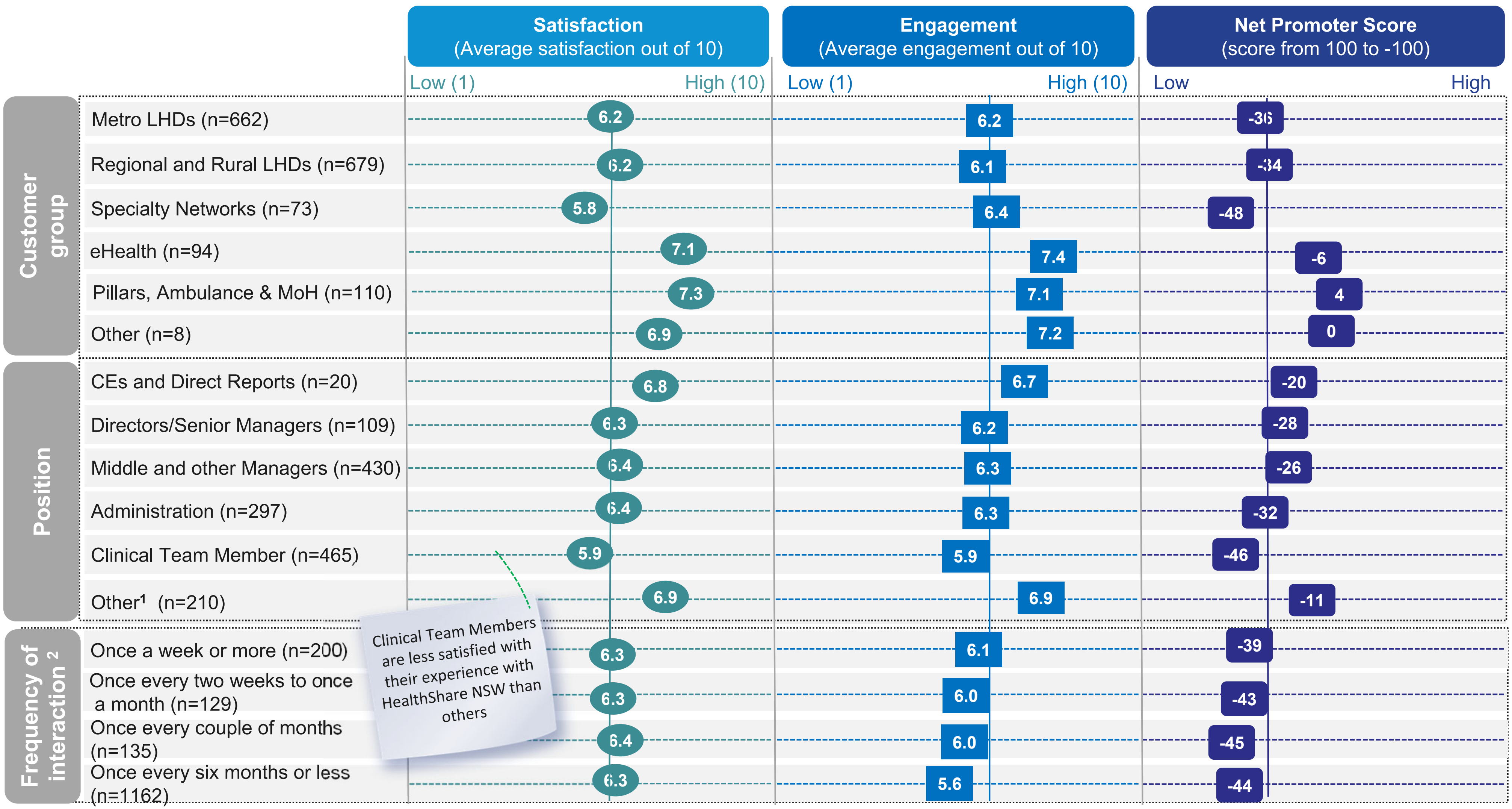
**Note: Majority refers to 3 out of the 4 engagement statements*

Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Legend: ▲ Significant increase compared to 2018

2020 2018 2016

Variation in baseline measures by customer group, position and interaction frequency



[1]Note: Other includes Clinical staff, Finance, IT staff, Management etc.

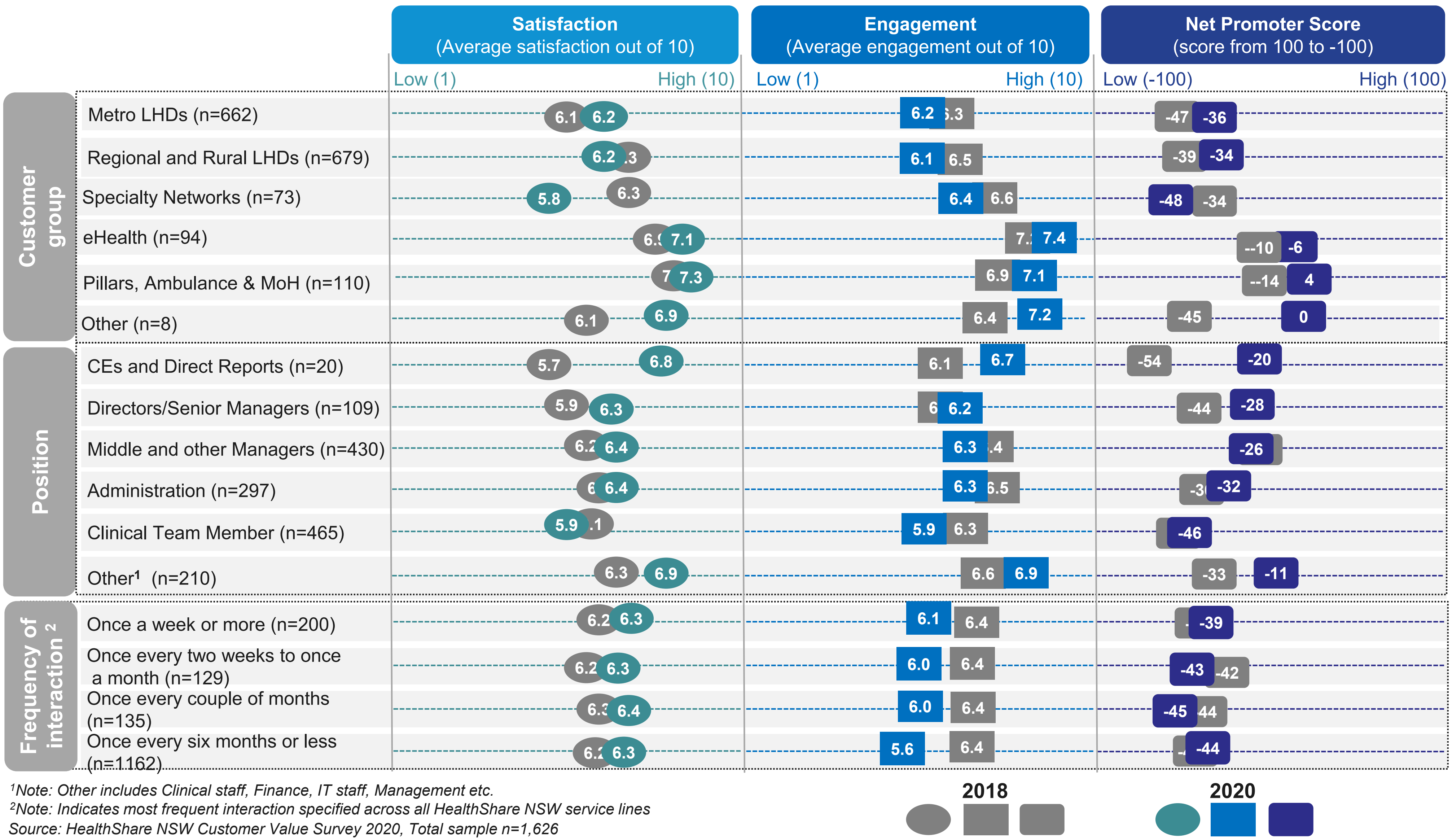
[2]Note: Indicates most frequent interaction specified across all HealthShare NSW service lines

Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Solid vertical lines indicate overall HealthShare NSW average score

2020 2018 2016

Variation in baseline measures 2020 compared to 2018



[1]Note: Other includes Clinical staff, Finance, IT staff, Management etc.
[2]Note: Indicates most frequent interaction specified across all HealthShare NSW service lines
Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Customer Experience "We are people helping people deliver excellent healthcare."

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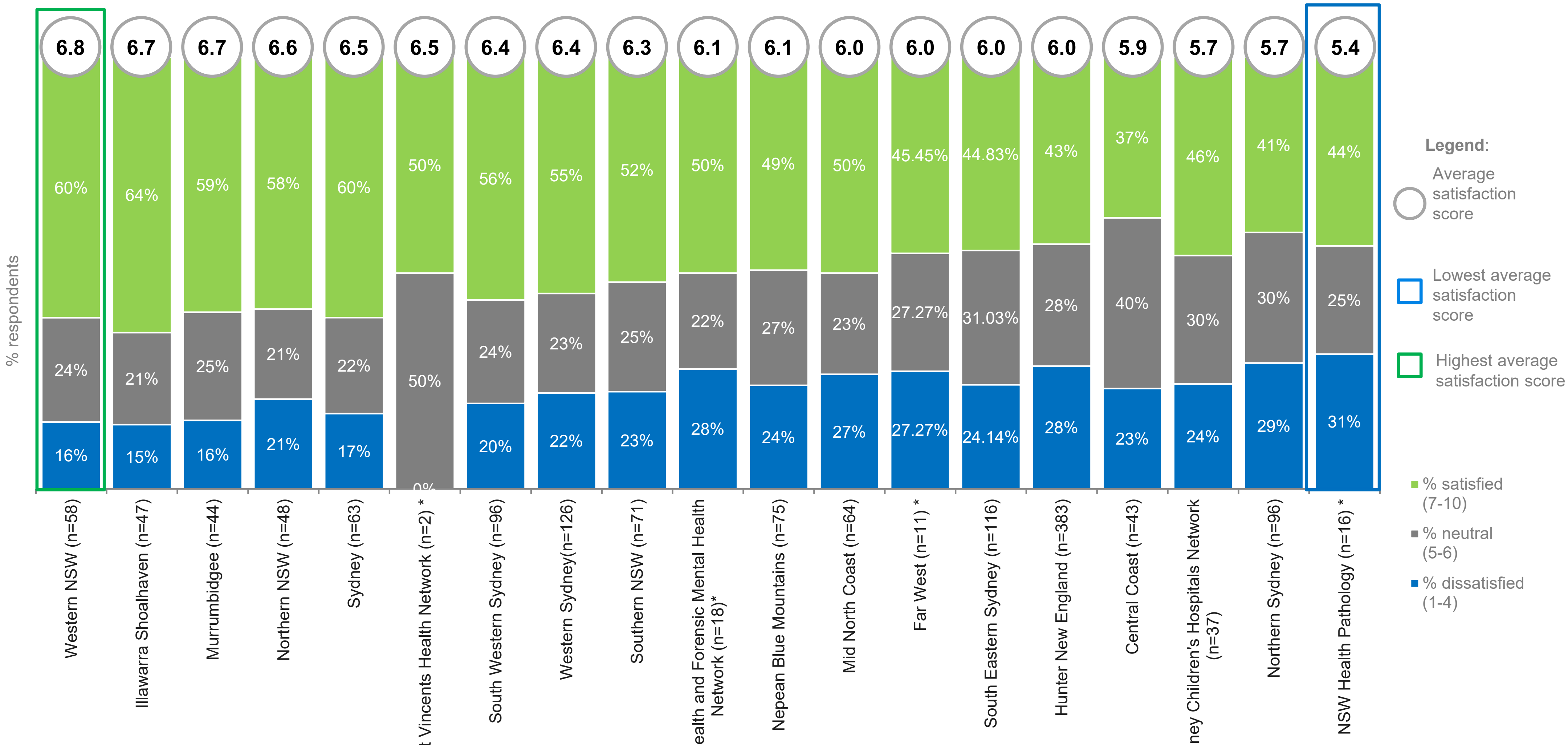
Overall satisfaction by LHD

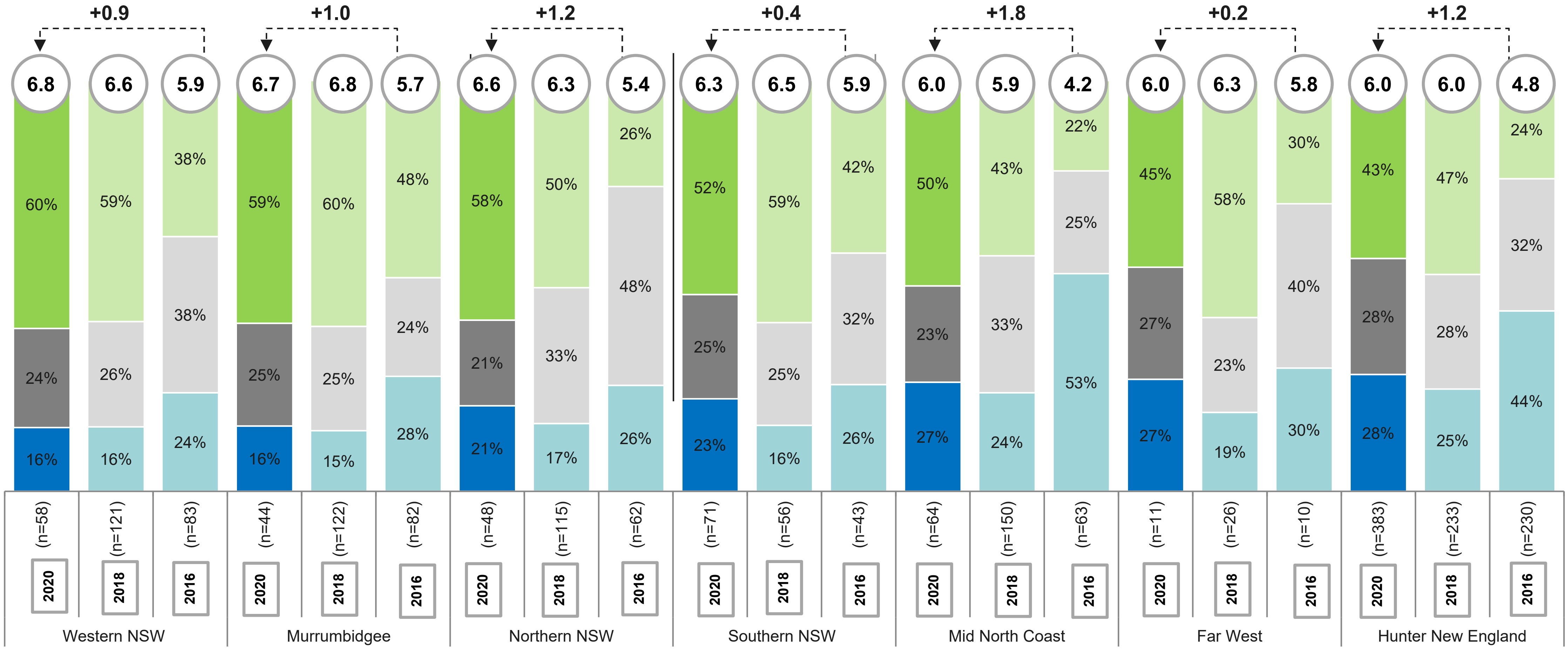
2020 Survey results show that customers from NSW Health Pathology have the lowest average satisfaction with HealthShare NSW, while Western NSW has the highest compared to other LHDs



**Note: Low number of respondents (n<30)*
Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Satisfaction trend analysis for Rural and Regional LHDs

Average number of satisfied customers has increased from 52% in 2018 to 53% in 2020 across Rural and Regional LHDs in 2020



LHD	Year	n	Avg. score	% satisfied	% neutral	% dissatisfied
Western NSW	2020	(n=58)	6.8	60%	24%	16%
Western NSW	2018	(n=121)	6.6	59%	26%	16%
Western NSW	2016	(n=83)	5.9	38%	38%	24%
Murrumbidgee	2020	(n=44)	6.7	59%	25%	16%
Murrumbidgee	2018	(n=122)	6.8	60%	25%	15%
Murrumbidgee	2016	(n=82)	5.7	48%	24%	28%
Northern NSW	2020	(n=48)	6.6	58%	21%	21%
Northern NSW	2018	(n=115)	6.3	50%	33%	17%
Northern NSW	2016	(n=62)	5.4	26%	48%	26%
Southern NSW	2020	(n=71)	6.3	52%	25%	23%
Southern NSW	2018	(n=56)	6.5	59%	25%	16%
Southern NSW	2016	(n=43)	5.9	42%	32%	26%
Mid North Coast	2020	(n=64)	6.0	50%	23%	27%
Mid North Coast	2018	(n=150)	5.9	43%	33%	24%
Mid North Coast	2016	(n=63)	4.2	22%	25%	53%
Far West	2020	(n=11)	6.0	45%	27%	27%
Far West	2018	(n=26)	6.3	58%	23%	19%
Far West	2016	(n=10)	5.8	30%	40%	30%
Hunter New England	2020	(n=383)	6.0	43%	28%	28%
Hunter New England	2018	(n=233)	6.0	47%	28%	25%
Hunter New England	2016	(n=230)	4.8	24%	32%	44%

Rural and Regional NSW
2020: (Avg. % sat: 53 | Avg. % dissat: 22)
2018: (Avg. % sat: 52 | Avg. % dissat: 20)
2016: (Avg. % sat: 31 | Avg. % dissat: 36)

**Note: Low number of respondents (n<30). **Note: This LHD falls within both Metro and Rural/Regional*
Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Customer Experience “We are people helping people deliver excellent healthcare.”
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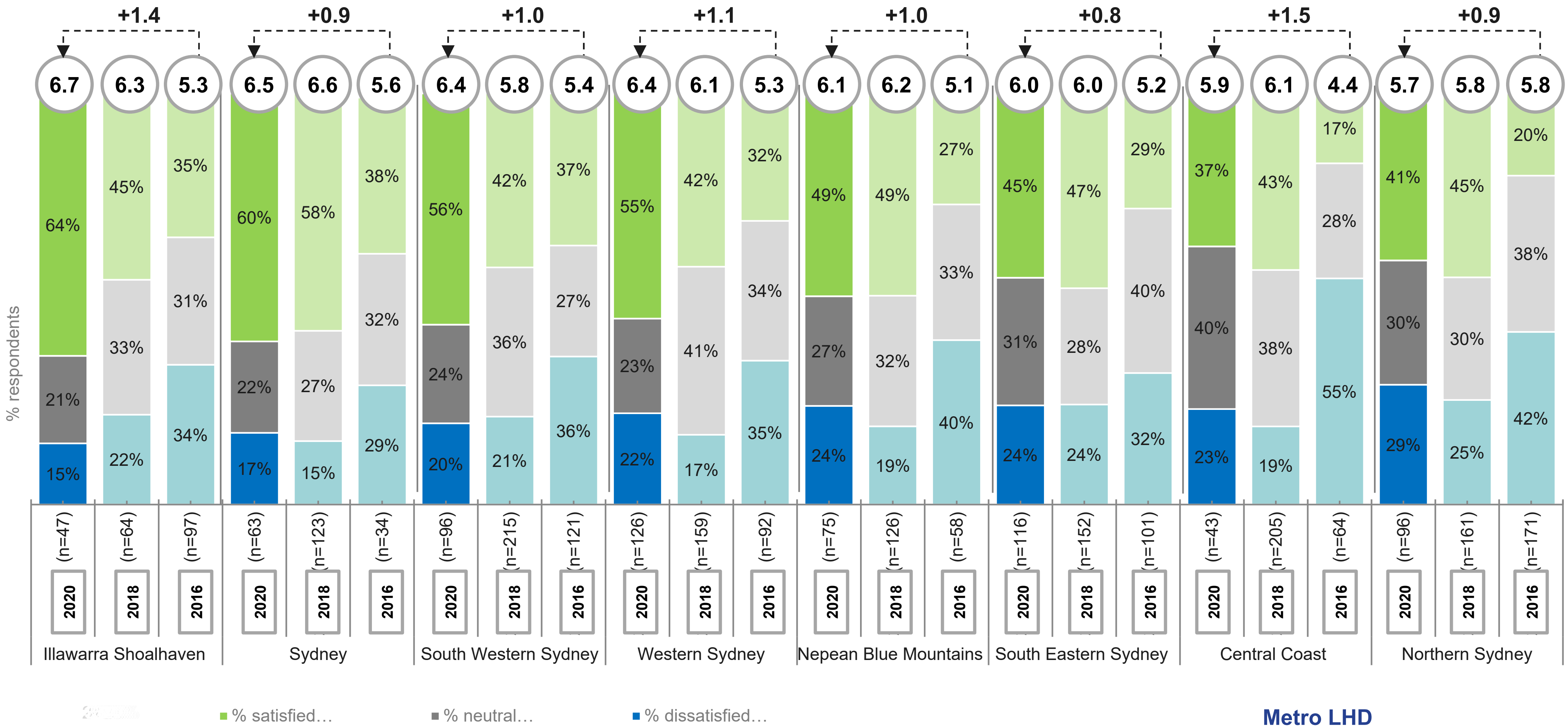
Satisfaction trend analysis for Metro LHDs

Average number of satisfied customers in Metro LHDs has decreased from 52% in 2018 to 51% in 2020



Legend: Average satisfaction score | Lowest average satisfaction score | Highest average satisfaction score

Metro LHD
2020: (Avg. % sat: 51 | Avg. % dissat: 22)
2018: (Avg. % sat: 46 | Avg. % dissat: 20)
2016: (Avg. % sat: 29 | Avg. % dissat: 38)

Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Customer Experience
"We are people helping people deliver excellent healthcare."
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Service line results

Overall satisfaction
Trend analysis
Prioritisation

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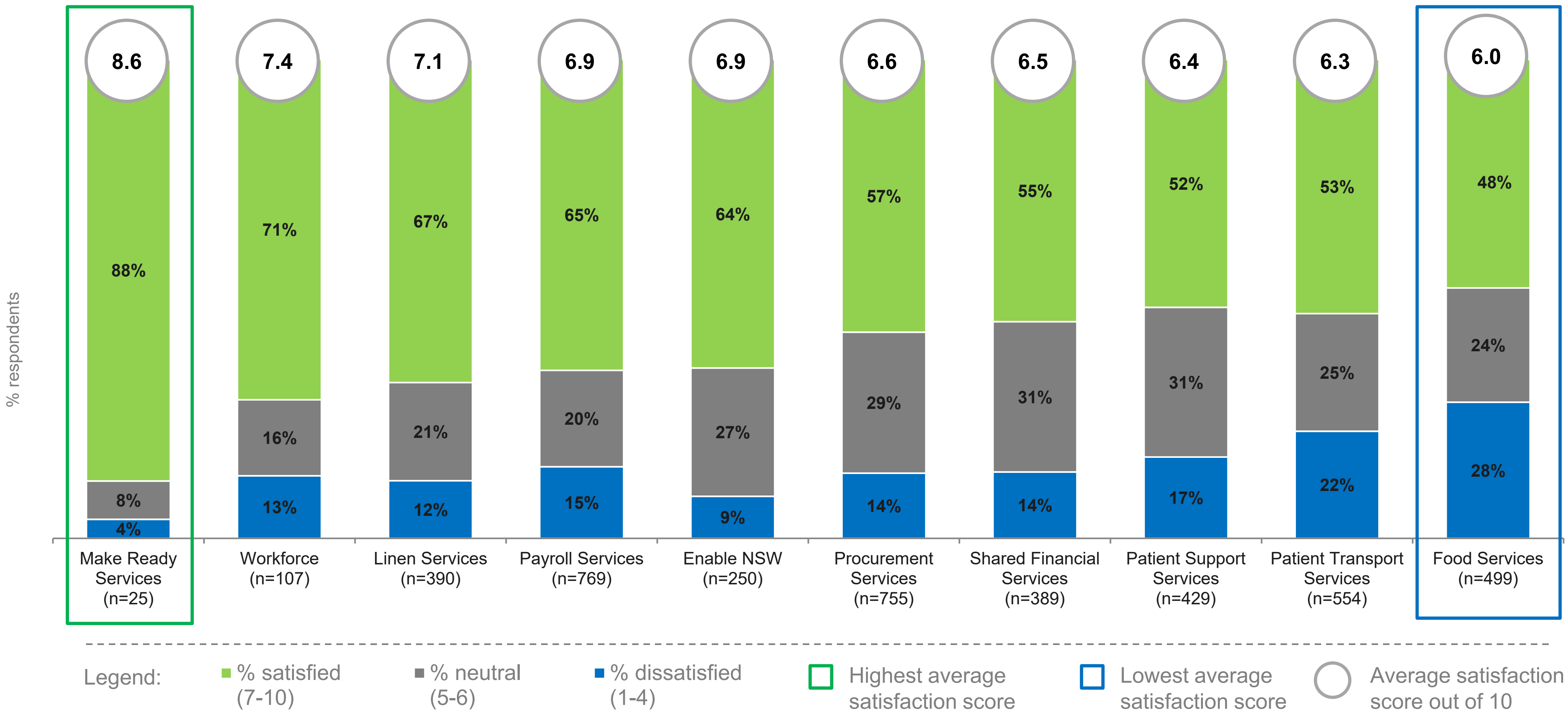
Overall satisfaction by service line

Almost all services lines have a higher average satisfaction score compared to the average satisfaction score for HealthShare NSW overall



Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

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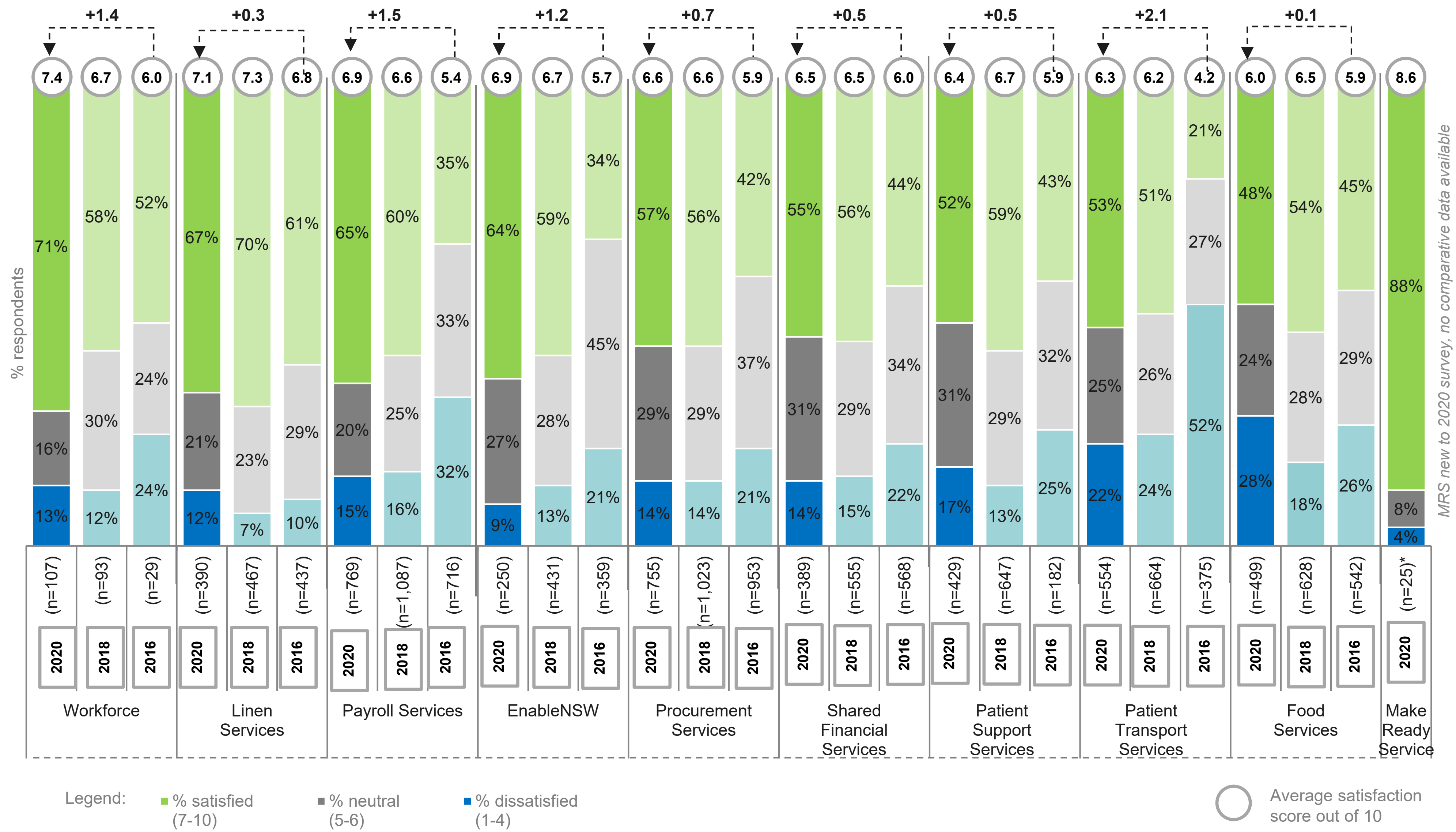
Satisfaction trend analysis by service line

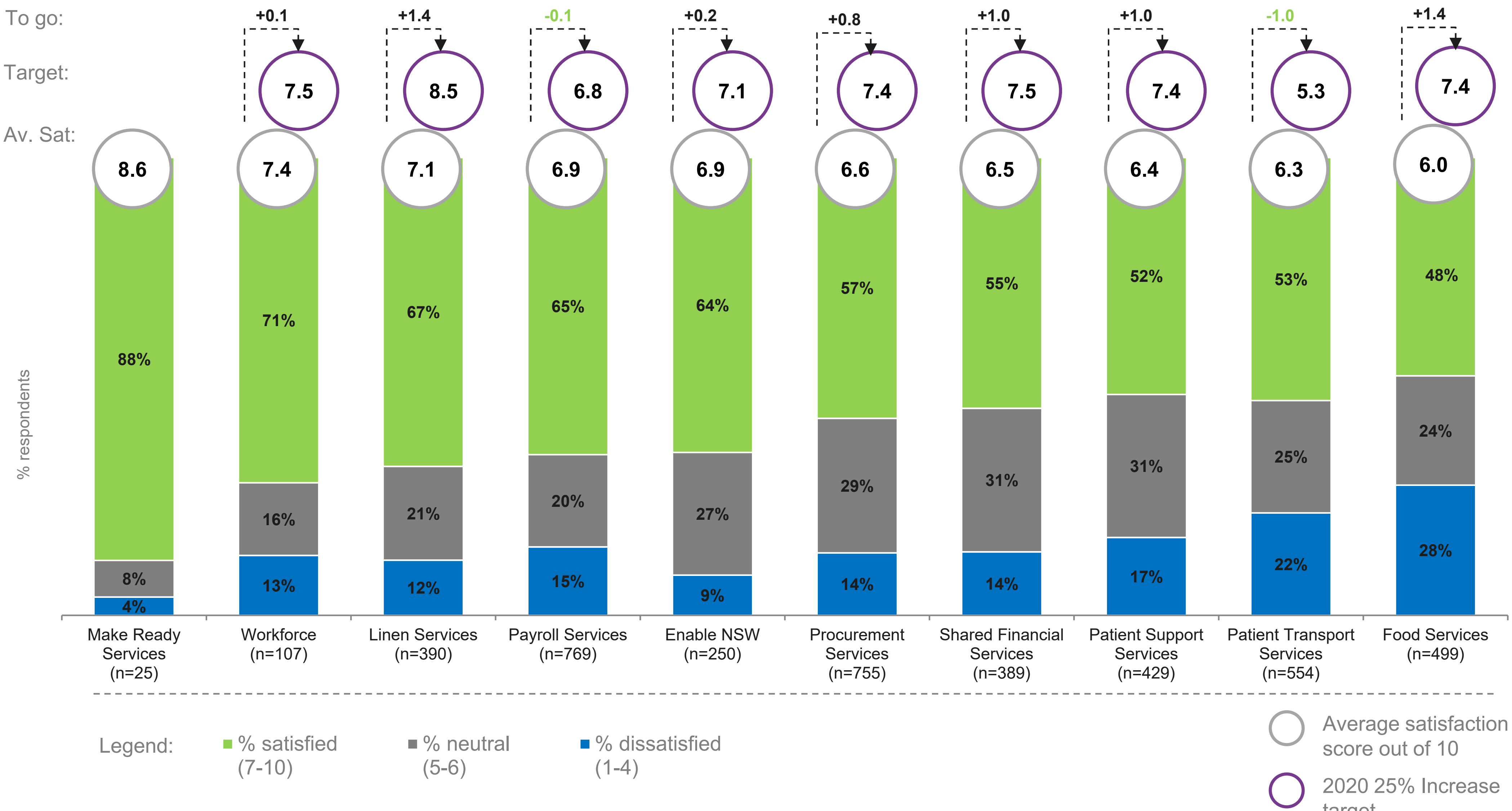
In 2020, average satisfaction is higher for Workforce and Linen Services whereas in 2018 the higher satisfaction was for Linen and Enable NSW



* Indicates low number of respondents (n<30), as such the significance testing results were not reported
Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Overall satisfaction by service line vs. 25% increase targets by 2020

Two services achieved or exceeded targets



Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

2020 2018 2016

Service line prioritisation analysis

Service line	Impact on overall satisfaction with HealthShare NSW[1]	Satisfaction with service line (% dissat | % sat)		Size of respondent base[2]	Service Line Prioritisation[3]
Payroll Services	0.65	15%	65%	769	H
Food Services	0.60	28%	48%	499	H
Patient Support Services	0.64	17%	52%	429	H
Procurement Services	0.62	14%	57%	755	H
Shared Financial Services	0.71	14%	55%	389	M
Workforce	0.87	13%	71%	107	L
Patient Transport Services (PTS)	0.51	22%	53%	554	L
Linen Services	0.50	12%	67%	390	L
EnableNSW	0.59	9%	64%	250	L
Make Ready Services	0.31	4%	88%	25*	L

Prioritised services have high impact on overall satisfaction with HealthShare NSW and higher dissatisfaction (opportunity to improve) with additional consideration for base sizes.

High prioritisation for Payroll and Procurement Services continues from 2018. The high proportion of "dissatisfied" for Food services increases the priority for this service this year.

[1]Note: Based on correlation between satisfaction with service line and overall satisfaction with HealthShare NSW; higher numbers indicate higher impact on overall satisfaction

[2]Note: Number of respondents who interact with the service line once every couple of months or more often, with the exception of Procurement, EnableNSW and PTS which includes once per six months or more often

[3]Note: High priority has been given to service lines which satisfaction has a high impact on satisfaction with HealthShare NSW overall, a higher proportion of customers are dissatisfied with this service line today and there is a high number of customers who interact with this service line

Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Strategic Priorities

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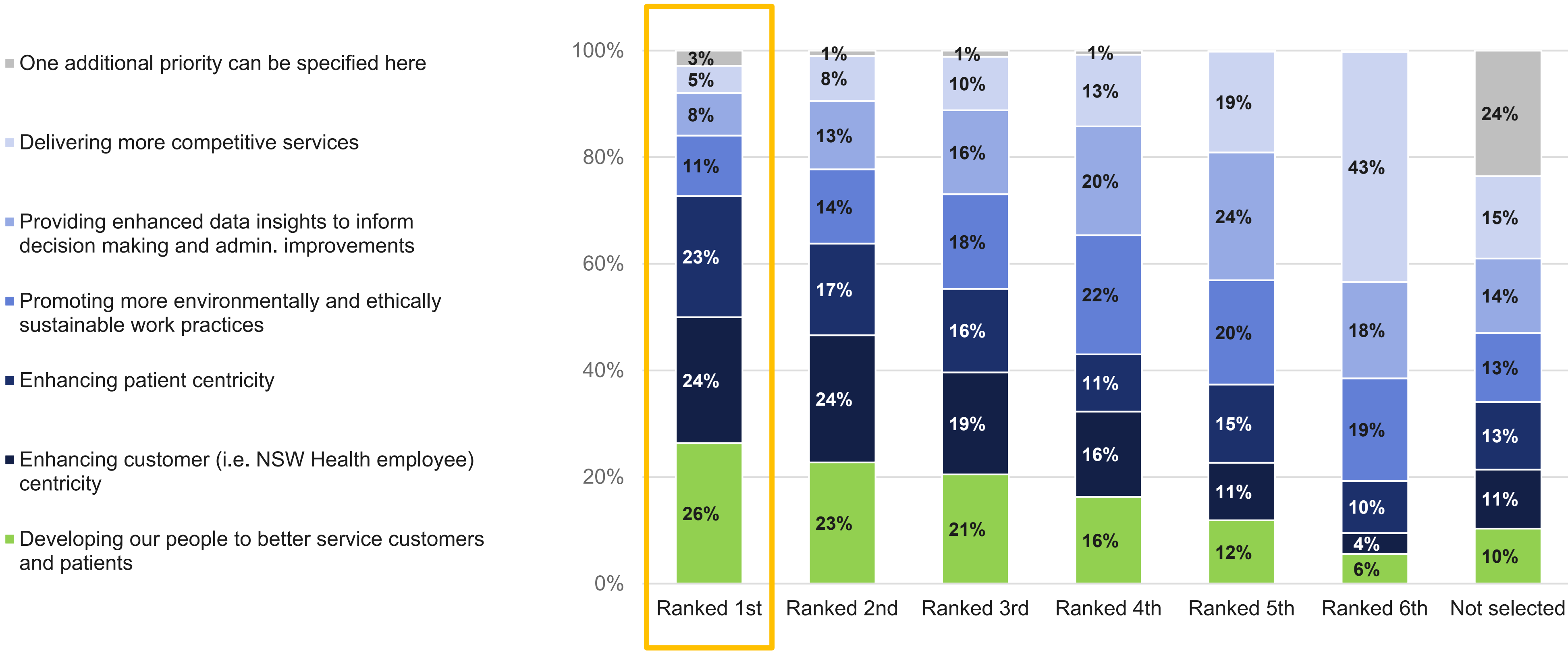
The next 4-year Strategic Plan

Out of the 6 strategic priorities, *"developing our people to better service customers and patients"* was most often ranked 1st, very closely followed by *'enhancing customer centricity"* and *"enhancing patient centricity"*



Question wording: QB4.1 HealthShare NSW is in the process of developing its next 4-year Strategic Plan. The Strategic Plan is a statement of its priorities and guides HealthShare NSW's work. We would like to understand the area which HealthShare NSW should focus on in its next Strategic Plan to provide you more value. Please read the following priority statements and rank them in order of value to you, the first position for the priority with highest value to you, and the last being the priority with least value to you. If you do not have an opinion, please press next to skip the question.

Source: HealthShare NSW Customer Value Survey 2020, Total sample n=1,626

Looking forward

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IMMEDIATE NEXT STEPS

Full reporting, service level detail and actionability session

Finalise the 2020 Survey reporting, including:

- Detailed needs analysis to provide focus for action
- Service chapters to highlight performance vs targets, performance vs. customer charter, including calls to action
- Finalise the interactive excel dashboard
- Verbatim analysis

Key presentation and workshop dates:

- ELT offsite 14th February (PwC lead)
- Senior Leaders Forum 20th February
- First service line debrief with PTS 25th February
- Board 27th February

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DRAFT

To drive a step change in results we need to consider the key ingredients of a leading customer centric organisation

The following are the core capabilities of a customer centric organisation at both a strategic and delivery level. HealthShare NSW has the opportunity to build on current learnings and embed VoC into other aspects of the organization, starting with strategic capabilities

At a strategic level HealthShare NSW has many of these artefacts however the organisation needs to align on their priority.

Strategic capabilities

Customer led strategy

There is a set, endorsed and concrete vision for the organisation to improve the customer experience, supported by an operating model, KPIs and . Customer experience is used to guide strategic investments.

Customer promise

There is clarity and alignment on the 'promise' HealthShare NSW has made to customers and how the organisation will respond to their needs in a compelling and differentiated way.

Channel and experience Design

There is a clear view of the experience that you will ultimately deliver aligned to the CVP. Channels through which customers can interact align to customer preferences and enable seamless interactions.

Embedded feedback system

Customer feedback is regularly collected at both a strategic and operational level and actioned through both strategic initiatives and tactical responses.

At a delivery level, capabilities vary widely across service lines but none are completely aligned.

Delivery capabilities

Aligned governance & roadmap

There is an endorsed delivery roadmap which is supported by a robust governance process across all levels of the organisation for delivering the Customer Strategy and end-to-end experience.

Aligned Technology

Underlying management information systems, digital capability, and applications enable the delivery and management of the CVP and end-to-end customer experience.

Aligned processes

Processes are designed to deliver an easy customer journey. Processes are constantly reviewed and updated to optimise the journey for the customer.

Aligned people

Developing, recruiting and rewarding the 'right' behaviour to support and deliver the desired Customer strategy. Customer facing staff are empowered to make a difference for customers.