Registry Public Relations through User Group Meetings

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Introduction

Founded in 1988 as an Arizona-based corporation, **Scientific Technologies Corporation (STC)** now has offices in seven cities across the United States. Since 1993, **STC** has been actively involved with the development and implementation of statewide immunization registries across the United States. These efforts have ranged from short term consulting on issues related to registry marketing, provider retention, and recruitment campaigns, coalition building and legislative support to developing and on-site implementation of Web-based statewide immunization registries. With over one hundred years of staff registry expertise, **STC's** collective knowledge and experience formulates significant recommendations regarding a component of immunization registry implementation often abandoned when recruitment expands beyond the pilot stages. The following pages summarize a methodology for combining self-perpetuating public relations, customer support, customer input and consistent communication through a single on-going activity – User Group Meetings.

Marketing and Public Relations Definitions

Once the registry has been announced to the community, it is time to initiate a profitable public relations campaign. In general, the term public relations describes ongoing activities to ensure that a particular business has a strong public image. In the case of immunization registries, the particular "business" is the registry system and the "public image" is the customer's opinion of the business (the registry). The primary goal of immunization registry public relations is to arouse *and* maintain enthusiasm of the customer – that is, those who use the registry.

In **STC's** experiences, every registry project has a unique set of circumstances, which make public relations especially important. History of previous failed systems, mandated reporting met with resistance, vocal anti-immunization groups, or an aggressive implementation schedule demand public relations attention, to ensure success. No project should assume they can rest on their laurels. Users need to be reminded and satisfied, continually.

Timing is everything. It is critical that a registry project take proactive steps to satisfy customer's needs during the rollout phase, while users are forming initial opinions. However, stakes continue to remain high after the initial "sale" is completed. Later in time, when registry customers move into full operation with the registry product, their satisfaction is critical for sustained enthusiasm and unwavering participation. Satisfaction is sustained through public relations mechanisms.

Public Relations Mechanisms

Promotion and publicity is generated in two ways; directly by the registry project, and indirectly through its reputation with the customer. Registry projects are right to coddle pilot sites in early implementation phases, in order to cultivate quick successes. These sites, after all, serve as an example to the rest of the provider community. Future user's buy-in is stimulated through pilot project successes. Direct, intentional promotion of success through communication crafts a positive image. Effective mechanisms include newsletters, professional endorsements and strategic presentations. Indirect promotion relies on the perception of the customer. Customer satisfaction is key.

Customer Satisfaction

According to the Academy of Marketing Science; "While the literature contains significant differences in the definition of satisfaction, all the definitions share some common elements… consumer satisfaction is a response (emotional or cognitive), the response pertains to a particular focus (expectations, product, consumption experience, etc.), and the response occurs at a particular time (after consumption, after choice, based on accumulated experience, etc). Because customer satisfaction deals with emotions, expectations and impressions, it cannot be easily controlled.

Studies suggest customer satisfaction is closely tied to the perception that the customer was heard, understood and considered. Cultivating customer satisfaction of an immunization registry does not insinuate that functions, features and procedures are commanded by individual personalities. Rather, customer satisfaction describes mutual two-way communication between the registry project management and the registry user, together in an effort to present the best possible product.

<u>Two-Way Communication: User Group Meetings</u>

STC confirms the best possible method for on-going two-way communication between project management and user is User Group Meetings. User Groups are regularly scheduled interactive meetings of registry users facilitated by staff from the registry project. The purpose of these meetings is to create a network of communication between user sites as well as with the registry project staff. User Group meetings are *not* training sessions, although demonstrations as reminders about how to use certain functions of the system may be included in the agenda. When planned and facilitated correctly, User Groups provide an opportunity to promote continued use of the system, solve common user problems, listen to user needs, and collect feedback for future upgrades.

Who should attend?

To work effectively, each registry user site (provider office) should commit to regular attendance. This commitment can be fostered by discussing the importance of the meetings during training, in the enrollment packet, through newsletters and mailings. At least one person from each site should be the designated liaison between their office and the registry project. At a minimum, this person will represent their site at User Meetings, take responsibility to learn about updates and system changes, and communicate User Meeting information back to their site administrators and co-workers. On a more extensive level, the liaison is also tasked with recommending system changes to the project, based on their experience using the system. All staff that use or interact with the registry should be encouraged to attend.

Should different types of users mix?

There are two groups of users: new users vs. experienced users; and public vs. private provider users.

An effective User Group Meeting follows a lowest common denominator rule of thumb. Participants should have enough in common so that discussions throughout the meeting are relevant and of interest to all. There may be incidences when discussion topics focus on specific examples or questions relevant to one or a few users. Overall however, discussions should have application for the entire group. This is especially important when considering mixing private and public provider audiences. The following questions should be considered when deciding if groups should be blended

- Does the site enter data enter directly into the registry?
- Does the site send data to the registry via a PMS export ?
- Does the site provide VFC services?
- Does the site track vaccine inventory through the registry?
- What types of forms and paperwork is required of the site?

New users have much to learn from experienced users. It is good to add new recruits to an established User Group Meeting, provided that the new user has had prior communication with staff from the project, before the meeting. Survey telephone calls, professional association presentations and registry training sessions provide opportunities to extend a personal “face” to the user. The meeting facilitator should make special efforts to welcome new users to their first meeting.

Who should conduct the meeting?

The best candidate for the facilitator job is someone who is familiar with the system *and* the users. One major facilitating challenge is the extent to which a topic is explored Often, when user’s raise questions, the facilitator must distinguish between pursuing the topic with the group or addressing the issues individually after the meeting.

Elements of the Agenda

The agenda should reflect the meeting's overall purpose; to provide information, to collect information, to bolster dedication and to improve function and features of the existing system. To achieve this goal, the following agenda items are suggested:

1. Welcome and Introductions: Never assume everyone knows everyone – or remembers names. Regardless of group size, each person should introduce himself or herself with their name and site location. Job titles are not important and should be left out in order to encourage equality of comments and contributions without hesitance. This is also the time to introduce new sites, recognize site's outstanding work or make special announcements about sites. Ribbons and nametags help to welcome, recognize and/or announce special situations (i.e.; new user, original pilot site user, etc)

2. Project updates: Visuals and data are key. Show off success with maps, pictures, pie charts and graphs. Use team terms like "us, we and our" to include the users as reason for the progress. Whenever possible, make a point to explain *how* the users influenced success. Emphasize the site, de-emphasize the project management.

3. System updates, changes and refresher demos: Immediately identify system changes since the last meeting. Changes should be acknowledged even if they were previously addressed through other methods of communication with the users, prior to the meeting. A common pitfall is sytem updates turning into mini-training sessions. If this occurs, participants may become conditioned to "save" user questions for these meetings, instead of seeking timely solutions through established support mechanisms such as Help Desk. However, if the majority of participants agree it would be helpful to have a particular function demonstrated, a modified training-version should be offered quickly. It is helpful to keep the application up and running though out the meeting for reference.

4. Group Discussion/Question and Answer/Problems and Wishes: This is the heart and focus of the meeting. Users should be encouraged to come bearing lists. Notebooks, journals and other methods of idea keeping should be discussed during training. Users should note what they like and don't like, as well as wish would happen when using the system. Registry staff should be listening and taking notes. The facilitator should encourage users to "let it all out." Group dynamics will suggest the best discussion format. Some groups do well to present their topics in the order of the features of the registry (log in, patient search, shot entry…etc.) Others do better with "round robin" style, moving around the table/room each participant is given equal time to air their list.

   Discussion pit falls include; inappropriate amounts of time spent on single (missing other topics), dominating participants, debates, and bandwagon frustration. Benefits include; a chance to be heard, advanced development of ideas through brainstorming, exchanging tips and hints, confirming likes/dislikes.

5. Meeting Topic (optional): As follow-up or in addition to the Discussion component, it is beneficial if the facilitator is prepared to present on a particular topic with interest and application for the entire group. A particular topic may stand out as an issue, question, or idea – through User Surveys, Help Desk's reports, phone conversations with users, etc.

What's Next: Give the user's something to look forward to. Share with them what the project expects to have happen before the next meeting – more providers or data, fixes or changes to the system, contests, etc.

Collecting information in-between meetings

Essential to organizing an effective agenda is knowing the pulse of the user at any given time – particularly *before* a meeting. Surveying user's before a meeting helps the facilitator prepare for a "lowest common denominator" meeting – one with something for everyone. Surveying users extends the "I'm listening" image and provides ample thinking time for users to prepare for a solid meeting.

Summary

The primary goal of immunization registry public relations is to arouse *and* maintain enthusiasm of the customer – that is, those who use the registry. Promotion and publicity is generated in two ways; directly by the registry project, and indirectly through its reputation with the customer. Reputation stems from customer satisfaction – which is best nurtured through mutual two-way communication between the registry project management and the registry user. STC, through experience across the United States, confirms the best possible method for on-going two-way communication between project management and user is User Group Meetings. The formula for successful User Group Meetings is a mix of facilitator know-how, customization and tried and true rules of thumb. When planned and facilitated correctly, User Groups will provide an opportunity to promote continued use of the system, solve common user problems, listen to user needs, and collect feedback for future upgrades.

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