Pascal Metrics Stakeholder Survey Initiative

Context and Goal

The following is a plan to deliver mini-surveys (~ 1 min to complete) to relevant audiences about their satisfaction with Pascal Metrics (NPS survey), the software user experience (CSAT / CES surveys) or about specific objectives after each of the sessions outlined in the VPS Program Overview document (see appendix). The goal of this initiative is to get rapid, actionable feedback without inducing survey fatigue—and to build a data-driven loop to continuously refine both the content of various presentations and training programs, as well as the rollout and delivery of our Virtual Patient Safety and Risk platform.

1. After VPS Launch (Overview of Pascal Metrics & VPS Solution)

When: Immediately following the 60 min launch presentation
Audience: CEO, CNO, COO, CMO, General Counsel, IT Leadership, Patient Safety/Quality, Risk Management

Survey Questions (3):

1. **Overall satisfaction:** "How satisfied were you with today's VPS overview?"
   o   5-point Likert (1 = Very dissatisfied … 5 = Very satisfied)
2. **Relevance:** "How relevant was the content to your role?"
   o   5-point Likert (1 = Not at all … 5 = Extremely)
3. **Open feedback:** "What one thing would make this overview even more valuable?"
   o   Short text

Metrics Collected:

- **CSAT** (avg satisfaction)
- **Role-fit score** (avg relevance)
- **Top themes** from open comments

How We'll Use Them:

- Identify executive pain-points and jargon gaps.
- Refine slide deck to emphasize metrics and ROI.
- Surface any missing stakeholder concerns before integration begins.

2. After VPS Technical Integration Kickoff

When: At close of the 60 min technical kickoff
Audience: IT leadership & technical resources

Survey Questions (4):

1. **Clarity of requirements:** "How clear were the integration steps and milestones?" (5-point Likert)
2. **Confidence:** "How confident are you that your team can meet these technical requirements?" (5-point Likert)
3. **Pace:** "Was the session pace too slow / just right / too fast?" (3-point scale)
4. **Open feedback:** "What obstacle, if any, do you foresee in meeting these milestones?" (short text)

Metrics Collected:

- **Clarity score**
- **Confidence score**
- **Pace distribution** (percent "too fast," etc.)
- **Key blockers** (tagged from text)

How We'll Use Them:

- Spot areas where deeper follow-up docs or office hours are needed.
- Adjust pacing or add breakout labs for tricky topics.
- Escalate flagged blockers to project manager immediately.

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3. After Technical Integration Milestone: VPS Technical Integration Completed

When: Immediately after client & Pascal Metrics IT sign-off that all Production interfaces have been verified
Audience: Client IT leadership & engineers; Pascal Metrics IT; Expert Nurse Reviewers

Survey Questions (3):

1. **Satisfaction:** "How satisfied are you with how the technical integration went?" (5-point scale)
2. **Confidence:** "How confident are you that the interfaces will continue to run smoothly in production?" (5-point scale)
3. **Issue flag:** "Is there any issue or risk we should tackle now?" (Yes/No + if yes, short text)

Metrics Collected:

- Satisfaction score
- Confidence score

- % Issue-flag

How We'll Use Them:

- Catch post-go-live bugs before they escalate into support tickets.
- Benchmark integration satisfaction across clients.
- Surface hidden concerns around performance, permissions, or logging.

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4. After VPS Clinical Program Kickoff

When: End of the 60 min clinical-workflow overview
Audience: Hospital leadership, Patient Safety/Quality, Risk, PSL users, clinical dept leaders

Survey Questions (3):

1. **Usefulness:** "How useful was today's workflow overview?" (5-point Likert)
2. **Actionability:** "How clear are next steps for your team?" (5-point Likert)
3. **Open feedback:** "What additional resource would help you get started?" (short text)

Metrics Collected:

- **Usefulness score**
- **Actionability score**
- **Requested resources** (to prioritize follow-up materials)

How We'll Use Them:

- Create or tweak quick-start guides, FAQs, or video snippets.
- Ensure every role has a clear playbook.

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5. After Session #1: Fundamentals of Pascal Safety & Risk Methodology

When: Immediately after core methodology session
Audience: Same as Clinical Kickoff

Survey Questions (3):

1. **Understanding:** "How well did you understand the harm-measurement principles?" (5-point Likert)
2. **Relevance:** "How relevant are these principles to your daily work?" (5-point Likert)
3. **Open feedback:** "What concept needs more clarification?" (short text)

Metrics Collected:

- **Comprehension score**
- **Relevance score**
- **Topics for deeper dive** (text)

How We'll Use Them:

- Plan follow-up deep-dives or job aids on low-scoring concepts.
- Update training materials with extra examples where needed.

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6. After Session #2: RTM Application Training Level One

When: End of basic RTM hands-on training
Audience: PSL users, Patient Safety/Quality, Risk Management

Survey Questions (4):

1. **Ease of use:** "How easy was it to find and complete your first task in RTM?" (5-point scale)
2. **Confidence:** "How confident are you can repeat this workflow?" (5-point scale)
3. **Feature gaps:** "Was there any feature you expected but didn't find?" (Yes/No + if yes, short text)
4. **Open feedback:** "What would improve your first-day experience?" (short text)

Metrics Collected:

- **Task-ease score**
- **Confidence score**
- **% feature-gap flag**
- **Top UX suggestions**

How We'll Use Them:

- Tweak UI labels, add missing mini-tutorials.
- Prioritize quick-wins in UI based on feature-gap flags.

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7. After Session #3: RTM Level Two (Workflow & Roles)

When: End of advanced RTM session
Audience: PSL users, Risk, clinical leads

Survey Questions (3):

1. **Workflow clarity:** "How clear are the handoff points between roles?" (5-point Likert)
2. **Usefulness of examples:** "Were the real-world scenarios helpful?" (Yes/No + short text if no)
3. **Open feedback:** "Which role's workflow needs more detail?" (short text)

Metrics Collected:

- **Clarity score**
- **Scenario usefulness**
- **Role-specific pain points**

How We'll Use Them:

- Refine role-based job aids; record mini-demos for tricky handoffs.

8. After Session #4: AEM Application Training Level One

When: End of AEM workflow training
Audience: Risk Management, PSL users

Survey Questions (3):

1. **Process fit:** "How well does the AEM module fit your existing processes?" (5-point Likert)
2. **Ease of documentation:** "How easy was it to document a potential risk event?" (5-point Likert)
3. **Open feedback:** "What would make event tracking smoother?" (short text)

Metrics Collected:

- **Process-fit score**
- **Documentation ease**
- **Key friction themes**

How We'll Use Them:

- Optimize form fields, reduce clicks, adjust terminology.

Milestone: Pilot Integrated Workflow on Staging
No survey—teams will flag issues in real time via our support channel.

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9. After Session #5: RTM Contributor Training Level One

When: End of contributor-focused RTM session
Audience: Clinical department contributors

Survey Questions (3):

1. **Relevance:** "How relevant was today's overview to your day-to-day tasks?" (5-point Likert)
2. **Ease of access:** "How easy is it for you to log in and find your tasks?" (5-point Likert)
3. **Open feedback:** "What support or documentation would help you most?" (short text)

Metrics Collected:

- **Relevance score**
- **Access ease score**
- **Requested support items**

How We'll Use Them:

- Create department-specific cheat sheets or quick links.

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10. After Session #6: VPS Solution Client Acceleration

When: End of advanced search & analytics tools session
Audience: PSL users, Patient Safety/Quality, Risk Management, clinical leads

Survey Questions (3):

1. **Feature mastery:** "How confident are you using the search & analytics features?" (5-point Likert)
2. **Value:** "How valuable are these advanced tools to your team?" (5-point Likert)
3. **Open feedback:** "Which report or metric would you add?" (short text)

Metrics Collected:

- **Mastery score**
- **Perceived value score**
- **Wishlist items**

How We'll Use Them:

- Adjust tooltips, add or prioritize new canned reports.

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11. After Monthly Client Check-in

When: Immediately after each 60 min check-in
Audience: PSL users, Patient Safety/Quality, Risk Management

Survey Questions (3):

1. **Meeting efficacy:** "How effective was today's check-in?" (5-point Likert)
2. **Action clarity:** "How clear are your next action items?" (5-point Likert)
3. **Open feedback:** "What agenda item deserves more focus next month?" (short text)

Metrics Collected:

- **Efficacy score**
- **Clarity score**
- **Suggested focus areas**

How We'll Use Them:

- Drive next month's agenda; spotlight recurring blockers.

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12. After Quarterly Executive Review

When: End of strategic 60 min review
Audience: Key Hospital Leaders, Patient Safety/Quality, Risk Management, PSL, clinical leads

Survey Questions (3):

1. **Strategic alignment:** "How aligned was today's discussion with your top 3 priorities?" (5-point Likert)
2. **Decision readiness:** "How ready do you feel to make next-quarter decisions?" (5-point Likert)
3. **Open feedback:** "What data or insight would strengthen future reviews?" (short text)

Metrics Collected:

- **Alignment score**
- **Readiness score**
- **Data requests**

How We'll Use Them:

- Tailor future decks with the right KPIs and benchmarks.

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13. After Semi-Annual Expert Safety Advisory (ESA) Workshop

When: Immediately after the 60 min data-driven workshop
Audience: Key Hospital Leaders, Patient Safety/Quality, Risk Management, PSL, clinical leads

Survey Questions (4):

1. **Insightfulness:** "How insightful were today's six-month harm-data patterns?" (5-point Likert)
2. **Impact potential:** "How likely is your team to act on these recommendations?" (5-point Likert)
3. **Workshop format:** "Was the format (data + discussion) effective?" (Yes/No + if no, short text)
4. **Open feedback:** "Which finding should we explore deeper next ESA?" (short text)

Metrics Collected:

- **Insight score**
- **Impact likelihood score**
- **Format approval rate**
- **Prioritized findings**

How We'll Use Them:

- Drive continuous improvement in your safety-culture roadmap.
- Deep-dive into top-ranked findings at the next workshop.

14. Net Promoter Score

When: Quarterly, first survey sent 90 days after production go-live (in advance of the first Quarterly Executive Review).
Audience: All active VPS users plus executive sponsors

Survey Questions (2):

1. **NPS prompt**: *"How likely are you to recommend Pascal Metrics VPS to peers in similar organizations?"* (0-10)
2. **Open-ended:** *"What's the primary reason for your score?"*

Metrics Collected:

- **Overall NPS** (%Promoters – %Detractors)
- **Segment NPS** (Execs vs Clinical vs IT vs Support)
- **Response rate**
- **Top promoter / detractor themes** (tagged from open comments)

How We'll Use Them:

- Track longitudinal client sentiment; benchmark vs industry NPS.
- Trigger CSM outreach to detractors within 24 h; log recovery actions.
- Feed promoter comments (with permission) into testimonials / case studies.
- Compare segment NPS to pinpoint training, UI, or documentation gaps.

15. CSAT / CES (Customer Satisfaction / Customer Effort Score)

When: Immediately after each support ticket closure and after major hands-on training sessions (e.g., RTM Level One, AEM Level One, go-live week).
Audience: Session attendees.

Survey Questions (2):

1. **CSAT:** "Overall, how satisfied are you with the help/training you received today?" (5-point Likert: Very dissatisfied → Very satisfied)
2. **CES:** "How easy was it to accomplish your task today?" (7-point scale: Very difficult → Very easy) *If respondent selects ≤3 (CSAT) or ≤4 (CES), show an optional text box:* "What made this difficult?"

Metrics Collected:

- **CSAT score** (mean and % >= 4)
- **CES score** (average; % 'easy' 6–7)
- **Driver themes** from open comments
- **Rolling 30-day trend**

How We'll Use Them:

- Flag high-effort workflows; prioritise UI/UX or documentation fixes.Maintain >90% CSAT for support & training; if rolling average <85%, trigger corrective action review.
- Measure CES shift after specific releases or process tweaks.
- Share monthly CSAT/CES dashboard with product & support leadership; feed into quarterly OKRs.

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16. Proposed Aggregation & Reporting

- **Weekly digest** of all numeric scores (CSAT, confidence, clarity, etc.) in a dashboard.
- **Monthly trend review** to catch session-level drop-offs.
- **Quarterly insights** fed into exec review prep—showing where training is succeeding or needs a refresh.
- **Text-analysis** on open comments (tag clouds, frequency counts) to spot recurring UX/CX issues.

APPENDIX

Virtual Patient Safety Solution Program Overview

VPS Launch (60 minutes)

Overview of Pascal Metrics and the Virtual Patient Safety (VPS) Solution. Review VPS program and the phases of implementation.
Attendees: Key Hospital Leaders (CEO, CNO, COO, CMO, General Counsel), IT Leadership, Patient Safety/Quality and Risk Management

VPS Technical Integration Kickoff (60 minutes)

Overview of the Virtual Patient Safety (VPS) Solution and technical integration requirements. Discuss key steps and milestones.
Attendees: IT Leadership and resources

MILESTONE: VPS Technical Integration Completed

Client IT and Pascal Metrics IT sign off that all Production interfaces have been verified. Pascal Expert Nurse Reviewers have full remote "read-only" access to client EHR.

VPS Clinical Program Kickoff (60 minutes)

Overview of Pascal Metrics and the Virtual Patient Safety (VPS) Solution and workflow. Review key resources and program milestones.
Attendees: Hospital leadership, Patient Safety/Quality, Risk Management, Patient Safety Liaison (PSL) user(s), and clinical department leaders

Session #1: Fundamentals of Pascal Safety and Risk Methodology (60 minutes)

Presentation of foundational principles and definitions for reliably measuring harm in Pascal VPS.
Attendees: Hospital leadership, Patient Safety/Quality, Risk Management, Patient Safety Liaison (PSL) user(s), and clinical department leaders

Session #2: RTM Application Training Level One (60 minutes)

Training of Patient Safety Liaison (PSL) users on basic software features, workflow, and handoffs.
Attendees: Patient Safety/Quality, Risk Management, and Patient Safety Liaison user(s)
Attendees will receive a login to the staging system after completing this session

Session #3: RTM Application Training Level Two: Workflow and Additional Features (60 minutes)

Discuss daily review and management of ECR driven events and roles that should investigate and respond to events.
Attendees Patient Safety/Quality, Risk Management, Patient Safety Liaison user(s) and clinical department leaders that will be RTM users

Session #4: Adverse Event Monitor (AEM) Application Training Level One (60 minutes)

Discuss the use of the AEM collaborative workflow module for identifying and securely documenting and tracking investigative activities related to Potential Risk Events.
Intended for Risk Management and Patient Safety Liaison users

MILESTONE: Pilot Integrated Workflow on Staging

Client Patient Safety Liaison (and initial clinical leaders) will conduct a pilot on the staging system to practice using the software as a team, and work through various workflow and handoff scenarios.

MILESTONE: Production Go-live

Client sign-off that client workflow has been defined and the team is ready to go live on the Production system.

Session #5: RTM Contributor Training Level One (60 minutes)

This session is intended for downstream clinical users who will be reviewing events in RTM. The session will provide a brief overview of the RTM workflow and the training will focus on the specific needs of the contributors of the system.
Attendees: Clinical department leaders

Session #6: VPS Solution Client Acceleration (60 minutes)

Advanced training for super users designed to elevate their use of document search and reporting & analytics tools.
Attendees: Patient Safety/Quality, Risk Management, Patient Safety Liaison user(s) and clinical department leaders

Monthly: Client Check-in (60 minutes)

The monthly client check-in is a regular meeting to review progress, share updates, and address challenges.
Attendees: Patient Safety/Quality, Risk Management, and Patient Safety Liaison user(s)

Quarterly: Client Executive Review (name??) (60 minutes)
A strategic, collaborative meeting held every three months
Key Hospital Leaders (CEO, CNO, COO, CMO, General Counsel), Patient Safety/Quality, Risk Management, Patient Safety Liaison (PSL) user(s), and clinical department leaders

Semi-Annually: Expert Safety Advisory (ESA) Workshop (60 minutes)
This workshop presents six months of adverse event data, highlighting patterns of harm, key findings, and opportunities for improvement.
Key Hospital Leaders (CEO, CNO, COO, CMO, General Counsel), Patient Safety/Quality, Risk Management, Patient Safety Liaison (PSL) user(s), and clinical department leaders