



Service Recovery: Before, During, and After Mistakes Happen

In this exercise, teams will co-design a patient-centered plan for service recovery that can be implemented on their unit.

Preparation (30 minutes): Ahead of the meeting, the facilitator should:

1. Familiarize yourself with negative patient experiences, or “Opportunities,” in the [Patient Experience dashboard](#). Alternatively, you could look at your department RLs from the last 6-12 months. Refer to [Patient Safety](#) for info on viewing past events in RL.
2. Assign a note-taker for the meeting and review the content with the notetaker.
3. Ask participants to read “[Service Recovery: Before, During, & After Mistakes Happen](#).”
4. Set the stage (example message):

“On [date], we will be discussing service recovery. Service recovery is the set of actions we take to understand a patient’s concerns, apologize, and find solutions to address issues. I’m interested in hearing your perspective on how we can [implement/improve] service recovery in our department. Prior to our meeting, please:”

- Read [this article](#) on service recovery.
- Consider: what are the most common mistakes you see in our department?
- Consider: what resources and tools could help repair these common mistakes?”

Co-Design Session (30–60-minutes, Meeting 1)

Introduction

During the meeting or session, start by building psychological safety.

“Today we’re going to be talking about something kind of vulnerable—what we do when we, either as individuals, teams, or an organization, mess up in patient care. It’s important to me that each of us feels safe to explore this topic, so I want to express a few thoughts before we begin:

1. I know that each of you is here because you care about patients, and it’s never your intention to cause harm.
2. At some point, each one of us will make a mistake or do something that causes a poor patient outcome or experience—that’s because we’re all human.
3. What matters is how we acknowledge, make right, and learn from our mistakes. Not only is this best for the patient, but it can also help us avoid [secondary trauma](#).
4. Our aim today is to discuss how to best deliver service recovery when mistakes are inevitably made.”

Continued, page 2.

Discussion

Next, facilitate a discussion using the following questions as a guide:

- 1. Have you, or someone you know, ever experienced a mistake in a business outside of health care? (At a restaurant, hotel, or online retailer, etc.)**
 - a. How did the business make it right? [Look for a mix of positive and negative experiences]
 - b. How did it affect your trust in the business?
- 2. What are the common mistakes we see in our department?**
 - a. [If most of the discussion centers on other groups' mistakes, you may need to prompt more department-specific examples, and circle back to psychological safety.]
- 3. Share your findings from your comment or RL review.**
 - a. [Ask participants if these themes match their personal experience. You may need to emphasize the importance of reporting anything that calls for service recovery.]
- 4. When you hear about a mistake like the ones we've mentioned, how do you make it right?**
 - a. Does this usually solve the problem?
 - b. If not, what would come closer to solving the problem?
- 5. If you could wave a magic wand, what resource or tool would you like that would help you correct mistakes?**
 - a. [Try not to constrain responses. You don't have to commit to anything; let participants use their imaginations. Ensure the assigned notetaker is capturing all ideas.]

Thank the attendees for their participation and explain that you will take their thoughts and merge them into a plan for service recovery.

After the meeting, fill out this template: [\[Department\]'s Guide to Service Recovery](#).

Present Service Recovery Plan (15–30-minutes, Meeting 2)

Present & Invite Feedback

- Thank the participants for their thoughts during the last session and explain that you have taken a first pass to combine their thoughts in a department plan for service recovery.
- Present the completed template: [\[Department\]'s Guide to Service Recovery](#).
- Invite feedback from the group: what is missing? What feels “off?” What feels right? [Remember to ask your notetaker to record feedback.]
- Let the team know where they can find this document. Invite them to comment on the document or talk to you if they have more ideas.

Explain any other logistics to implementing your service recovery plan (e.g., where to find gift cards, how to turn in receipts, assign team members to special assignments).

- We know leading an activity can be intimidating.**
[Click here to request a facilitated session](#)
—the PX Team is happy to help!
- Did you try it? [We'd love to know how it went!](#)**

Source: <https://accelerate.uofuhealth.utah.edu/improvement/service-recovery-before-during-and-after-mistakes-happen>

Questions? Contact: px@hsc.utah.edu