

Stage 1. Build rapport and relationship

Goal: to engage the person, build relationship and trust, establish credibility of the assessment.

- Explain the purpose of assessment report and interview; i.e., to provide:
 - A sense of how they're performing;
 - A chance to describe their practice and work environment;
 - Data that can present opportunity for improvement.
- Outline the agenda to:
 - Review performance data and gaps;
 - Discuss their reactions to the data and what it means to them;
 - Developing an action plan from the data.

Stage 1 Phrases and Strategies

- "Tell me about your experience in completing this assessment"
- "I'd like to hear about your practice (setting, patients, challenges, what you enjoy)"
- "Would you like to hear more about the assessment process?"
- "What struck you about this report?"

Confirm what you're hearing; empathize, show respect; build trust; validate.

Relation-building is central and needs attention throughout the interview.

Stage 2. Explore reactions to and perceptions of the data/report

Goal: for physician to feel understood and that their views are heard and respected.

Stage 2 Phrases and Strategies

- "What were your initial reactions? Anything particularly striking?"
- "Did anything in the report surprise you? Tell me more about that..."
- "How do these data compare with how you think you were doing? Any surprises?"
- "Based on your reactions, is there a particular part that you would like to focus on?"

Negative reactions/surprises tend to be more frequently elicited by:

- Subjective data such as multisource feedback, than by objective data such as chart audit
- Comparative data, when scores are lower than the group mean
- Data identifying one is not doing as well as they thought
- Be prepared for expression of negative reactions in these cases. Support expression of negative reactions using general facilitative approaches and explore reasons for these reactions.

Stage 3. Explore physician understanding of the content of the data/report

Goal: for the physician to be clear about what the data mean for their practice and the opportunities suggested by the data for change.

Stage 3 Phrases and Strategies

- "Was there anything in the report that didn't make sense to you?"
- "Anything you're unclear about?"
- "Let's go through section by section."
- "Anything in section X that you'd like to explore further or comment on?"
- "Anything that struck you as something to focus on?"
- "Do you recognize a pattern?"

Knowledge of the speciality and areas where opportunities frequently arise for improvement can be helpful.