INTRODUCTION

This Leader’s Guide includes everything you need to successfully facilitate a customer service recovery workshop for healthcare employees. Based on the DVD, CUSTOMER SERVICE RECOVERY: The Right Words at the Right Time, this workshop is both practical and motivational. This Leader’s Guide is divided into the following sections:

- Introduction
- Getting Started
- Conducting the Training
- Class Aids

The Right Words

When you work with patients and their families, you usually don’t see people at their best. Anxiety, fear, grumpiness or pain may cause them to say things that they ordinarily wouldn’t say. The question is: when it happens to your employees, do you know what they would say in return?

The reality is that most of us don’t know what we would say when challenged by an upset patient or family member. That is, unless we thought about it in advance and we were prepared. That’s what this workshop is all about: figuring out what to say and how to say it. While the specific words we say may differ based on the situation, the kinds of things we say and how we say them matter greatly.

So, as their manager, how do you get your employees to focus on saying the right words at the right time when faced with a frustrated or upset patient or family member? How do you give your employees an understanding that what they say and how they say it is important?

This workshop is a great first step.

About This Training

The focus of this training is to help healthcare employees handle challenging situations. Specifically, it deals with the right words to say when a patient or family member:

- Is disappointed with the quality of care they’re receiving
- Is frustrated or angry
- Goes over the line
- Gets personal
The Right Words at the Right Time DVD

The video/DVD, The Right Words at the Right Time, models desirable employee behaviors when they are faced with difficult patient situations. Healthcare employees will find that the scenarios are realistic and the message is practical. This Leader’s Guide will help you guide the discussion for your work setting.

Your Role

Whether you are a manager or a trainer, your role is to create and facilitate an interactive environment, which promotes learning. Ask questions. Encourage discussion, thinking, and reflection, and help participants understand how the training relates to their specific world. Keep the class energized as you guide their learning.

Learning Objectives

AT THE END OF THIS WORKSHOP, PARTICIPANTS WILL BE ABLE TO:

• List the three signals of handling disappointed or upset patients, family members, and visitors.
• Describe what each signal looks like.
• Describe things they shouldn’t say to patients, family members, or visitors.
• Identify the best response to a given challenging scenario.

GETTING STARTED

Preparing for Your Meeting

The most important thing you can do before you teach this workshop, is prepare. Get familiar with the DVD/video. Get comfortable with this Leader’s Guide. Think about problems that may be specific to your healthcare venue. Consider the specific challenges that face your employees.

Preparing Your Follow-up

Once your team members walk out of your workshop, it may seem as if your job is done. But, follow up is critical. It tells them that what they learned is important. It reinforces everything they learned and also gives them the opportunity to ask additional questions.
How you follow up will depend on your time, resources, demands and department culture.

The ideas here range from simple check-ins to a more formal process:

- **RECOGNIZE SUCCESSES!** Have employees submit examples of when they had the right words at the right time and turned a disgruntled patient or family member into a satisfied one.
- **CONSIDER:**
  - Emailing success stories
  - A Wall of Fame board
  - An Employee of the Month
- **SCHEDULE A FOLLOW-UP COFFEE BREAK OR LUNCH** 30 or 60 days after the training. Use a brown-bag coffee break or lunch hour to informally discuss what’s worked, what’s been challenging and any issues related to the training.
- **CALL PARTICIPANTS** at random within 30 days of the training. Ask them specific questions to ensure their understanding of the content or to ensure they have transferred the skills they learned. This can be time consuming but is a great way to build relationships with your team members and coach one-on-one.
- **OBSERVE.** Catch your team members in the act of saying the right words at the right time when dealing with a customer problem. Praise them verbally or write them a note that lets them know that you appreciate the great job they are doing.
- **BE CREATIVE AND HAVE FUN.** The follow-up is not an effort to make more work for you but, rather, to reinforce the learning.

## Training Meeting Preparation Checklist

To help you organize your thoughts and prepare for your training workshop, we’ve included a preparation checklist and agenda.

- [ ] Read this Leader’s Guide.
- [ ] Watch the **CUSTOMER SERVICE RECOVERY: The Right Words At The Right Time** video/DVD.
- [ ] Determine the length of your workshop using the Training Time Estimates table on the following page.
- [ ] Get giveaways, (candy, bubble gum, inexpensive trinkets, buttons, noisemakers, hats, etc.) to add another dimension of fun.
- [ ] Post Workshop Notice (reproducible copy is in the Class Aids section).
- [ ] Get enough postcards or Letter to Myself (reproducible copy in the Class Aids section) so you have one per participant
- [ ] Reserve equipment and meeting room.
- [ ] Prepare flip charts or familiarize yourself with the PowerPoint slides.
# Training Time Estimates

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Tips for Conducting a Successful Meeting

Before we get into the specifics of the program, let’s go through a few basic training tips:

• **Start on time and end on time.** Show your participants that you respect them and their time. Start on time to reward those who arrive promptly.

• **Take breaks at odd intervals.** Tell your class to return in seven minutes, or start your break at 11:33 and tell participants to return in exactly 10 minutes. Participants are more apt to return promptly because of the specifics of your request. It’s more fun too!

• **Assign group leaders** the responsibility for rounding people up at the end of a break.

• **Make the learning fun.** As the leader, it’s your responsibility to keep things going. Ask a lot of questions and facilitate small-group discussions. Reward participation by throwing out gum or awarding lollipops or other giveaways for realistic ideas.

• **When the energy level starts to dip, get your participants out of their seats.** Ask questions and reward answers. Or, give participants a break and have them return to a fast-paced Q & A contest. Give prizes for Q&A summary games or reward small groups for returning from break on time. Be creative!

• **Tell the class that you will follow up** to help ensure that learning took place; then do so!
Flip Charts / PowerPoint Slides

1. CUSTOMER SERVICE RECOVERY - CHALLENGING STORIES

   DIFFICULT OR DISAPPOINTED:
   - PATIENTS
   - FAMILY MEMBERS
   - VISITORS

2. SENDING THE FIRST SIGNAL
   - “I care.”
     - I’m sorry
     - I’m Listening

3. SENDING THE SECOND SIGNAL
   - “I understand.”

4. SENDING THE THIRD SIGNAL
   - “You can trust me to take care of this.”

5. THE RIGHT WORDS TO SHOW TRUST
   - “For you.”

6. THE RIGHT WORDS TO CALM
   - “Would you be willing...?”
   - “Would it be alright if...?”
     - BUILD TRUST
     - GIVE CONTROL

7. THE RIGHT WORDS WHEN A PATIENT OR VISITOR IS:
   - RUDE
   - TOO PERSONAL
   - CLUELESS
   STAY POLITE AND PROFESSIONAL

8. THE RIGHT WORDS
   - WHEN YOU CAN’T SAY “Yes”
   - NEVER START WITH A “No”
   - PRESENT OPTIONS
CONDUCTING THE TRAINING

Welcome

WELCOME employees. EXPLAIN that they can expect:

• Practical ideas for handling difficult customer situations.
• Words to help them calm a frustrated or upset customer.
Note: If you have candy, gum, or small give-a-ways, explain that you will be throwing them out for participation and good ideas.

REVIEW the learning objectives.

Learning Objectives

TELL participants that at the end of the workshop, they will be able to:

• List the three signals of handling challenging patient and family situations.
• Describe what each signal looks like.
• Describe things they shouldn’t say in front of patients, family members, or visitors.
• Identify the best response to a given challenging scenario.

Icebreaker: Say What?

DIVIDE employees into four groups. ASK for three volunteers (no more than one from any group). EXPLAIN to the group that:

• While you talk with the volunteers you would like the rest of the group to talk about challenging situations they have experienced with patients or family members.
• Within their groups, they should discuss:
  • Disappointed or difficult patients, family members, or visitors
  • What happened

POST flip chart 1: When you…

REFER participants to flip chart. Then, take volunteers outside the room where the other participants can’t see you or hear you. TELL volunteers that:

• The icebreaker is designed to illustrate that what we say and how we say it are two different things.
• They will all say the same words but each will present it in a different way.
• You will set up the scenario for the class and they will take turns responding.
• The scenario is: A co-worker comes in with a new haircut. They will say, “Wow. Nice haircut. It looks really good.”
• You need one volunteer to be overly enthusiastic, one to be genuine and sincere, and one to be sarcastic.
• You have a handout for them, which explains how they should say the words.

ASK volunteers to choose roles. Then, GIVE them the appropriate Icebreaker handout (located in the Class Aids section of this Leader’s Guide).

ASK each volunteer to practice a couple times. COACH them and when they’re ready, return to the class.

✓ Conducting the Icebreaker

ASK

What does it look like when you have the right words to say to an upset patient or family member?

Suggested answers include: listening, apologizing, and solving their problem.

Note: Draw out their ideas, but don’t comment on them. The purpose of this is only to introduce the topic.

ASK for a show of hands.

How many of you have had frustrated or upset patients or family members?

SAY

We all have. We may also have times in which we were the upset or frustrated patient. It happens. The question is, how do you handle it when it happens to you? We’re going to discuss one or two of your stories later in the workshop.

Right now, I’m going to have you imagine an ordinary workday. You arrived to work on time. You’re in a good mood. As you walk in, you pass a co-worker who says:

NOD toward each of the volunteers, who say, “Wow! Nice haircut. It looks really good.”

THANK the volunteers and ask them to return to their groups.

✓ Debriefing the Icebreaker

ASK

Which of our volunteers was most sincere?
Volunteer #2.

Why?

Answers may vary.

Note: Tone of voice, inflection, facial expression, and body language are all possible answers. If there is disagreement about whether volunteer #1 was more sincere, talk about why. Lead the discussion to draw out the idea that it is how the person says the words that convey the message.

What signal did volunteer #1 send?

Insincere.

Volunteer #3?

Sarcastic.

ASK

If your words and the signals you send, don’t match, which speak louder?

Your signals.

Why is that important when dealing with customers?

You need to make sure you’re sending the right signals.

EXPLAIN:

• All three volunteers said the same words.
• All three conveyed different signals.

SAY

We’re going to watch a DVD that will give you the right words and the right signals.

The Right Words at the Right Time DVD/Video

PLAY the DVD/video.

✓ Discussion

SAY
In the video, there were several different scenarios with patients and family members. The words the employee used were different, based on the problem, but the signals were the same.

ASK

What are the three signals?

I care; I understand; and you can trust me to take care of this.

✓ The First Signal: I Care

ASK

What words should you say to help send the signal that you care?

I’m sorry.

POST flip chart 2: I Care.

ASK

After you’ve said you’re sorry for the problem, what else should you do for an upset patient or family member, to send the signal that you care?

Listen.

Why does listening send the signal that you care?

You’re giving the patient or family your undivided attention. Allowing them to vent will help calm them.

SAY

An upset customer needs to be heard. Apologize. Then, be quiet and keep your own emotions out of it.

POST flip chart 3: I Care.

✓ The Second Signal: I Understand

ASK

Sending the signal, “I understand” is more than just saying the words. What kind of body language sends the signal “I understand?”

Eye contact. Patience. A sincere tone of voice.
ASK

When you “send the signal that says you understand” what are you understanding?

Their problem and how they feel.

SAY

After you show your patient you care by saying you’re sorry and listening, sending the signal “I Understand” means saying you understand and how they must feel. It is both understanding their concern and empathizing.

ASK

Who would like to share a story you discussed in your groups earlier. How did you show the patient or family member that you understood?

FACILITATE discussion to bring out the following points:

• Saying you understand means you understand their concern.
• Your actions need to send the signal that you also understand how they feel.

POST flip chart 4: I Understand.

✓ The Third Signal: You Can Trust Me to Take Care of This

ASK

What’s the third signal?

You can trust me to take care of this.

What two words are the beginning of trust?

For you.

POST flip chart 5: Shows trust.

Why are the words “for you” so powerful?

It tells your patient that you’re on their side and that you’re going to be working on their behalf.

ASK
There were a couple examples of permission phrases in the video. Who remembers them?

Would you be willing to...?
Would it be alright if...?

What happens when you ask a frustrated patient or family member for permission to help?

You give your patient control which helps calm them when they may be feeling out of control.

POST flip chart 6: Permission Phrases

EXPLAIN that even patients or family members who don’t trust you to help often will come around when you ask permission to try.

SAY

Now let's talk about what to do when a customer crosses the line.

✓ When a Patient or Family Member Crosses the Line

ASK

What do you do when a patient or family member is rude or too personal?

Stay polite and professional.

What do you say if your customer gets too personal and keeps pushing?

Stay polite and professional and say something like, “Is there something I can help you with today?”

POST flip charts 7 and 8: Rude or Personal.

What Do You Say When You Can’t Say Yes?

ASK

What is the most important thing to remember never to do when you can’t say yes to a patient or family member?
Never say no.

Why is it so important not to say no? What happens to the patient when you say something like, “No, that’s impossible” or “No, we can’t do that.”

It generates negative feelings. The patient may get more frustrated, angry or upset.

We all know there are times when you can’t say yes to a patient or family request. In those instances, what can you do?

Ask permission to go through options, and stay polite and professional.

Activity: Things You Should Never Say

Distribute a piece of flip chart paper to each group. Explain that groups will have only a couple of minutes to complete the activity.

Tell groups to write down things they should never say to a patient, family member, or visitor. Give employees only a minute or two and then debrief.

Note: This should be a quick, fun, energizer.

☑ Debrief

Explain that each group will share their answers. If the group gives an answer that no other group has on their list, then they get a point. Only unique answers get a point. Groups with the most points at the end wins.

Note: Give gum or small giveaways to winning team.
SUGGESTED ANSWERS

“I don’t know.”
“We can’t do that.”
“You’ll have to…”
“i just work here.”
“My shift is ending.”
“I just got here.”
“My last patient was…”
“I can’t wait to get out of here.”
“I haven’t had my break yet.”
“It’s up to the insurance companies.”

Activity: The Best Response

EXPLAIN:

• The next activity will give them an opportunity to determine the best response to a challenging situation.
• You will show them a video clip and three employee responses.
• They should discuss in their groups which response – a, b, or c – is best and why.

“XTRA TRAINING” Scene 1

PLAY video practice clip 1. Following the clip, give participants a couple minutes to discuss which response is best and why.

SCENE 1: MARY KAY AND HEATHER

Mary: “Look, I was up all night with her..!”

Heather: A. “I’m sorry you had to bring her in... ...what’s better for her and you?”
B. “I’m sorry for the mix up... ...should I change it for you?”
C. “Believe me, it’s one of those days... ...willing to wait?”
Scene 1 Debrief

ASK for a show of hands.

Who believes Heather’s best response was a? How about b? And c?

GENERATE discussion about why “a” was the best response.

ASK questions to ensure the following points come out during the discussion:

- Heather sent the signals “I care and I understand.”
- Her words and tone of voice show patience and caring for both the grandmother and the granddaughter.
- She empathizes with what it means to take a sick child out.
- She offers options.

SAY

Now, let’s look at the other responses again and talk about what Heather did well and what she could have done better.

PLAY response “b” again.

SCENE 1: MARY KAY AND HEATHER

Heather: B. “I’m sorry for the mix up... should I change it for you?”

ASK

What’s going on in this scene? What signal is Heather sending?

Heather shows caring but she isn’t thinking of the child or her grandmother. She is matter-of-fact about what happened.

What does Heather do well and what could she do better in this scene?

ASK questions to ensure the following points come out during the discussion:

- Heather shows caring by apologizing and tries to build trust by offering options and using the words, “for you.”
- But, she shows no understanding or empathy about bringing out a sick child, or understanding the inconvenience.

PLAY response “c” again.
SCENE 1: MARY KAY AND HEATHER

Heather:  C. “Believe me, it’s one of those days... willing to wait?”

ASK

What’s going on in this scene? What signal is Heather sending?

Heather shows understanding but she doesn’t apologize. She makes it more about her than Mary Kay and her sick granddaughter.

What does Heather do well and what could she do better in this scene?

ASK questions to ensure the following points come out during the discussion:

- Heather understands and acknowledges how frustrated Mary Kay must be.
- Heather begins to build trust by using the words “for you” but isn’t really connected to Mary Kay’s problem.
- She needs to apologize and show she cares.
- She also needs to show empathy and say something more to build trust so that Mary Kay feels like she really wants to help.

“XTRA TRAINING” Scene 2

PLAY video practice clip 2. Following the clip, give participants a couple minutes to discuss which response is best and why.

SCENE 2: BRAD AND ALYCA

Brad:  “Why are you sending me a bill... I don’t have that right now!”

Alycia:  A. “Unfortunately, like you, we are also at the mercy... Would that help?”

B. “I’m sorry you received an unexpected bill... reimburse you?”

C. “I’m sorry you received a bill now... payments on our end.”

Scene 2 Debrief

ASK for a show of hands.

Who believes Alycia’s best response was a? How about b? And, c?
GENERATE discussion about why “c” was the best response.

ASK questions to ensure the following points come out during the discussion:

- Alycia sent the signals “I care and I understand.”
- Her tone was empathetic, caring, and patient.
- She realizes that her customer is upset about the bill and worried about the financial implications.

SAY

Now, let’s look at the other responses again and talk about what Alycia did well and what she could have done better.

PLAY response “a” again.

SCENE 2: BRAD AND ALYCIA

Alycia: A. “Unfortunately, like you, we are also at the mercy... ...Would that help?”

ASK

What’s going on in this scene? What signal is Alycia sending?

Alycia shows understanding about the problems but she has no idea how the customer is feeling.

What does Alycia do well and what could she do better in this scene?

ASK questions to ensure the following points come out during the discussion:

- Alycia understands the problem but not the uniqueness of the problem for the customer.
- Her tone suggests that she does this every day, it’s not a big deal, and it’s just the way things work.
- She uses the words “for you” but they seem more like an afterthought than a genuine means to address the customer’s concern.
- She needs to apologize, show caring, and send the signal that she truly understands.

PLAY response “b” again.

SCENE 2: BRAD AND ALYCIA

Alycia: B. “I’m sorry you received an unexpected bill... ...reimburse you?”
**ASK**

*What’s going on in this scene? What signal is Alycia sending?*

*Alycia shows caring but doesn’t understand -- although she tries by saying it’s “no fun.” She seems unsure.*

*What does Alycia do well and what could she do better in this scene?*

**ASK** questions to ensure the following points come out during the discussion:

- Alycia apologizes and shows caring.
- She tries to understand how the customer feels, by saying “it’s no fun” but she comes across as inexperienced and unsure.
- She doesn’t build trust or send the signal that she can be trusted to take care of the problem.

**“XTRA TRAINING” Scene 3**

**PLAY** video practice clip 3. Following the clip, give participants a couple minutes to discuss which response is best and why.

**SCENE 3: ANDY AND SHARVA**

Andy:  “WHAT? He’s a Physician’s Assistant...appointment was with a Doctor!”

Sharva:  
A.  “I’m sorry, your appointment is with Dr. Miller... ...I’m sure you’ll like him.”
B.  “I know, believe me I understand... ...what’s best for you?”
C.  “I’m sorry for the confusion... ...What would be best for you?”

**✓ Scene 3 Debrief**

**ASK** for a show of hands.

*Who believes Sharva’s best response was a? How about b? And, c?*

**GENERATE** discussion about why “c” was the best response.

**ASK** questions to ensure the following points come out during the discussion:

- Sharva sent the signals “I care and I understand.”
- She shows patience without being patronizing.
• She was polite and professional and didn’t react emotionally to Andy’s anger.
• She offered options.

SAY

*Now, let’s look at the other responses again and talk about what Sharva did well and what she could have done better.*

PLAY response “a” again.

SCENE 3: ANDY AND SHARVA

Sharva: A. “I’m sorry, your appointment is with Dr. Miller... ...I’m sure you’ll like him.”

ASK

*What’s going on in this scene? What signal is Sharva sending?*

*Sharva apologizes but it’s clear that she doesn’t understand. Her tone is dismissive and patronizing.*

*What does Sharva do well and what could she do better in this scene?*

ASK questions to ensure the following points come out during the discussion:

• Sharva apologizes but she doesn’t try to understand why Andy is frustrated.
• She reassures Andy but dismisses his concern.
• She needs to understand and build trust.

PLAY response “b” again.

SCENE 3: ANDY AND SHARVA

Sharva: B. “I know, believe me I understand... ...what’s best for you?”

ASK

*What’s going on in this scene? What signal is Sharva sending?*

*Sharva understands the problem but doesn’t try to understand how Andy is feeling. She jumps in quickly and gives the same answer she has probably given to other patients already.*
What does Sharva do well and what could she do better in this scene?

**ASK** questions to ensure the following points come out during the discussion:

- Sharva understands that Andy is angry but she is matter-of-fact about it.
- She needs to show caring by apologizing.
- She shouldn’t point out that they called him; that could put him on the defensive.
- She needs to build trust by being patient and tolerant of why Andy is upset.

**Wrap-up**

**DISTRIBUTE** postcards or Letters (located in Class Aids section of this Leader’s Guide).

**TELL** participants to write three things they want to remember from this workshop. **EXPLAIN** that you will send the letters to them in a few weeks.

**COLLECT** letters.

**THANK** participants for attending.
CLASS AIDS

WORKSHOP NOTICE

ICEBREAKER SCRIPT NOTES

LETTER TO ME
Workshop Notice

We are getting together for a workshop, titled, *The Right Words at the Right Time in Healthcare*, which is scheduled:

**DATE:**

**TIME:**

**PLACE:**

The focus of this training is to help you handle challenging patient and family interactions. Specifically, it deals with the *right words to say* when a patient or family member:

- Is disappointed with our procedures or quality of service
- Is frustrated or angry
- Goes over the line
- Gets personal

At the end of this workshop, **you will be able to:**

- List the three signals of handling challenging patient and family situations.
- Describe what each signal looks like.
- Describe things you shouldn’t say in front of patients, family members, or visitors.
- Identify the best response to a given challenging scenario.

During the workshop you will watch *The Right Words at the Right Time*, which presents realistic and practical ways for dealing with tough patient or family member situations.
Icebreaker: Say What?

**SCENARIO:** You are having an ordinary work morning. You arrived to work on time. You’re in a good mood. You pass a co-worker who says, “Wow, nice haircut. It looks really good.”

**VOLUNTEER #1:**

You are the co-worker. You should be “over-the-top” with enthusiasm about how good the haircut looks. You should be so enthusiastic that listeners will question your sincerity. Your manner should be effusive and you should quickly glance away and back again as you’re talking.

You’re sending the signal, “I care about you as my co-worker so I am going to say something flattering, but I don’t really mean what I am saying.”

For example: “WOW! Nice haircut. It looks REALLY good!”

**SCENARIO:** You are having an ordinary work morning. You arrived to work on time. You’re in a good mood. You pass a co-worker who says, “Wow, nice haircut. It looks really good.”

**VOLUNTEER #2:**

You are the co-worker. You should be genuine and sincere. You noticed the haircut and you like it. You should maintain eye contact, emphasize naturally, and your facial expressions should be natural and kind.

You’re sending the signal, “I care about you, and I really mean what I am saying.”

For example: “Wow! Nice haircut. It looks really good!”

**SCENARIO:** You are having an ordinary work morning. You arrived to work on time. You’re in a good mood. You pass a co-worker who says, “Wow, nice haircut. It looks really good.”

**VOLUNTEER #3:**

You are the co-workers. You should be sarcastic. Listeners should wonder why you opened your mouth at all.

You’re sending the signal, “I know you but don’t really care about you. I actually don’t even like you too much.”

For example: “Wow. NICE haircut. It looks really good.”
Letter to Myself

The three things that were most meaningful to me during The Right Words at the Right Time Workshop are:

1. 

2. 

3. 

I will incorporate these concepts into my interactions with my patients and their family members.

Signed ____________________________________________