



*making it easier to succeed*

**CATALYST  
TECHNOLOGIES**

## **A NINE STEP APPROACH TO ENSURING A SUCCESSFUL WELLNESS PROGRAM**

### **Current Wellness Programs Lack Proactive Patient Management**

VA hospitals focus on wellness programs to support patient recovery and chronic illness management. For the latter, wellness programs offer an opportunity to reduce patient load of less severe, chronic illnesses, such as blood sugar regulation for diabetes or eating management for obesity conditions. Patient load reductions of chronic conditions support the VA goal of increased treatment of more acute illnesses. Yet, all current day wellness programs do not ensure that patients have the willingness and ability to be successful. These factors are not tracked, or reacted to properly when issues do arise. In essence, wellness programs are limited, or fail, because the patients' capabilities and motivations are not properly managed to ensure success. The result is that more programs fail, less acute injuries are serviced and negative financial impacts to hospitals are experienced.

### **The Nine Step Approach to Ensuring a Successful Wellness Program**

The key to an effective wellness program is the proactive management of a patient's willingness and ability to be successful in completing the assigned tasks described within wellness programs. Our nine step approach consists of using straight-forward intake forms that support and document the effectiveness of proactive management. The approach, based on peer support, increases a patient's willingness and ability to become more successful in following their wellness program activities. The intake forms allow for self-assessment, communication and fulfillment of needs that cause greater success in following a wellness program. Uniquely, this approach can be quantitatively followed to provide visibility of the group's likelihood of success. The data can be used to populate any people-analytics dashboard. A theory of constraints analysis is applied to the numeric conversion algorithm, combined with a weighting factor defined by the hospital, to determine the urgency of patients lacking the willingness or ability to succeed in their program.

Based on urgency regarding likelihood of success, patients whom have given their permission for group support under the supervision of a qualified nurse, address their own issues. The nurse acts as a facilitator, ensuring that discussions do not involve medical advice. Instead, the discussions are based on sharing individual experiences with regard to concerns and solutions that increase ability and willingness to be more successful in following his or her wellness program. The communication protocol used (see Step 6 below), proven over the last 20 years, creates safe and constructive group dynamics to improve likelihood of success.

Any issues that require medical expertise are flagged by the nurse and reported as outstanding action items. All discussions and solutions are captured by the intake form and attached as part of the patient's file. These files can be easily accessed by the patient. Action items not requiring medical expertise are also tracked. The peer supported solutions are tracked and measured in terms of increased likelihood of success in following the wellness program. Lessons learned are documented, i.e., "what worked" and "what didn't work," in a personalized e-journal in support of individual and group learning.

We developed a single, simple-to-use intake form that facilitates and documents all nine steps (described below) of this common-sense, proactive approach to improve a patient's likelihood of success. The intake form is simple to use, optimizes a patient's likelihood of success and takes minutes to complete.

The intake form facilitates and documents the nine step approach as follows:

1. Identifies what would motivate the patient to succeed within the program
2. Identifies the wellness program tasks/activities necessary for the patient to succeed
3. Has the patient assess these tasks/activities in terms of willingness and ability to succeed
4. Imports to a “theory of constraints” algorithm to identify patient priority in receiving group support
5. Allows the nurse to easily identify and resolve any “simple” issues, like task/activity explanations, or get permission from the patient to be supported by the group if a low likelihood of success is identified
6. Using the automation within the form, makes it easy for the nurse to organize, facilitate and document meeting results specifically describing the:
  - a. Accountability (A) of each patient to follow his or her program more successfully
  - b. Communication (C) of peers to effectively support each other in being more successful
  - c. Creativity (C) of group in supporting each patient’s limiting paradigms about being successful
  - d. Empowerment (E) of each patient to be more successful in following the program
7. Tracks the success of the patient and submits the forms to automatically populate a people-analytics dashboard for visibility into the group’s potential for successfully completing their wellness programs.
8. Collects patient observations after completing Wellness Program tasks/activities to determine:
  - a. Successes, issues and concerns used as lessons learned data for e-journal entries
  - b. A need for further support of the patient in improving his/her capability and/or motivation
9. Provides additional peer support based on patient observations to:
  - a. Become more successful by following the discovered lessons learned guidance
  - b. Provide peer solutions to improving each patient’s ability and/or willingness to be more successful/increase the likelihood of success with his or her wellness program

## **Successes Show Nine Step Approach is Ideal for Wellness Application**

This nine step approach, combining peer support using these specialized communication and likelihood of success improvement techniques, has been applied and refined over the last 20 years in a variety of business environments with great success. It has been used by government and commercial organizations to improve an employee’s ability and willingness to successfully complete tasks/activities. Participants using the approach have considered it to be a life saver in creating more personal success in completing assigned tasks. The nine step approach is in alignment with many successful programs that use peer support to better manage chronic conditions, including weight reduction, exercise maintenance, and drug and alcohol recovery. The self-assessment and improvement approach has been refined over several decades to become both quick and easy to use. Uniquely, when using our intake form, patients will be able to (1) accurately describe their readiness to succeed, (2) safely identify issues and concerns, (3) provide constructive guidance to other patients based on their experience, and (4) quantitatively show increased success in following their wellness programs. Case studies and testimonials are available upon request.

## **Suggested Next Steps**

Based on past successes, migration of the nine step approach into hospital environments is a natural next step. We suggest a pilot program lasting for a period of three to five months in order to collect sufficient comparison data. The pilot requires two groups of equal size, where results can provide a sufficient statistic for conclusions, having similar chronic conditions involving diabetes and weight control. One group would use the intake form to follow the nine step approach, as compared to the other using current hospital wellness program practices. The pilot would compare the two groups in terms of (1) successes in following the wellness program, (2) reduction in hospital patient chronic services, and (3) financial value to the hospital due for increased wellness program successes.