**Setting Up for Success**

**Set Up and Evaluation**

* How do you plan to measure the success of Care Opinion in your organization?

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* What metrics or data points are most important to your team?

*(e.g., number of stories, response rates, themes, story-to-change tracking)*

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* Do you plan to integrate Care Opinion insights into existing quality improvement or patient experience initiatives?  ☐ Yes ☐ No

**Baseline Metrics**

*These data points help us support you over time and track changes in story volume, quality, and impact.*

* Average number of patient feedback reports collected monthly (*prior to Care Opinion*): \_\_\_\_\_\_\_\_\_\_\_\_
* Current patient satisfaction survey response rate (*if applicable*): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Estimated number of patient encounters per month:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Any specific benchmarks or KPIs you’re aiming to improve? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Any specific benchmarks or KPI’s you are required to collect?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Communication and Internal Engagement**

* How do you plan to introduce and promote Care Opinion within your organization?

*(Include staff, physicians, and patients in your response*)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Do You Need Help Setting Up a Feedback Page on Your Website? ☐ Yes ☐ No
* Have you identified internal champions or leads for the rollout of Care Opinion?

☐ Yes ☐ No

If yes, please list names/roles: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***\*\*\*Your onboarding includes a support session with our internal communications team designed to support your promotion of Care Opinion to your staff & storytellers. Our communication team will reach out to you to book your session upon completion of your onboarding session.***

## Checklist with solid fillImplementation Milestones

• **Story Promotion Strategy***: (Plan to promote Care Opinion to patients, families, or community)*

Target Date**:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

• **Staff Awareness & Internal Launch**: (*Inform staff, share login info, training complete)*

Target Date**:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

• **First Stories Live**: (*Target date to start receiving stories)*

Target Date**:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**• First Report Run**: (*When you'd like to receive your first feedback report)*

Target Date**:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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