

# Measuring User Engagement with KaiNexus

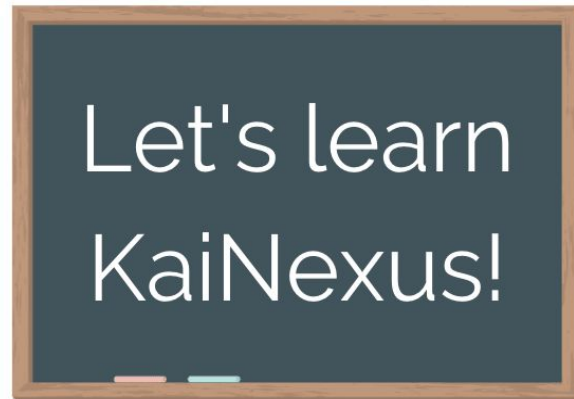


**Alissa Stansbery**

Project Management Office  
Coordinator

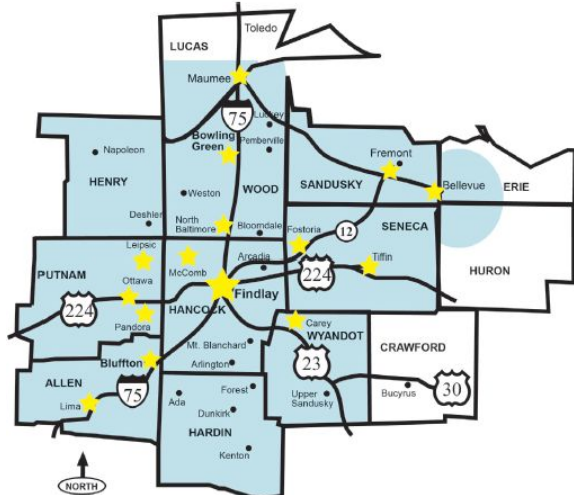
# Learning Objectives

- Understand how to use KaiNexus' reporting tool to view user engagement
- Understand benefits of putting data from reports into a threshold chart to visualize trends
- Learn the impact of defining and measuring success





*Not-for-profit health system based in Findlay, Ohio serving 8 counties*



2

Ambulatory Hospitals



86,527

Primary Care Visits



8,144

Inpatient Admissions



3,452

BVHS Associates



1,188

Hospice Patients



833

Long-Term Care & Assisted Living Clients



1,690

Home Health Patients



473

Volunteers



236,173

Specialty Care Visits



43,855

Emergency Visits



14,060

Hanco EMS Responses

*Our Mission*

**Caring for a lifetime.**

*Our Vision*

**Extraordinary people. Exceptional care.**

*Our Values*

**Integrity, Compassion, Skill, Collaboration, Innovation & Humor**

# BVHS Project Management Office

Currently consists of **9**  
associates

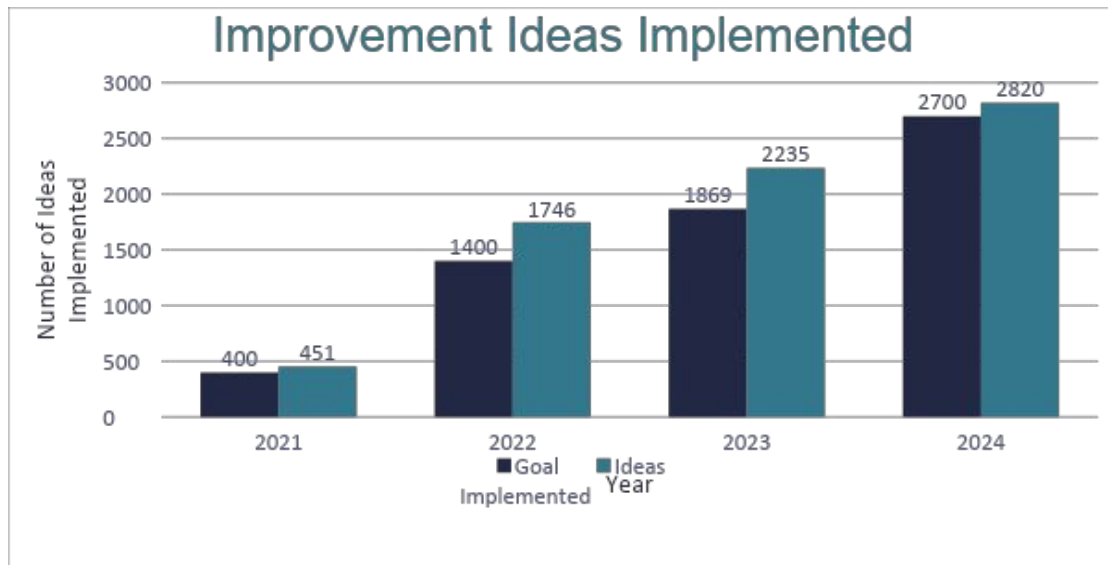


# Background

- Rolled out KaiNexus in 2021
  - ~3,400 associates
  - ~250 leaders

**General Users:** Leaders who will manage work in KaiNexus.

**Capture Users:** Associates who can submit and keep track of their own items in KaiNexus, but need much less access to the system.



Initial Measure of Success

## Quantity vs Quality



“What is not defined cannot be measured.  
What is not measured, cannot be improved.  
What is not improved, is always degraded.” –  
William Thomson

**DMAIC**: A data-driven problem-solving methodology used in Lean Six Sigma to improve existing processes and identify inefficiencies.



# Define – What does “good” look like?

- **Priority One:** Engage more people in improvement for an accelerated rate of change and maximum impact.
- **Priority Two:** Take the heavy lifting of improvement off of our leaders while increasing transparency and communication for everyone

# What does “engaged” look like?

- Count of Implemented Improvements?
- Number of Annualized Items per Person?

**Our priority:** Users interacting with the system and keeping their items up to date.

- Percentage of Users “Logged In”?
- Percentage of Users “Used System”? ★

*Used system = any activity that generates a timeline entry*



# Measure

# - Engagement Reports

KaiNexus  
Reporting Tool  
has a section for  
Engagement  
with 4 options:



## [User Engagement Summary](#)



Evaluate the health of your improvement culture by tracking the average number of Items submitted per person, as well as the percentage of people who have logged in and those who have used the system.



## [Engagement by Location](#)

Track user engagement on a per Location basis.



## [User Participation Summary](#)

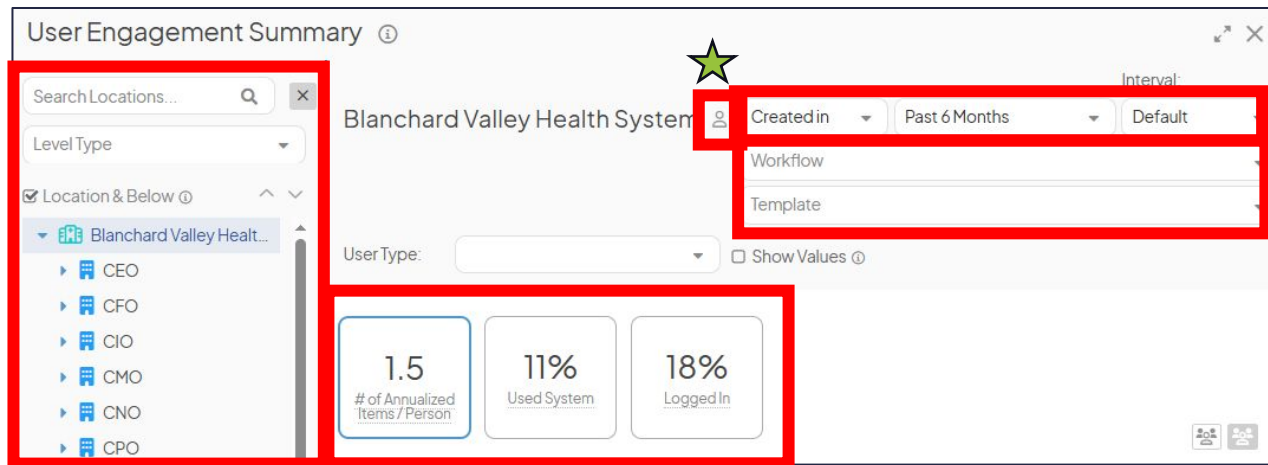
See how many people submit Items, assign them, and implement them in order to understand the distribution of improvement work in your organization.



## [Engagement by Persona](#)

Track how engaged each of your Personas are.

# Utilize Filters to drill down data:



- Location Hierarchy
- Number of annualized items per person
- Percentage Used System
- Percentage Logged In
- Date Created In, Started In, Due In, or Completed In
- Workflow or Template
- User Filter

Users: is any of ▼ All ▼

User Type: is any of ▼ All ▼

Location: is any of ▼ All ▼

Roles: is any of ▼ All ▼

Persona: is any of ▼ All ▼

Positions: is any of ▼ All ▼

Certifications: is any of ▼ All ▼

Hire Date: Starting ▼ Ending ▼

Created Date: Starting ▼ Ending ▼

First Login Date: Starting ▼ Ending ▼

Last Login Date: Starting ▼ Ending ▼

Last Updated Date: Starting ▼ Ending ▼

Team Role: is any of ▼ Role On Team ▼  
Min Max

Engagement: All ▼

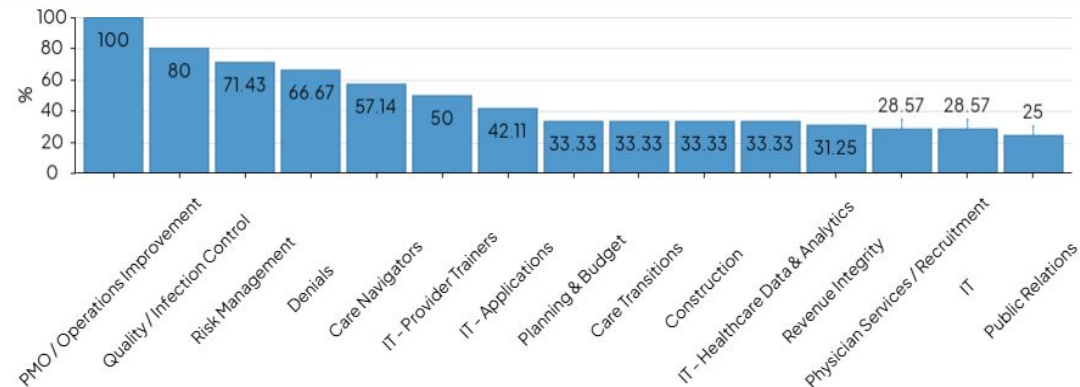
Viewed Board: ⓘ has viewed ▼ Any ▼

Additional: All ▼

# Data Deep Dive

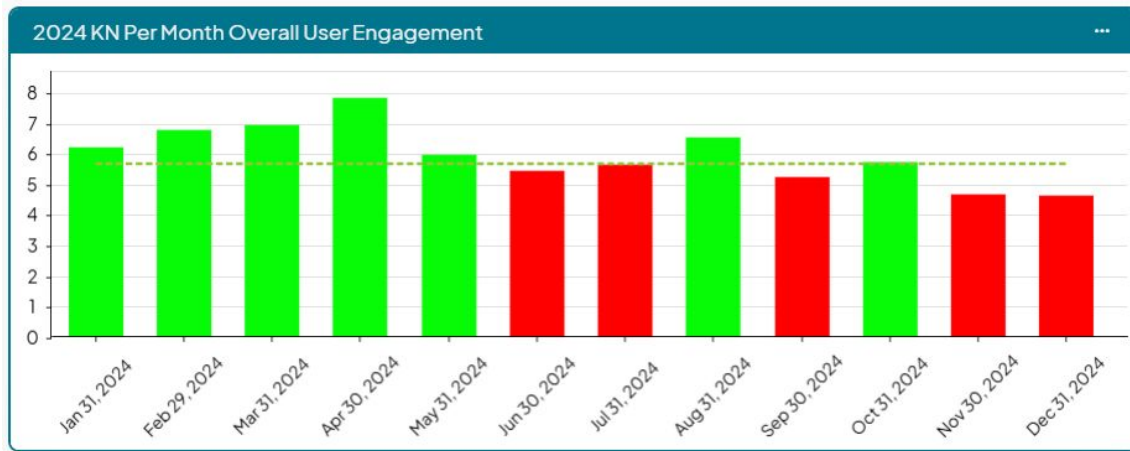
- You can drill-down the data by several different filters using the User Filter.
- You can export the report to Excel or PDF, or you can put it on a Board.

YTD Total Engagement by Location



# Reports do not include Goals or Formatting

Pull data from Report and enter into Threshold Chart



Cumulative  
vs  
Monthly  
Average

# People Goals – 2024 Enhancement

KaiNexus added People Goals, both People Count and People Percentage

Goal User Filter: ⓘ



Total User Filter: ⓘ



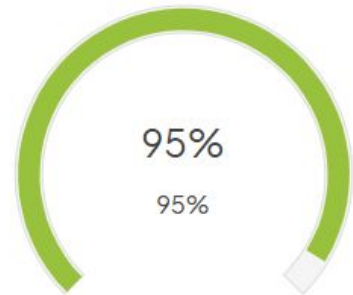
**Pro Tip:** People Percentage Goal values are calculated as follows:

**People Percentage Goal** value = (Goal User Filter count / Total User Filter count) x 100

These widgets are great for high level engagement visibility – but it's still missing trends / historical data.

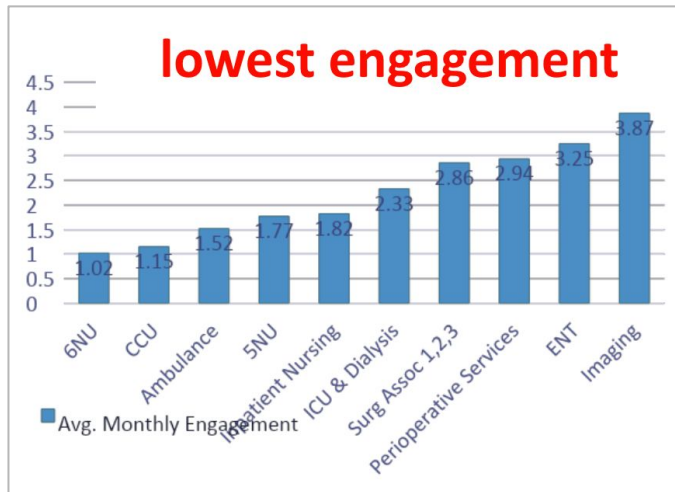
## Director Engagement

Directors - Used System in past 30 Days



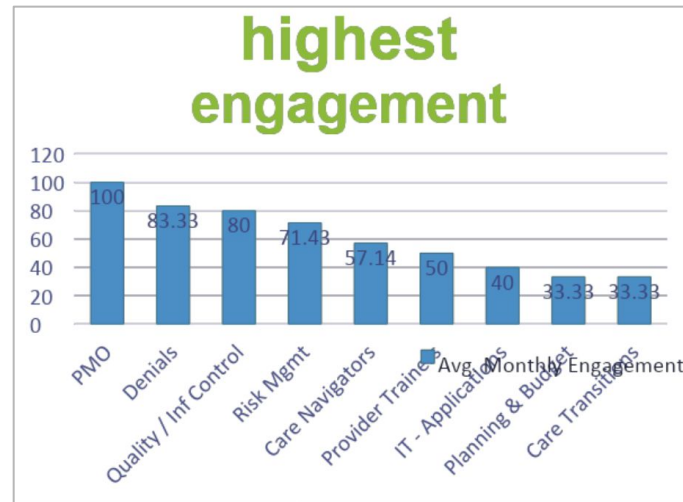
Goal: 100%  
User Goal: 37  
User Total: 39

# Analyze & Improve



Distinguish which **Locations** and/or **Roles** are **struggling** with engagement

- Offer **trainings** directly to specific locations, **ask their leaders** if there are any barriers you can help remove.
- Create **targeted educational documents** for areas of improvement

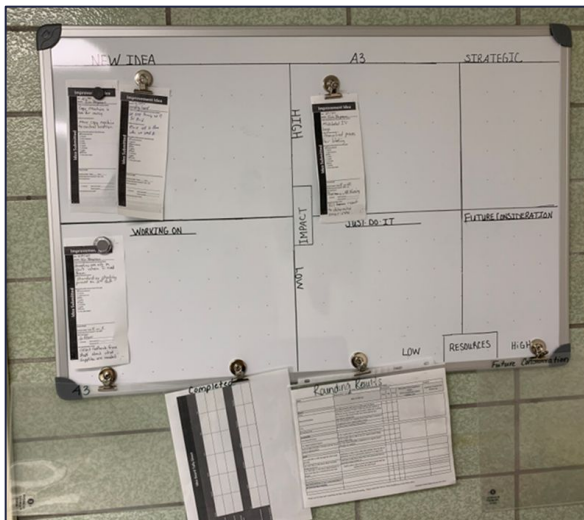


Provide **recognition** to teams that are utilizing KaiNexus **effectively**

- **Motivate** the **high-performing** teams with praise to keep up the good work
- Try **asking for suggestions** on expanding their good habits to the other teams, or get quotes on how utilizing KaiNexus has positively impacted their work

# Barrier: Clinical locations that don't utilize a computer as often.

We have physical idea tickets for our areas that can't access KaiNexus as easily.



Improvement Idea		Improvement Idea
Idea Submitted	<p>Improvement ideas are generally entered into KaiNexus. Only utilize this ticket if your area is still using physical idea boards.</p> <p>Date: _____</p> <p>Submitter: _____</p> <p>1. What is the problem/opportunity you are trying to address?</p> <p>2. What is the desired outcome?</p> <p>3. Additional information?</p>	<p>Define experiments (<i>things you are trying</i>), establish report back date &amp; update results:</p>
	Next Steps	<p>Resolution &amp; sustainment (<i>newly implemented changes &amp; results</i>)</p> <p>Date entered into KaiNexus: _____</p> <p>Does it count towards the Corporate Goal?</p> <p><input type="checkbox"/> YES <input type="checkbox"/> NO</p>
		<p>FRONT</p>
Idea Completed	<p>FRONT</p>	<p>BACK</p>

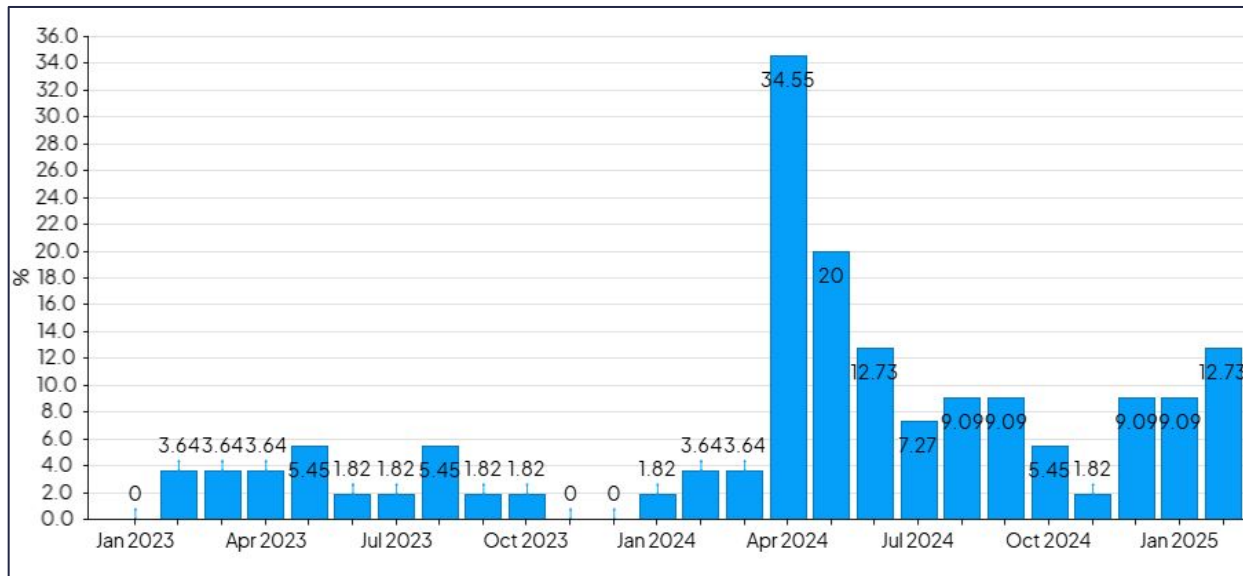


# Findlay Surgery Center

**March 2024:**  
Refresher trainings  
for manager &  
supervisor

**April 2024:**  
General training for  
all associates

Findlay Surgery Center Monthly "Used System"





# Monthly Average of associates that “Used System”

Year	ALL Associates (approx. 3400)	Team Members	Huddle Leaders	Department Leaders
2023	4.74%	1.26%	51.74%	75.59%
2024	5.99%	2.05%	59.95%	84.84%

How did we improve?

# Utilize KaiNexus for established workflows

## 2025 BVHS Strategic Plan on a Page - Cascading Goals

*Our Mission*  
Caring for a lifetime.

*Our Mission*  
Caring for a lifetime.

*Our Values*  
Integrity | Compassion | Skill | Collaboration | Innovation | Humor

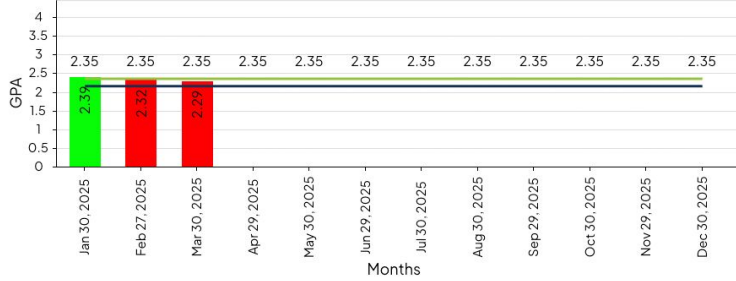
Pillar	Cascading Goal	ESC	Metric	2024 YTD Results (thru Oct.)	2025 Goal
Quality	Quality	Sandhir	Zero Patient Harm	3/5	5/5*
Quality	Service Excellence	Passtor	Patient Experience (Press Ganey)	2.23	2.35
People	Associate Engagement	Proctor	Associate Engagement (Gallup)	4.16	4.20
People	Ideas	Lewis	Completed Ideas	2,437	1,350
Finance	Finance	Cytlak	Contribution Margin	\$84.6M	\$111.6M

## 2025 Cascading Goals

+ Add

Actions

### BVHS Overall - Service Excellence Chart



☒ Current YTD Score ☒ This Year's Target: GPA ☒ Previous Year End Score: GPA ☒ Select All

### BVHS Overall Service Excellence...

Status	Title	This Period: Sig...
Active	2025 BVHS Overall Service Excellence Action Plan	
Active	8. Complete 2025 Press Ganey Contract renewal	
Active	2. Establish & maintain consistent communication with SE team	
Active	1. Establish 2025 SE Targets & maintain weekly/monthly scorecards	
Active	3. Increase personal knowledge of SE best practices	
Active	4. Establish BVHS service standards & hardware BVHS SE best	

### Service Excellence Resources

#### VP Board Quick Links:

- 2025 CEO - Service Excellence
- 2025 CFO - Service Excellence
- 2025 CIO - Service Excellence
- 2025 CMO - Service Excellence
- 2025 CNO - Service Excellence
- 2025 CPO - Service Excellence
- 2025 President BVMP - Service Excellence

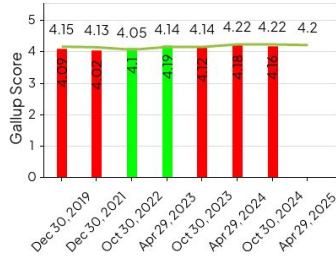
#### Other Links:

[Press Ganey Website](#)  
[How to Run your Cascading Goal SE Meeting](#)

Additional Service Excellence Scorecards on the S Drive  
 S:\Customer Experience\2025\SCORECARDS

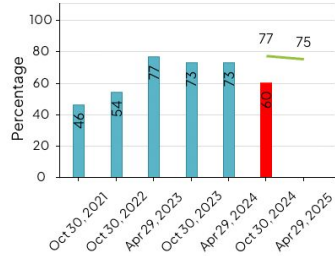
Note: this is not a hyperlink - please access this S Drive location manually

### BVHS Associate Engagement C...



☒ AE Score ☒ Associate Engagement: Goal

### BVHS Associate Engagement P...



☒ AE % Score ☒ Associate Engagement Percentage: Goal

### CEO Associate Engagement Plan

Status	Title	This Period: Sig...
New	2025 CEO Associate Engagement Plan	

### Associate Engagement Resources

#### VP Board Quick Links:

- 2025 CEO - Associate Engagement
- 2025 CFO - Associate Engagement
- 2025 CIO - Associate Engagement
- 2025 CMO - Associate Engagement
- 2025 CNO - Associate Engagement
- 2025 CPO Cascading Goal
- 2025 President BVMP Cascading Goals

#### Other Links:

[Press Ganey Website](#)  
 1. sign in  
 2. Top Left - click on the Menu  
 3. Select the Resource section  
 a. This will provide you with information from Gallup

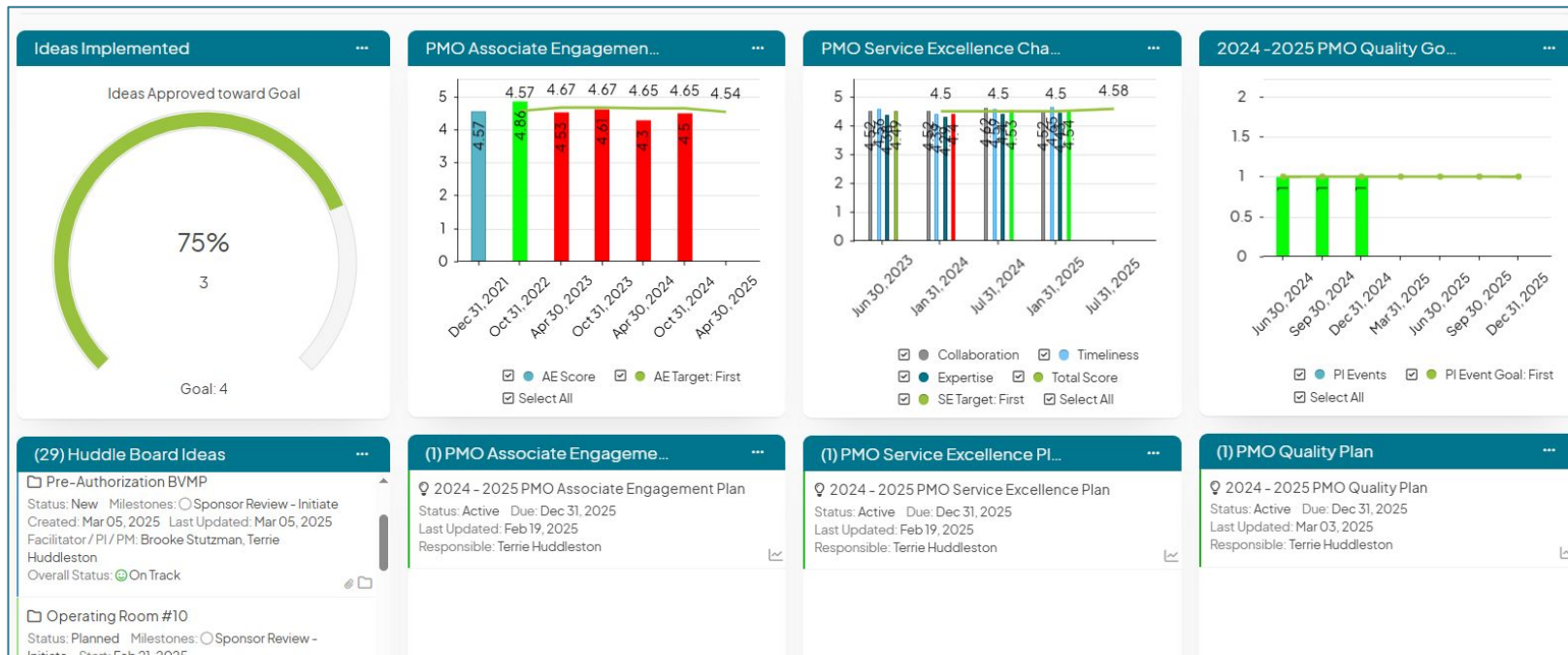
[How to run your Associate Engagement Meeting in KaiNexus](#)

[Survey Quest](#) [Help Menu](#)



# Managing for Daily Improvement

# Managing for Daily Improvement



# 2025 BVHS Strategic Plan on a Page

*Our Mission*

Caring for a lifetime.

*Our Vision*

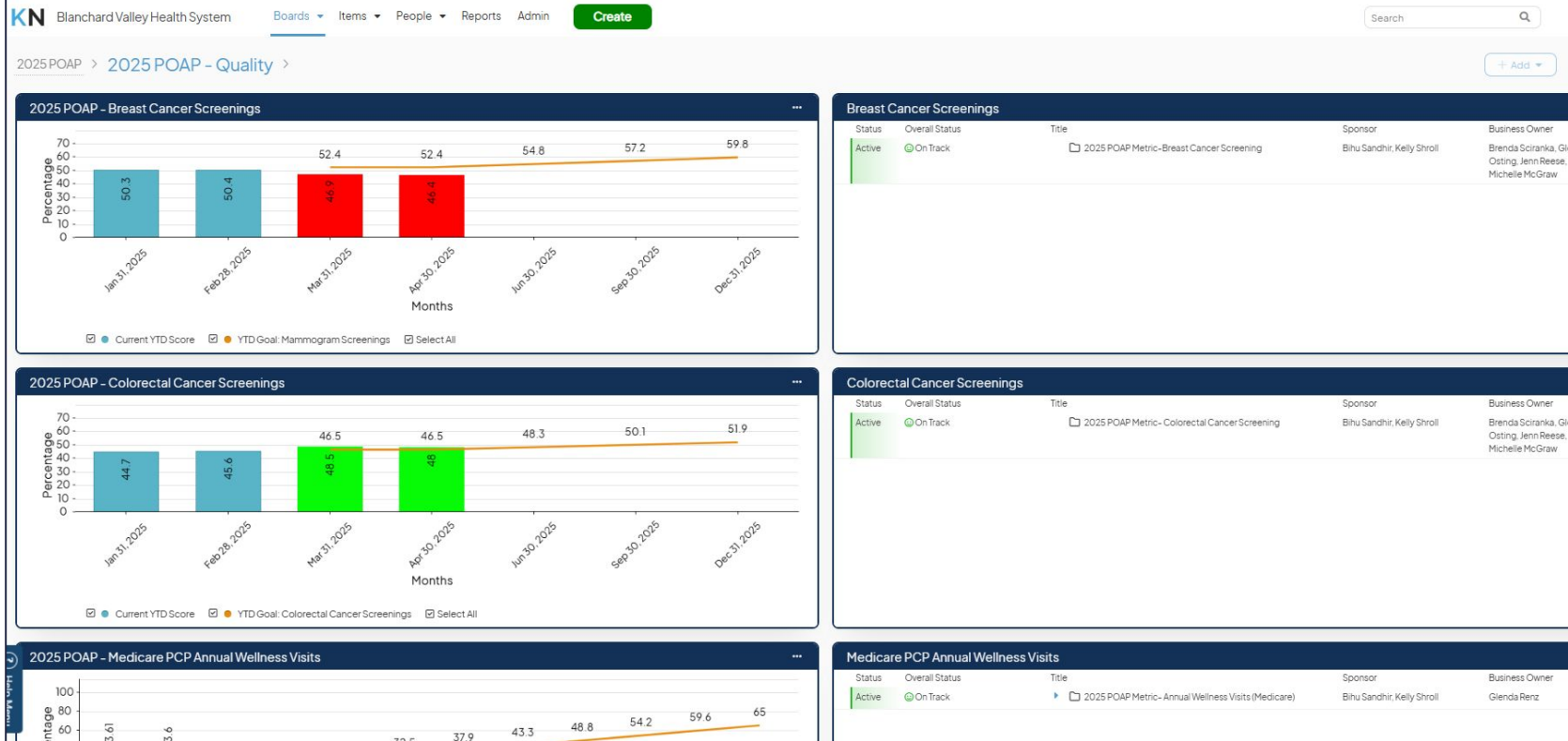
Extraordinary people. Exceptional care.

*Our Values*

Integrity. Compassion. Skill.

*Short-term goals*

Pillar	Key Strategic Objectives	BSC	Strategic Priorities	Projects	Project Owner (Responsible)	2025 Short Term Goal
<i>Quality</i>	<i>Be an environment of continuous improvement</i>	<b>Sandhir/Shroff</b>	Population Health (Preventative Health)	Breast Cancer Screening (All BVMP Practices)	Renz/Sciranka	59.8% (60th percentile)
				Colorectal Screening (All BVMP Practices)	Renz/Sciranka	51.9% (60th percentile)
				Annual Wellness	Renz	65.0%
			Population Health (Chronic Disease Management)	Controlling High Blood Pressure (All BVMP Practices)	Renz/Sciranka	71.1% (80th percentile)
				Diabetes Management Population 1 (PCP, WH, Plus+, Diabetes)	Renz/Sciranka	19.8% (90th percentile)
				Diabetes Management Population 2 (Speciality TIN + Neuro TIN)	Renz/Sciranka	29.1% (70th percentile)
		<b>Sandhir</b>	Transitions of Care/Length of Stay	Capacity Management	Moore	4.4 days
				Patient Status	Bishop	
				LOS	Bishop/Moore	
				Ambulatory Transition of Care Visits	Renz/Bishop	30.0%





## Key Updates

This Period: Significant Accomplishments, Communications completed since last report out.

**April Report Out:** On Track

a. 2025 Annual Target 51.9% (60th Percentile)

Q1 Goal 46.5%

b. Actual (February 2025) 48.0%

c. Please Explain

- Finalizing location and provider level scorecards in Power BI
  - Visuals reviewed by Amb. Quality Population Health Committee 4/9/25
- Preventative Health Task Force Initiation: Leads/core team members identified. Kick off 4/23/25; monthly cadence
- Health Maintenance Optimization Project:
  - Operational kick off meeting 4/23/25

**March Report Out:** On Track

a. 2025 Annual Target 51.9% (60th Percentile)

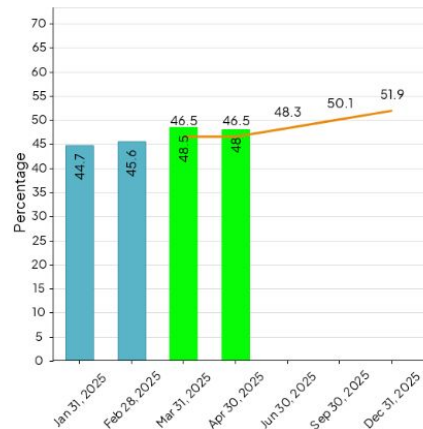
Q1 Goal 46.5%

Capacity

## (I) Project Metrics

1 2025 POAP - Colorectal Cancer Screenings

● Current YTD Score  
● YTD Goal: Colorectal Cancer Screenings



# Make recognition simple for Executives

♥ Give Recognition



My "To Do" Board - ESC > Give Recognition to My Division! (ESC)

Give Recognition to your Team!

Items below are Just Do It's and A3's that have been completed by your team. Enter a COMMENT below to acknowledge their accomplishments!

1) Typing the @ symbol, then their name, will notify them of the comment! 2) Check the email box to send the comment directly. ☐ Email Now

@Allisa Clowes Great job on this!

(5) Recently Completed Improvements by my Team

Template	Title	Key People	Completed Da...	Last Comment
Just Do It	📌 Applications list	Responsible: Katie Cholodewitsch	Apr 03, 2025	Applications will b support and getti - Katie Cholodew
Just Do It	📌 Denials Tool	Responsible: Cory Maag	Feb 11, 2025	

# Other Engagement Initiatives

## KaiNexus Statuses

### Draft

When you initiate the creation of an item but haven't submitted it, it's in Draft Status. Drafted items are only visible to the authors of the item.

### New

This status indicates an item has been recently submitted and decided whether to work on the item or close it. Don't let it go long!

### Planned

This status indicates the team intends to work on an item actively working on it. You may or may not enter an anticipated plan.

### Active

These items are actively being worked on. They have a due date and are responsible for them.

### Overdue

These items are past their due date.

### Resolution Submitted

The work has been completed on these items, but we are waiting for approval. This is usually used for our Operation Sunshine projects.

### Complete

All work has been closed, either because the project has been completed or decided not to work on it.

### Deferred

The team has no current plan to work on it but may want to review it regularly to decide if we can implement it.

## KaiNexus Assistance Offered in Multiple Ways

Do you need KaiNexus help? There are several ways the project manager can assist and provide guidance to all KaiNexus users.

First, visit the "Help for KaiNexus" board at <https://bvhealthsystem.kainexus.com/link/b/22283>. Here, you can sign up for "Refresher Sessions," held on the first Tuesday of every month. Then, join a PMO coordinator, via Teams and ask questions, request topics to be reviewed, or get examples to work through together.

You can also sign up for formal training via Net Learning. Look for classes like "KaiNexus Idea Board Training," which are held in person at Riverside. All users are welcome to participate in these classes. Be sure to check with your leader to ensure proper coverage before attending.

If you need to schedule training for your team or a one-on-one training session, or if you have additional questions, contact Alissa Clowes at [aclowes@bvhealthsystem.org](mailto:aclowes@bvhealthsystem.org) to inquire.

## KaiNexus Training

### Monthly Refresher Sessions

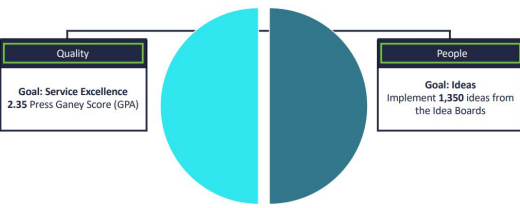


Regular training sessions will be held the first Tuesday of every month

Sign up for training [here!](#)

Have a quick question? Reach out to [Alissa Stansbery](mailto:astansbery@bvhealthsystem.org) at [astansbery@bvhealthsystem.org](mailto:astansbery@bvhealthsystem.org)

## 2025 Bonus Program\*



## Idea Board Success Story

January 2025

For the month of January, we are focusing on our Technology Pillar and an idea submitted by Jamie Thompson, oncology data program administrator at The Arnes Family Cancer Care Center. Jamie works to capture health data on all cancer diagnoses occurring in BVHS, both in and out-migration. She and her teammate, Stacy Watkins, provide BVHS with important cancer delivery metrics based on information they gather and submit to the state and federal databases.



Jamie had the idea to customize a Tumor Registry page in Cerner to increase efficiency in finding data when abstracting a cancer case. Her leader, Adele Simon, connected her with Alicia Beck, a system analyst, for IT support. Jamie and Alicia collaborated to identify the documentation needed and created and tested the best workflow. The page went live a little over a month ago and was compared against the previous data collection method. The results showed an estimated 30% decrease in time to abstract cases if all care was received at BVHS (or all data was available in Cerner).

This idea goes to show that submitting changes based on seemingly small things can lead to big results! Shown in the accompanying photo are Alicia Beck and Jamie Thompson.

Like (1) | Comment (0)

## Five Things BVHS Loves About KaiNexus



### KaiNexus Supports Our Continuous Improvement Mission

BVHS and KaiNexus share a similar mindset of prioritizing continuous improvement. KaiNexus is our software tool that helps us manage all of our continuous improvement ideas and project work.



### KaiNexus Gives Our Associates a Voice

KaiNexus allows for all associates to submit their ideas, no matter how small the change may seem. Submitting changes based on seemingly small items can lead to big results!



### KaiNexus Helps Us Reach Our Goals

Thanks to everyone's Idea Board submissions, we were able to surpass our 2024 goal of 2,700 ideas by completing 2,815 ideas!



### KaiNexus Highlights Our Project Work

KaiNexus allows us to track all of our project work in one place and create visuals to be transparent with how we are progressing towards our Cascading Goals and strategic priorities.



### KaiNexus Listens to Our Feedback

BVHS and KaiNexus meet weekly to discuss questions, share feedback, and learn about new enhancements. They listen to our feedback and use it to help shape the future of KaiNexus.

If you have any questions or feedback to share, please email Alissa Stansbery at [astansbery@bvhealthsystem.org](mailto:astansbery@bvhealthsystem.org).



# Why do we care about Engagement?

## Gallup's Employee Engagement Survey: Ask the Right Questions With the Q<sup>12</sup>® Survey

**25%**

Only 25% of U.S. employees strongly agree that their organization cares about their overall wellbeing.

In fact, employees who strongly agree that their employer cares about their overall wellbeing, compared with other employees, are:

**69%**

less likely to actively search for a new job

**71%**

less likely to report experiencing a lot of burnout

**36%**

more likely to be thriving in their overall lives

**3x**

more likely to be engaged at work

**5x**

more likely to strongly advocate for their company as a place to work and to strongly agree they trust the leadership of their organization

**Q07**

**At work, my opinions seem to count.**

*Hear Me:* Employees want to feel valued. They want to know that their input is important and that they are making a significant contribution and a difference to the environment in which they work.



2022 2023 2024  
3.8 3.81 3.85

# Summary

- It's important to determine what your success looks like and how you're going to measure it.
- Engaged associates are more productive and have lower turnover. Utilize KaiNexus to help associates feel like their opinion matters at work.
- Investigate the Report section of KaiNexus – there is much more!
- KaiNexus is continuously improving, ask your CSMs to log your enhancements!

# One of our values is humor...

Some of our *current* wish list includes...

- Thresholds/goals within Reports
- Solution for items that need more than one parent
- Solution to pull table view from card to within A3
- Reports around engagement frequency
- Ability to edit Anticipated Start Dates
- Rounding for financials (no cents)
- Automatic template conversion based on attribute answers
- Report Summary Emails to include engagement metrics
- Stacked cards expanding selected card instead of first card in stack
- Stacked cards staying on selected card when editing instead of refreshing to first card in stack.
- Copying a board/stack/card should not make a draft copy of every chart that's on the board/stack/card
- Ability to sort/organize/archive goals

**We love & appreciate you Megan** 😊