

Cultivating Trust: Key Approaches for Risk Management Professionals

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Panel

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We have no real or perceived conflicts of interest that relate to this presentation.

Objectives

- Review the key components of building a trusting relationship
- Review various challenging situations and strategies that may promote trust
- Invite all to share their experience in building trust
- Provide take-aways to build trust
- Discuss the importance of Resilience and resources available

You are the Face of the Organization

What should YOUR face look like?

How do you build trust with the customer?

Who are your customers?

Probably Not



How do we do this?



Building Trust Starts with You

Remember, it is not about you

You are there to Listen

Show Compassion

Be Inclusive

Above all else, have Integrity

Building Trust Starts With You

Dispel your bias before you engage

- To do so you need to recognize your own tendencies (talkative, emotional, aggressive, passive aggressive, interruptive, complacent)

Find your poker face

- Your face matters
- Use nonverbals (sit down with the person, nod, show expressive concern)

Building Trust Starts With You

Listen

- Encourage talking by actively listening

Make the connection

- Recognize they want to be heard
- Express empathy – blameless apology
- Be honest, *I don't know* is OK
- Use redirection and affirmation to control the conversation

Building Trust



Building Trust- Nuts and Bolts

Prepare

- Prepare for the conversation—what info will you need i.e., facts, financials, data from previous conversations

Assume

- Assume you are being recorded—have someone with you as a witness—especially with high-risk situations

Take

- Take notes during your conversation—ask for permission first/reference the need to take notes

Limit

- Limit distractions—no cell phones/watches beeping, etc.

Document

- Document the conversation

Follow

- Follow-up



Building Trust- Relationship Traps

Avoid Tunnel Vision (focusing on our agenda instead of listening)

No Blame Game

Do not Speculate  Verify

Do not Make Excuses

Keep it Simple (everything does not require a response; yes, no, IDK are complete sentences)

Beware of the Justified Person

Example: The Justified Person

- Complex
- Emotional for all
- Consider ripple effect for both sides
- Focus on **Trust** and accepting that what you can do, may not be enough



Example: The Unrealistic Person



- Grieving can shine a spotlight on a situation
- "I want to know what you did to X or are doing about Y?"
- Can you pay everything from now until forever?
- I need an answer tomorrow

Example: The Angry Person



Example: The Angry Person



Appreciate the fact that often the patient's anger isn't about you, but rather is being directed at you



Use a non-judgmental approach



Separate the person from their behavior



Be confident



Meet the person where they are to establish rapport

Building Trust- Heat or Heart Communication Model

H-Hear them Out

- Let the person vent for a little bit
- Listening may diffuse their frustration or anger

E-Empathy

- Understand the situation from the customer's perspective

A- Acknowledge

- Voice your support
- Blameless apology - "I'm sorry you had that experience."
- "That sounds rough. Please let me help you by looking into this matter."

R-Resolve

- Determine customer's want(s) for resolution
- "I cannot promise anything at this point. However, I want to know what will make this situation better for you."
- "What are you looking for that will make this better?"
- Understand the customer may need time to consider

T-Thank Them

- Assure the customer that these matters are important and you appreciate the customer sharing a difficult situation.

Reflection



- Every interaction leaves us with a nugget or tidbit we may use in the future
- What worked, what didn't?
- How do you feel?

Building Trust Take-Aways



A testimonial about continued Trust



Remember Resilience

- Internal Business resources EAP, etc
- Peer Support Group
- Community Networks
- General Resources
- Walk in nature
- Volunteer
- Read a book
- Play with a pet
- People connections

Questions?



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