****Rounding Documentation Form

**Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** **Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Department Visiting:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Introduce yourself to three or four individual staff members on the unit/department. You can speak with each staff member individually, or with a group of staff all at once. Briefly describe your role and explain that you are visiting the unit/department to see how your team can better serve them. Ask the staff if you could discuss a few questions about your department’s service. If the staff agrees, ask the following questions and jot your notes in the space below.*

1. What is your role in this unit/department?
2. Do you have any questions about how my team serves you, or how my team fits into the bigger picture?
3. I want to make sure that my team keeps doing the things that are best serving you. What should we make sure we keep doing?
4. How about what we aren’t doing so well—how can we better serve you?
5. Is there anything else that we haven’t talked about that you think my team and I should be aware of?

Source: HR Advancement Center, *Hardwiring Accountability*

*at the Front Line,* Washington, DC: Advisory Board, 2012.

**** Post-Rounding Reflection Form

*After rounding, use the space below to reflect on what you learned from the time you spent on this department/unit.*

1. What was your general sense of this customer? Did they understand who we are and how we serve them? Overall, how satisfied or dissatisfied are they with our service?
2. What should our team keep doing to serve this customer?
3. What should we change about how we serve this customer?
4. Do you have any other recommendations related to our service to this customer?

If so, please list them below:

1. What should our next action steps be?
2. Do you have any questions or concerns? If so, please list them below.

Source: HR Advancement Center, *Hardwiring Accountability*

*at the Front Line,* Washington, DC: Advisory Board, 2012.