

## Marketing Savvy: Exceeding Expectations in a Dual-Customer Service Setting

*As published in Occupational Health Tracker, Spring 2004*

by Catherine Baumgardner, MHA, FACHE

Occupational health programs have the unique opportunity—and challenge—of serving two sets of customers: the patients and the employers. Each views the services provided from very different perspectives.

From the patient's standpoint, occupational health is often seen as the adversary. The department is not the patient's family physician and may only encounter the patient once, usually as the result of a workplace injury or as part of a screening or accident prevention program. Therefore, the opportunity to form a long-term, mutually respectful patient/physician relationship is missing. Consequently, employees view occupational health as the "company doctor" who has the employer's best interests in mind, not theirs.

On the other hand, employers expect the occupational health facility to be their advocate—the one department they can count on to manage medical costs, reduce lost work time, prevent inappropriate lost work time, and improve the overall health of their workforce. To the employer, the occupational health department is a key partner in keeping workers productive and the company profitable.

These differing perspectives can create a dynamic of tension that often complicates the customer relationship. Your challenge is to serve each and every customer in a way that manages the balance among patient/employee, company health officer, and state regulations, never losing focus of what is right for each one.

### Asking the Tough Questions

How do you respond to these conflicting customer expectations? Start by asking some key questions.

Your answers—though sometimes tough to acknowledge—set the stage for implementing a customer-focused service effort in your unique environment. ~ Have we clearly identified our customers? ~ How well do we know them and understand their needs?

- Do we understand the delicate balance that exists among the employer, the patient, and us?
- How does the way that we do business reflect our understanding of that balance?
- How are we measuring customer satisfaction?
- What issues have been identified?
- What issues have been addressed, and how?
- How do we communicate the changes we've made? ~ Have we clearly identified and communicated the role that we play to our customers?
- Do we have processes in place for delivering and managing customer expectations?

### The Heart of the Matter: Goal-setting and Leadership

Answering these questions will have little impact if you and your leadership—including physicians, departmental, and senior administrators—aren't completely committed to making a difference. The

role of your leaders is to help define and support this effort and, more importantly, to get involved in asking questions and hearing the answers.

Commitment from leadership is vital to creating and nurturing the right environment. For example, if your clients want a more customized billing process, yet your hospital finance department doesn't see how their inpatient system can do that, it's up to leadership to insist on finding another way. After all, having to tell the client that their request can't be met won't keep them as your client for long.

Once leaders support your efforts you'll find that organization-wide changes are easier to accomplish and it will be easier to focus on the larger goal of customer satisfaction instead of doing what's best for each department. The bottom line: your leaders establish the vision, the common point on the horizon toward which everyone in the department aspires. Subsequently, delivering top-notch customer service is not an accident. It's the result of a carefully orchestrated and well-executed plan.

### **Determine Your Purpose**

What is your commitment to your customers? Is it your desire to "provide the best occupational health services to those we serve?" Is your desire to be "the service of choice for area employers?" Is your desire to "maximize revenue to your health system?"

There are no right or wrong answers. In all likelihood, it's a combination of these concepts, and then some. Whatever you choose, make certain that your purpose is something that reflects the needs of your customers, and inspires your staff!

### **Design Your Program**

Think about what your customers have told you. (If you haven't solicited feedback from your customers, this is the time to develop a mechanism to do so.) Remember that it helps to consider customer comments in the following context:

- The kind that apply to *process*—the operating guides that people use in performing services.
- The kind that apply to *people*—those who carry out your processes.
- The kind that apply to the *setting*—the environment, both physical and emotional, in which staff and customers interact.

While these functions may sound separate, providing excellent customer service in a world of conflicting needs demands a delicate balance using all three aspects.

### **Educate, Train, and Communicate (and then do it again!)**

How many times have you changed a process, only to hear that "the new process won't work" or "I never knew about it"? If that's the case, several things may have happened: your customers haven't given their feedback on a process change, there's been a failure, or there hasn't been sufficient (or any) training in the new process. Or perhaps your staff doesn't understand their accountability for the changed process.

How many times have you changed a process, only to hear that "the new process won't work" or "I never knew about it"? If that's the case, several things may have happened: your customers haven't given their feedback on a process change, there's been a failure, or there hasn't been sufficient (or any) training in the new process. Or perhaps your staff doesn't understand their accountability for the changed process.

Also remember that changes need to be communicated in a number of different ways. Everyone "gets it" in a different way. It's always better to over-communicate than to under-communicate. Remember that you need to make the change actionable and accountable. Each person involved in the process needs ownership and acknowledgement of their responsibility for implementation.

# GOALS

Armed with background information on customer-focused services, determine your goals:

- What kind of environment do you want to create?
- How will it look and feel?
- What is our commitment to the patient?
- What is our commitment to the company?

## **If It Moves, Measure It, and Talk About It**

If you don't measure it, you can't improve it. If you don't measure it, you have no idea where you started or whether you've changed anything! Start by measuring how well you are doing against the goals set for your program. What has changed? Is your market share growing?

Measure this progress regularly. Compare notes with others, both in and out of the industry. Communicate the results of your measurement. Integrate the results of your efforts into your customer newsletters, post them for employees to see, report changes so that your customers and staff see that their input really made a difference. When they see a visible outcome and how they have made a difference, your support will only increase.

## **The Essence**

Establishing a customer-focused service plan is no different from establishing a patient treatment plan. It's important to set the goals, align the processes, bring in the right people, educate and train, measure outcomes, and celebrate a successful outcome. Too often we try to overcomplicate a simple process. If you approach service with the same commitment that you apply to patient care, you can't help but be successful.

In the world of occupational health, these principles carry additional emphasis due to the perceived imbalance in patient relationship. It's up to you to recognize these perceptions and to be proactive in addressing them. Your company clients and your patients will thank you for it.



Catherine Baumgardner, BSBA, MHA, FACHE, Consultant, Corporate Health Group,  
[www.corporatehealthgroup.com](http://www.corporatehealthgroup.com), 1-888-334-2500