

## Revitalizing Service: Shopping for Marketplace Perceptions

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Could this ever happen in your organization?

A young family has just relocated to your city. The mother calls your emergency department to find a physician for her daughter who's not feeling well. The staff says they can't help her unless she brings the child in.

Or, how about this situation?

The mother calls one of your owned clinics and the receptionist says, "We don't have any openings this week. Dr. Smith's first available appointment is next Friday."

How about this one?

A woman needs to bring her elderly mother into your hospital for a mammogram next week. While at the hospital visiting a friend, the woman goes to Radiology to see where she'll need to take her mother for the mammography—but the registration desk is closed. She sees people in the area, so she waits, certain that someone will help. The "people in the back" see her, but appear busy with their work so, after about 10 minutes, she leaves.

Could these situations (or some far worse) happen at your organization?

You'd like to think they couldn't. You may say, "Our employees have been taught the value of helping and offering information. We all understand how important it is to get new patients into our referral program or to make sure everyone feels welcome. But are they really meeting the basic needs of your customers—whether they're the newcomer, physician, patient or guest?"

Many healthcare organizations have addressed the issue of being service oriented, or have included the issue in their strategic plans. However, discrepancies often exist because we define service *conceptually*. Moreover, each staff member may interpret service very differently—and often we assume everyone is doing an acceptable job of delivering on the service promise.

Let it be said that no one makes a conscious decision not to meet the customer's and your organization's service expectations. But often it's the little things that make a difference.

## **Mystery Shopping: Taking a Look from the Outside**

Many organizations evaluate their service performance by doing some mystery shopping. The concept takes an “outsider” and asks them to—via telephone, onsite visits and the patient experience—evaluate the implementation of the organization’s service standards. By using a trained shopper, your organization can detail how the staff responds to the customer. Do they meet the basic expectations, exceed those expectations, or fail?

Mystery shopping has been used in the retail world for decades. Professional shoppers patronize stores to purchase clothing, make-up and other products. At each destination, the shopper evaluates how each store and their clerks perform. The criteria include:

- Promptness
- Courtesy
- A personalized approach
- The ability to offer advice and/or alternatives and closure
- The ability to conclude the interaction and assure the customer’s needs are met

## **Applying Mystery Shopping to Healthcare Services**

If your hospital and/or clinics are strategically focused on enhancing service (and what organization isn’t these days?), mystery shopping is an excellent way to objectively review several areas. You can:

1. Look at current performance.
2. Set the stage for service-enhancement opportunities.
3. Evaluate the effectiveness of a new service program.

The information you’ll receive is powerful—and very real. Sometimes we need the honesty of the human element, and its stories and emotions, to fuel our initiatives. Applied in combination with other service evaluation strategies, including retention, satisfaction studies and documentation of internal complaints, your organization gains direction and the motivation to enhance your service delivery.

## **Is Mystery Shopping Right for You?**

There are many ways to evaluate customer service, and mystery shopping is but one of them. So, how do you know if this approach is right for your organization? If customer service has been at the center of your discussions, here are some “internal tests” you can employ to see how you are doing:

- Evaluate the level of internal apathy (or empathy) toward enhanced customer service.
- Spend a week looking around and observing people working in service roles. That includes the cafeteria, lobbies, information desk, clinical areas, waiting rooms and Admitting.
- Evaluate the level and type of improvement from the current satisfaction tools.

- Consider a focus group of patients and/or family members. Ask questions that help you understand whether service (not clinical quality) was adequate or above expectations.

If your organization is succeeding in all of these areas, a shopper will certainly deliver a stellar report. But realistically, you'll find deficiencies in one of these areas. That's the point where your organization's leaderships needs to ask for each department's support in enhancing the service capabilities. At this stage, the mystery shopper's findings can also be valuable in positioning specific needs—and turning them into positive outcomes.

### **The Impact on Your Organization**

When communicated effectively, mystery-shopping outcomes have a profound effect on the people who are responsible for the service areas.

Picture yourself as a manager responsible for building the practice in a new hospital-owned clinic. The mystery shopping report states, "Calls were placed to the clinic three times and there was no answer within 6 rings," or "The receptionist could not supply any background or details about the physician when asked by the caller."

Suddenly, you have the attention of the individuals directly accountable for making service delivery happen. The real-life perceptions, and the power of the personal interaction, are hard to brush under the rug. Somehow the retaliatory, "But we do well 'x' percentage of the time," seems weak.

Maybe it's time to add emotion back into the equation—and the starting point may be to get the attention of the internal team by showing them an objective view of their performance. You can take the service discussion back to a basic level and remind yourself and your team that good service is more than just a statistical validation. It's about meeting the needs of *every* customer, *every* time.



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