

# PERCEPTION STRATEGIES

## **Mystery shopping captures missed opportunities**

- In the waiting area of Parkview health System in Fort Wayne, IN, a woman put a dollar into the vending machine; but no candy bar emerged. The information desk directed her to the manager of food services. She trekked over to his department, only to be told that he wasn't in.
- Across the country, at Sharp Chula Vista Medical Center in San Diego, an anesthesiologist was explaining, through a bilingual nurse, what he would be doing to a patient during her procedure. "Just tell her that's the way it's going to be," he said, not making eye contact with the patient.
- At still another hospital, waits for affiliated physicians were so long that staff would direct callers to use the Yellow Pages to find another doctor instead of referring patients to the hospital's own urgent care center.

In these cases, the customers involved were actually mystery shoppers sent by outside organizations to determine the quality of service at a particular hospital. Although mystery shopping is not widely utilized because of the complexity involved, hospitals that have incorporated it into their customer service initiatives report good results. Mystery shopping can identify communication and behavioral missteps by staff, missed opportunities to refer people to other hospital services, lack of consideration by over worked caregivers, even off-putting conditions like dirty restrooms or waiting areas. These are the types of specific dissatisfiers, such as shopping proponents, that traditional patient satisfaction surveys seldom reveal.

"It's an observational tool that closely focuses in on how your staff are dealing one-on-one with customers," says Kevin Billingsley, president of Perception Strategies, Inc. in Indianapolis, which specializes in healthcare mystery shopping. With patient surveys, "there's no way to find out how someone actually behaved, how employees interacted with the customer," he adds. Mystery shopping "fills that gap" by being very specific.

Barbara Gerber, president of Devon Hill Associates in La Jolla, CA, offers mystery shopping along with marketing and sales training. With shopping, hospitals call on her for two reasons: Patient satisfaction results are slipping and they need to pinpoint the

cause, or they've instituted a new quality assessment program and want to raise the bar of service. "It's a way to provide very constructive criticism about what a hospital is doing well and not doing well," she says. "We're looking for barriers to good service."

## **Beyond Standard Surveys**

Mystery shopping is controversial. Many hospitals won't use it because of concerns that it's "spying" on employees or taking away time from real patients. In addition, it's time consuming and costly, especially if a hospital uses an outside agency. Gerber, who has mystery shopped about a dozen hospitals, concedes that hospital cultures may be resistant to it, "those that do it are amazed at the information they get."

Parkview Health System, a four-hospital system servicing northeast Indiana, has been using mystery shopping for about a year as part of an overall customer service initiative. "This is a huge priority with us," says Jim Tobalski, senior vice president of community relations; especially since Dr. Frank Byrne became president of Parkview Hospital about four years ago.

But three years into the initiative, Parkview hit the limits of standard patient surveys. "Patients aren't necessarily evaluating the staff on key aspects of customer service," says Tobalski, including activities like answering the phone, giving directions, or explaining tests and procedures.

Parkview had put standards in place for interacting with customers, directing staff to smile, make eye contact, be accessible, and the like. Looking for new ways to get richer customer feedback, Parkview contracted with Billingsley to put a shopping program in place. In turn, the consultant recruited actors from local theater groups, who would visit or call Parkview's hospitals and outpatient clinics seeking various customer services, and report the results.

"The mystery shoppers go to the majority of our facilities across three different counties," says Tobalski. And they visit not only patient care areas but also departments like maintenance to see, for example, how difficult it is to get someone to fix a light bulb or a vending machine. Departments get "errant phone calls" from people who need to be directed to the correct place.

Parkview does set limits on mystery shopping. "No one gets a service that isn't ordered by a physician," Tobalski says, such as an x-ray or blood test. The actors who do need healthcare services are encouraged to use Parkview facilities. In addition, "I try not to take too much of any staff person's time," he adds.

As a result of the program, Parkview has made changes in procedures. "We found that we were lousy in transferring callers appropriately," says Tobalski. "People were still being dumped on other departments. "Now, when a caller comes in to the wrong department, it is the responsibility of whoever answers the phone to take the person's name and phone number and guarantee to personally call back with the right contact.

Tobalski himself got a call from someone looking for a lupus support group. Although Parkview doesn't have one, he located the nearest one and got back to the caller with that information. As for the person who lost a dollar in the vending machine, the staff person should have just given her back the dollar and "trusted a supervisor to pay it back," he says.

## **The direct marketing angle**

Another problem the technique revealed was that staff members weren't referring people to the Parkview Web site for information. One shopper wanted information on fertility services, only to be told there was no printed information available. Yet, Tobalski says, the Parkview Web site contains links to sites with fertility services. "We have this wealth of information that the staff isn't aware of," he says. Parkview has asked its staff to become familiar with the site and access it to give information to any caller who doesn't have a computer.

Mystery shopping can also pinpoint whether staff is effectively marketing a hospital's services and programs. "If someone is looking for a particular specialist or service, 'do our staff members know enough to direct the person to our services?'" Tobalski asks. For instance, the hospital provides emergency consent forms for parents to give to child-sitters. "The forms are on our Web site and also in print in all our lobbies."

Tobalski credits mystery shopping, along with other customer service efforts, for improving patient satisfaction scores. "(It's just one tool we use with other tools," he says. "But as long as it's valuable to managers we will continue to do it."

Comanche County Memorial Hospital, a 283-bed regional referral center in Laughton, OK, has used the technique to look at outpatient and ancillary services and its emergency room. "We wanted to get an objective viewpoint of what our patients were seeing," says CEO Randy Segler. Comanche also turned to an outsider to do the shopping, in its case Gerber. She cited problems such as delays in communicating test results, as well as lack of reading material in waiting rooms and poor lighting in the parking lot. As a result, Segler says Comanche has beefed up communications between the nursing staff and patients. In the emergency room, it created an expanded guest relations coordinator whose sole duty is to interact with patients. Gerber also found that Comanche's urgent care clinic was overburdened, since both occupational health and walk-in care were provided in one location. The hospital has since split up the two into separate locations. Segler intends to continue doing mystery shopping periodically. "It helps you verify what you've heard anecdotally," he says.

## **Targeting managed care**

In Southern California, on other most competitive markets in the country, "we were tired of hearing all the complaints about managed care," recalls Britt Berrett, CEO of Sharp Chula Vista Medical Center, a 306-bed hospital eight miles from the Mexican border.

Several years ago, when he took over as CEO, Sharp Chula Vista decided to “use every resource available” to make patient care the center of its mission.

The initiative included mystery shopping by Gerber. “That gave us a real-life experience of what it was like to be our patient,” says Berrett. A year and a half ago, the consulting team “put together an evaluation process over two to three months, and then shared the results.” Among the findings: Outpatient surgery had grown too quickly and wasn’t patient friendly, and there was a need for more bilingual staff as well as greater sensitivity to Hispanic patients. Sharp Chula Vista responded by doubling the size of outpatient surgery, moving pre-op to a separate area, and beefing up staff. It also introduced multicultural staff training through a grant from a local community center and started requiring that all its PBX operators be fluent in English and Spanish.

Berrett says he intends to do another shopping round, even though the process “is time-consuming to coordinate, and can be very intimidating.” He’s pleased with the results. Sharp Chula Vista’s patient satisfaction scores have moved steadily upward and are among the top tier in the entire Sharp system.

### **Do-it-yourself at Baptist**

Although most hospitals that do mystery shopping use outsiders, 620-bed Baptist Hospital in Pensacola, FL, has instituted its own internal program using staff volunteers. In 1996, Baptist set a goal of being in the top 1% of all hospitals in the country as measured by national Press, Ganey rankings. It embarked on a customer service initiative to achieve that, establishing seven multidisciplinary teams to look at various aspects of service. The teams devoted to inpatient and outpatient satisfaction decided to do mystery shopping, says Gail Boylan, vice president of patient care services. “They did it all themselves with very little direction,” although the physician or nurse leader in the department to be examined would know about it.

The employee shoppers went to the departments they were not familiar with and simply sat and observed. For example, a housekeeper spent several hours in the admitting waiting room and came out with comments such as lack of eye contact and smiles by various staff, missing slipcovers on chairs, and torn wallpaper. A security guard who went to the ER found that waiting lists were erratic and patients weren’t always informed when their turn came.

Boylan says mystery shopping continues to be used whenever satisfaction scores dip. “We even have a SWAT team,” he says, that will go in with several shoppers whenever there’s a particular problem in an area of the hospital.

As a result of the mystery shopping and overall patient satisfaction effort, Baptist has upgraded its behavior standards and “scripted” many interactions with patients. In one example, the incoming nurse at every change of shift tells the patient her name and how long she will be on duty, and asks what she can do for the patient. The Baptist Standards

of Performance booklet covers everything from elevator etiquette to the maximum number of times a call light may ring before it's acknowledged (five).

Baptist even goes so far as to post negative and positive comments by patients and secret shoppers in the staff lounges, with miscreants who were rude or otherwise violated standards identified by name. "The staff asked for that," says Boylan. "There's nothing like peer pressure." However, to overcome some resistance to the shopping, Boylan has instructed the employee teams to come back with positive feedback as well. "We didn't want to make it all negative. We want to tell them what they're doing right, too."

### **Little things that make the difference**

For obvious reasons, mystery shopping stops short of actual clinical procedures, but what it pinpoints are experiences that patients and family remember long after the surgery or hospital stay is over. "Mystery shopping puts a face on what some patients called rude and uncaring behavior," says Gerber.

What she's found is that structural and organizational issues exacerbated patients' perceptions of rudeness. For instance, in one hospital she observed, it was difficult even to find your way from the garage to clinical departments. Central outpatient registration didn't have enough seating, so you had to stand or mill around in the back, possibly missing hearing your name called. And the registrar called out only the first name, so if there were multiple Barbaras or Elizabeths or Jims, someone was bound to be disappointed.

Mystery shoppers often find that staff are missing out on opportunities to market the hospital's services, Gerber recalls. At another hospital, which was pushing to expand its mammography service, mystery shoppers were told they would have to wait at least a month to get an appointment. Billingsley, who spent eight years as a hospital marketing director before he started his own consulting firm, says he was constantly frustrated by the difficulty of changing human behavior. "That's why I got into mystery shopping. It really addresses behavior on an individual basis."

Sums up Gerber: "Mystery shopping gives you a level of detail you can't get anywhere else." She adds that mystery shopping can also be a wonderful marketing tool because by using it, a hospital can demonstrate its serious commitment to customer service.

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