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Closing the Loop in Call Center Mystery Shopping

INDIANAPOLIS, IN—In our February 2002 issue we carried a story about Perception Strategies (“Mystery Shopping Provides Customer View of Call Center”) that described how the mystery shopping market research technique can work in a call center environment. Typically, the mystery shopper phones the call center and prepares a detailed report on the interaction. These calls then can form a composite picture of customer service within the call center.

Many mystery shopping companies (this is a technique long done in retail and restaurants with a slew of firms specializing in these industries) leave the process at that point. Specifically, once the report is delivered, that’s the end of the transaction. Making customer service improvements becomes the sole responsibility of the client organization.

Kevin Billingsley, President of the Indianapolis-based Perception Strategy, says his company looks to close the loop through a call center training program that’s customized to the results of the mystery shopping process. “We feel qualified to do this because we’ve done more than 11,000 shops in the last five years, most of them by phone. We have a real good idea of what customers are looking for and what’s pushing their buttons. We do this now in an informal setting with the staff of the Northwestern Memorial Hospital (in Chicago) call center and now we’re formalizing it.”

A key part of this process is a complete analysis of the mystery shopping report to understand trends and the corporate culture of the organization. For example, one element lacking in some call centers may be a commitment to asking each caller where they heard about the call center. This is an item that is often missed, he says, yet it’s one that can help an organization hone its marketing. Putting in place the obtaining of this information each and every time would put a shift into the corporate culture of the call center.

In analyzing mystery shopping reports and understanding what training needs to occur to improve performance, it is important to understand what Billingsley calls the three customer service skill categories. “First, there’s fundamental customer service skills that you should be doing 100 percent of the time,” he says. “These are things like identifying yourself properly, speaking clearly and thanking the caller for calling. Then there’s customer respect skills. It’s been our experience that the call center does a pretty good job of that. Where it falls down is if they have to transfer the call to one of the departments.”

Then, the impression created by the phone interactions becomes a coin flip, if the latter call turns out badly. That is, will the consumer recall how nice the call center was or how cold and nasty the person

answering the phone in the surgery department was, he says.

The third category is employee initiation skills. Just how helpful is the call center representative in truly solving the caller’s need—how far do they go beyond the immediate question. Does the representative cross-sell and truly listen to the caller so that a proper disposition is made. That is, a caller may call saying they want one thing, but they actually need another. How in tune is the caller representative to that?

Jean Kostelansky, Director of Physician Services at Northwestern Memorial Hospital says that Billingsley has been coming once a year to work with the staff as a follow-up to the mystery shopping process. “He sees the broader picture on customer service,” she says. “It’s not just asking the right question, it’s asking it the right way, having empathy with the caller.”

In our January 2003 issue (“Mystery Shopping in the Northwestern Call Center”), we discussed how this hospital has both its own staff and staffs at competing call centers shopped. Billingsley will report on those findings personally in his meeting with the call center staff. “He’ll also make observations such as ‘what I noticed about the group this year is that it’s much, much better about asking how did you hear about us or educating the consumer about insurance choices,’” she says.