

Using a Better Informed Workforce to Keep Customers in the Loop

BY KEVIN W. BILLINGSLEY

A daughter who is visiting her mother in the hospital mentions to a nurse that her mother will be moving in with her on the other side of town and that it will now be more difficult to get to the hospital. The nurse empathetically says, 'I can imagine.'

Empathy is good, but it will not prevent the daughter from moving her mother's relationship somewhere more convenient. The nurse could have asked the daughter where she lived so that a referral could be made to a sister hospital or standalone outpatient medical center also affiliated with the network. Ironically, the nurse does not disappoint the daughter because there is no expectation that a solution is forthcoming. A failure to make a referral is not as overt as poor customer service, which tends to irritate customers to the point of driving them away, but the outcome--lost business--is the same.

Every Employee is a Marketing Person

Healthcare administrators often nod their heads in total agreement when it is suggested that everyone in their organization is a marketing person. They understand that each employee has the power to retain customers and refer them to other services within the organization. However, recognizing the potential and doing something to foster it are two different things. For instance, do you know what kind of marketers your employees really are? What do your employees really know about your offerings and are they willing and able to deliver on that knowledge?

There is no better bang for your buck than training your employees to look for opportunities to "sell" your organization. Bear in mind, healthcare customers do not want out of the loop, (the relationship with your organization). However, the act of selling the organization is so foreign to most healthcare employees that customers perceive this lack of assertiveness as a sign that the provider does not know or simply does not care about the customer's ongoing or other health needs.

Healthcare organizations that are willing to put forth the extra effort to train their employees extend an invitation to customers to stay in the loop. Unlike traditional selling where the goal is to “get your business,” customers see this form of selling as valuable and welcomed advice. After all, finding another provider is hard work!

Mystery shopping is one way to identify selling opportunities that are either exploited or missed. Our firm has developed scenarios that would give employees a chance to direct the shopper to additional services can be developed. Our research indicates that three times as many opportunities are passed up as taken.

You Can't Sell What You Don't Know

Selling or cross-selling services requires that employees are knowledgeable about what the organization offers. “Selling” is a good term because it implies a specific mindset. In this more conscious and aggressive environment, employees direct business by expanding customer relationships with the intent of increasing the number of services sold or by referring customers to other affiliate departments or clinics. The ultimate goal is to direct consumers through the healthcare maze and make it easier for them to choose your system for all of their healthcare needs.

A healthcare provider can achieve dramatic increases in business if associates are encouraged and/or trained to take advantage of these selling opportunities. But in order for this to occur, three things must happen:

- Employees must understand the financial benefit of their actions to the organization.
- They must be able to recognize a sales opportunity.
- They must know what services are available within their own organization.

Do customers like being “sold” in a healthcare setting? Absolutely! They want your help. Having everyone sell the organization is the ultimate win/win in that you are making it easier for customers to maneuver through your system while the organization is incrementally generating more revenue. The more educated employees are on the services offered, the expertise that is available and the various access points, the more the organization benefits. With a subtle suggestion to a customer, new business can appear with no apparent source and with virtually no additional expense.

Providers successfully disseminate information to consumers in many ways, including physician referral services, websites and magazines. Yet, these do not compare to the immediacy, efficiency and flexibility of a well-informed workforce.

Identifying Opportunities to Keep Customers in the Loop

There are two types of opportunities to keep customers in the loop:

1) Customers know what they need but they do not know where to get it. For instance, when new community members who know virtually nothing about you access your network, it is critical to educate them on the benefits of the system and make the extra effort to guide the newcomer through the maze. It is not enough for any employee to respond to the newcomer's questions by simply handing them a brochure.

2) Customers do not know what the next step might be given their unique circumstances. For example, a friend of mine slipped on the ice on a poorly cleared sidewalk outside of an outpatient diagnostic center, injuring her wrist. She proceeded inside and told employees in the center about her injury. Staff's response was to take her to a physician's office in the building; the physician refused to see her because she was not a patient. They then provided her with a telephone number deferring her to the person who owned the building. As a final act, she was referred to the competition's urgent care center, located in a nearby building.

One might think that these actions were justified given the nature of the occurrence or because employees were following the rules. In fact, they did nothing wrong. But they also did not do anything *right*. The employees' actions suggested that they wanted her "problem" to disappear instead of keeping her in the loop and retaining her relationship.

Defining the Term "Customer"

Perhaps part of the problem is the ambiguous definition of a customer. Some people in healthcare, especially doctors, still do not like the term. They seem to feel that it is disrespectful to lump patients in with the rest of the masses. This could not be further from the truth. The "we are here for the patient" mentality is laudable but antiquated. Think about every individual who comes in contact with a hospital. What percentage would you believe are actually patients? Twenty-five? Twenty? Fifteen? Segregating customer groups such as patients contributes to a fundamental misunderstanding of how business is retained and new business is achieved.

When healthcare managers are asked, "Who are your customers?", they either recite a long list that includes doctors, patients, businesses, family members, visitors, vendors, clergy, other employees and community leaders, or they simply say, "Everyone." What they fail to understand is that their employees either do not believe this or cannot get their arms around this concept.

Healthcare employees have historically had a difficult time seeing themselves as a piece of the whole. The focus has been on patients and what employees were trained to do--not on the business of healthcare and customers. Missing a referral opportunity is like cutting a balloon loose and watching it drift away. You do not know where it is going to land. It may land in a friend's yard where it can be easily retrieved, or it may drop somewhere you cannot reach.

Solutions for Selling the Organization

The following are recommendations for ways to keep your customers in the loop:

- **Launch a "This is Who We Are" internal organizational awareness campaign.**
Make all employees aware of the services, locations, programs, expertise and "points of pride" (where your organization excels and who its stars are)" being offered by the organization.
- **Avoid "handing customers off."**
Expect employees to assume responsibility for customers they encounter. Passing them off to other employees usually inconveniences the customer by requiring them to restate their needs.
- **Recognize an opening by showing initiative and asking probing questions.**
For example, "Do you currently have a doctor?" "Are you aware we have a service for that?" "Can I put you in touch with someone who can assist you?" "Would you like a tour of the facility?"
- **Anticipate the customer's needs.**
Healthcare professionals should use their experience to advance the customer to the next step.
- **Never say "I don't know."**
Always provide a source and as much information as possible, for example,, telephone numbers, addresses, and contact names.

- **Conduct an audit of all your handout materials.**
Including brochures and directories. Determine if they are current, easy to use and accessible.
- **Survey your workforce.**
Determine what they know about your services, facilities and programs. Develop programs and materials to fill the information gaps you identify.
- **Train employees on listening skills.**
Conduct role-playing exercises that allow employees to see encounters from the customer's perspective.
- **Make employees aware of the value of a relationship.**
Do your employees know what a relationship is worth? Are they aware of the outcome if too many relationships are lost?
- **Gather competitive intelligence.**
Determine what, if anything, the competition is doing to encourage their employees to sell their organization or what they may be doing to win your customers.

Selling the organization is only possible when an employee cares about the organization. It takes extra effort but it sends customers the message that, "You are in good hands and need not go elsewhere." As an example, a mystery shopper recently made a call to a physician's office to make an appointment for her father, a recent bypass surgery patient, who was going to be staying with her for the summer. The caller also wanted to know to which heart specialist the physician might be referring her father. The scheduler seized on the opportunity to make the caller aware of the particular specialist her father would likely see, his schedule and the spelling of his name.

I appreciated the way she jumped in and told me there was a heart specialist who comes to their office every Tuesday at the beginning of the call. This was a good way to make me feel secure that this was the right place to bring my dad.

Everyone associated with your organization has the potential to increase the number of customers the organization comes in contact with based on their ability to sell the organization. Therefore, everyone must be seen as a salesperson with the same responsibilities for effectively representing the organization. That's keeping the customer in the loop!

This article originally appeared in the May/June issue of Spectrum, the bimonthly newsletter of the Society for Healthcare Strategy and Market Development. For more information, go to www.stratsociety.org.