

PERCEPTION STRATEGIES

Mystery shopping should be more than a supplement to patient satisfaction surveys

As a former hospital marketing director, the thing that always bothered me about patient satisfaction surveys is the fact that no matter how quickly I got back survey returns, processed the data or responded to a concern, it was still old news. The experience had occurred - the patient had spoken. The best one can hope for is to fix today that which happened yesterday.

But what if you changed your perspective and focused on the source of patient satisfaction responses – patient perception. The patient’s response is nearly always based on their perception – who they thought would be responsible for their care, how they thought they were being treated, what they believed was happening, when they thought things would occur. When a patient signals a problem on a satisfaction survey, quite typically management goes to the wrong source for an explanation – the area of the hospital being scrutinized. In most cases this results in conflicting accounts and excuses. That’s when you allow staff to rationalize that the customer was mistaken, uninformed, or just plain crazy.

One of the best ways to focus your satisfaction efforts on what customers are perceiving is mystery shopping. More and more hospitals are going to mystery shopping to supplement their patient satisfaction efforts. But while patient satisfaction seeks to resurrect old news, mystery shopping is much like public relations in that it has the capacity to shape the news. It is unlikely that a patient satisfaction survey will tell you that a front desk receptionist never gives eye contact or that an employee in the finance department couldn’t transfer a call.

Patient satisfaction is often reduced to an emotionless study of data. To coin a Seinfeldian phrase, “Not that there is anything wrong with that!” But what in life is more fraught with emotion than the hospital experience? If you believe as I do that respect for the patient is the cornerstone of this experience, then how does one determine what respect looks like? Isn’t it an “I know it when I see it” situation? Mystery shopping allows you to look for respect and any number of other emotional factors that are key to customer perception.

A focus group participant recently put the expectations of her hospital stay in clear and simple terms. With a great deal of emotion she said, “All I want is for them to be nice to

me.” As I listened to her plea, I was saddened by how low she set her standards. But in an environment where the patient feels they have virtually no control, simple kindness sometimes becomes the exception.

At about the same time, I was conducting a mystery shop of a hospital unit and struck up a conversation with a nurse who appeared to be in her early 50’s. We got on the subject of providing patient care and she offered this startling observation, “You know, if patients would just be nice to me, I’ll be nice to them.” My jaw just about hit the floor. But as contrary to logic as that statement seemed, I know where she was coming from. Both the patient from the focus group and the unit nurse believe that the patient is in no position to dictate the terms of the hospital stay. Is this sentiment the norm? Perhaps not, but these two examples illustrate the challenge ahead for healthcare. Despite the extraordinary efforts by many hospitals and healthcare providers to cause a paradigm shift in customer service, many will find it difficult to change their corporate cultures if they are not able to see their organizations through the eyes of their customers. Mystery shopping is a way to begin that process.

Another benefit of mystery shopping over patient satisfaction surveys is inherent in the focus of the latter. Mystery shopping not only addresses how the organization is perceived by patients, but by everyone – physicians, family members, businesses, vendors, and the community at large.

On a recent mystery shopping project, it became apparent that the human resources staff of a large hospital saw prospective employees as one “customer” that they didn’t need to go out of their way for. Among other things, the attitude presented on the telephone was off-putting and a routine request for an employment application was delayed because it was too close to quitting time. This went contrary to how the organization wanted to be perceived by prospective new employees, but more importantly, this behavior ignored the fact that applicants are also consumers. For example, the very next day a job seeker could be in a position to make a decision about where to have elective surgery or select a preferred provider.

Consumers collect their experiences and, as Stephen Covey examines *in The Seven Habits of Highly Effective People*, they open an “emotional bank account” with a service provider, and the degree to which they are willing to invest is reflected in an accumulation of deposits and withdrawals. Withdrawals without numerous deposits to balance the account will leave the organization emotionally bankrupt. By identifying (before the customer does) where withdrawals are most likely to occur, mystery shopping can significantly contribute to raising the bar on overall satisfaction.

Mystery shopping can also help create consistent expectations throughout all areas of the organization. Borrowing from the old Boston Tea Party slogan, I believe in “No training without observation.” Your organization may consistently train all your employees on acceptable service standards, but you probably leave it up to individual department to monitor compliance. Over time, like rainwater seeking out cracks in the pavement, departments will determine their own level of acceptability depending on whether or not

department managers think senior management is truly behind the initiative, as well as numerous other factors. The only way to maintain high service standards is to constantly observe adherence to these standards across all areas of the organization. Because you want the process to remain unbiased, using an outside third party is the most effective way of doing this.

Mystery shopping is both subjective and objective at the same time. It is objective in that shoppers are not associated with the organization and have no vested interest other than to help the client uncover areas of inconsistency. The subjectivity lies in the fact that the shoppers bring their own experiences and background to the project. I prefer to put together teams of shoppers who have theatrical backgrounds. Thespians often see mystery shopping as another role to be played and feel more comfortable acting out scenarios. Because of their stage experience, they understand what it means to be prepared and, as a result, are less likely to get frazzled when there are little twists during the encounter.

Mystery shopping can also serve a key role as a component of what I call “Moment of Truth Assessments.” The term moment of truth, which originally comes from Jan Carlzon’s book *Moments of Truth*, refers to an encounter with a customer where the employee’s handling of the seconds involved can run the range of falling short of or exceeding customer expectations. The assessment consists of the following:

- A focus group-type session with staff to expose the current processes used to handle customers, uncover worst-case and best-case scenarios and review perceived adherence to service standards. This is the stage that gathers information on *what employees say they do*.
- Separate sessions are held with management to explore their specific customer service practices, i.e., service culture, teamwork, staff evaluations, observation activities, complaint resolution, and training. This stage focuses on *what employees are expected to do*.
- Mystery shopping is conducted and targeted toward specific objectives established for the department or organization. This stage identifies *what employees actually do*.
- As an option, the competition is shopped to help establish a benchmark. The same objectives used inside the organization are applied to the competition so that there can be an apples to apples comparison. This stage sets the standard for *what employees should be doing*.

A Moment of Truth Assessment is especially effective when a particular area of the hospital is targeted for customer service improvement. The focus group, management session and expanded mystery shopping program serve as the foundation for a full departmental evaluation. From this assessment, training and revised management practices are developed with the goal of creating a departmental culture that is now capable of showing the way for the rest of the organization.

The Alliance Report, June 2000. Written by Kevin Billingsley, President, Perception Strategies, Inc.