

Six Steps to Customer Satisfaction — From Patient Survey to Action Plan

By Kevin W. Sullivan

Practice leaders understand the need to be the provider of choice in their service area. However, a difference exists between practices that achieve best in market prominence and those whose results fall short of expectations. This article summarizes the experience of small and large medical groups and identifies the strategies that mark providers of choice in competitive markets nationwide.

System vs. sermon

In health care, you can manage performance two ways. Clinical, technical and procedural expectations are carefully defined, closely managed and not optional. Service expectations are too often loosely defined, managed through in-service pep-talks, and left to the discretion of physicians and employees.

As a consequence, performance varies among departments and practice sites — particularly when medical professionals go on autopilot in the face of heavier workloads, demanding patients, lean staffing and limited resources.

Many Medical Group Management Association members use a more formal and businesslike process for measuring their strengths and weaknesses and convert the findings into workable action plans that produce immediate improvement and ongoing results.

Figure II.B.6 illustrates a six-step process used by best-practice organizations — single- and multispecialty groups as well as independent practice association provider networks — to analyze strengths and weaknesses, define service standards, monitor performance, hold people accountable for results and recognize top contributors.

Step 1 — Service assessment

To build a business plan to protect your existing revenue base and generate new market share, you need to take the first step and know how customers perceive your service strengths and weaknesses.

Use a patient survey as your tool to obtain feedback from a large number of people who offer a customer’s perspective on how it feels to access your services. All questions should have a positive statistical correlation with overall satisfaction, which

means that any increase in scores will improve your market position.

More detailed information can be found in mystery patient visits in which an experienced observer can spot strengths and weaknesses in the specific performance areas that affect patient loyalty and referrals.

Finally, surveying and interviewing your inside customers — board members, physicians, managers and staff — not only produces essential feedback, but also builds stronger support for your action plan among people who are consulted beforehand.

Figure II.B.6

The six-step customer service initiative

1. Conduct a baseline service assessment

- Patient satisfaction survey
- Mystery patient visits
- Physician, supervisor, staff surveys
- Key-leader interviews

2. Leadership involvement (buy-in and objectives)

- Review service assessment
- Set quantifiable goals
- Form customer service committee
- Develop action plan

3. Develop service standards

- Develop customer-centered performance standards
- Incorporate into job descriptions
- Integrate into the performance appraisal process

4. Conduct training workshops

- Physicians and mid-levels
- Managers and supervisors
- Clinical and support staff

5. Track performance (benchmark)

- Use dashboard monitoring and reporting
- Monitor progress
- Provide support to departments

6. Momentum strategy

- Ongoing communication program
- Booster meetings
- Recognize top performers

Group Practice Leadership

Figure II.B.7 Patient survey findings

	Mean score	Percentile ranking	90th percentile
A1. Ease of making appointments by phone	4.56	67.7%	4.76
A2. Appointment available in a reasonable amount of time	4.47	73.0%	4.70
A3. The efficiency of the check-in process	4.54	60.2%	4.73
A4. Waiting time in the reception area	4.08	57.6%	4.47
A5. Waiting time in the exam room	4.06	60.6%	4.44
A6. Keeping you informed if appointment time was delayed	4.10	53.1%	4.58

Step 2 – Leadership involvement

Every provider needs to perform as if customer satisfaction is the key to protecting the existing revenue base and generating new market share. Furthermore, research has proven that satisfied patients don't litigate, and that happy employees surpass those who clock in for a paycheck. In terms of medical quality, there is a direct correlation between patients who are satisfied with provider communication and compliance with treatment plans, which leads to improved medical outcomes.

Convene a meeting of board members, physicians and managers — all the people who will be involved in implementing the action plan. Review the findings of the service assessment and ask the group to help set improvement priorities for the coming year. This is also a good time to formalize responsibility for coordinating the implementation process through a customer service committee comprised of physicians, managers and employees — with at least one board member in an ex-officio capacity.

Bristol Park Medical Group Costa Mesa, Calif., took a unique approach to building its customer service action plan. In a half-day meeting, 44 board and committee members, medical directors, administration and department heads reviewed the assessment, set priorities and goals and assigned responsibilities to designated task groups. The leadership team reviewed progress at every monthly partner meeting and modified strategies as needed.

You can use patient survey findings to set improvement priorities. Figure II.B.7 shows how survey scores can be viewed in terms of their percentage rankings. You can use the percentile rankings to determine which areas to address as well as the score you'll need to rank in the top 10 percent of the database.

In Figure II.B.7, the mean score for question A1 ranks at the 67.7 percentile of the benchmark database. A score of 4.76 must be reached to rank in the top 10 percent of the database.

In taking this approach, your practice will have quantifiable goals to measure progress. With specific goals, the customer service committee can now brainstorm strategies for raising the score from 4.56 to 4.76 by the next time you survey your patients.

Step 3 – Service standards

Service performance needs the same careful definition as clinical and procedural criteria — not only for employees but also for physicians and nonphysician providers who are part of the delivered product. Successful practices connect improving scores on specific survey questions with job descriptions and annual performance appraisals.

Physician standards should reflect the four phases of the patient encounter: establishing rapport, eliciting information, educating the patient and ensuring compliance. The standards should also include issues related to staff relations, peer

relations and partnership or professional criteria.

Employees must address customer service as a priority, not an option or an ideal to be pursued only on good days. Rather, exceeding customer expectations must become a part of the practice's mission and values — as important to professionals as medical quality and technical expertise. Staff performance standards should include making a great first impression, using appropriate telephone etiquette, handling patient complaints and creating a team environment within and among departments (See Figure II.B.8).

Rockwood Clinic, Spokane, Wash., made its service standards the centerpiece of physician seminars, manager development and staff workshops. To ensure the effectiveness of the training, the customer service committee began a series of self-directed mystery patient visits and engaged consultants to conduct shadow coaching encounters for low-scoring physicians.

Step 4 – Skills training

Once you publish and understand the standards, conduct training seminars to enable everyone in your practice to meet or exceed the standards. As an example, patient surveys usually contain a question about the amount of time the physician spends with a patient. Your doctors need to understand that answers to this question have nothing to do with actual minutes spent in the exam room. Top ratings go to physicians who know the techniques

Figure II.B.8 Customer service standard (Staff)

Make a great first impression

1. Acknowledge patients immediately; use eye contact and smile
2. Let patients know of expected delays; keep them informed of their status
3. Use the patient's last name until you sense using first names is appropriate
4. Use layperson's language whenever possible
5. Be an active listener; pay attention to what the patient is saying
6. Be helpful to patients who need help finding their way around the facility
7. Give clear directions; answer all questions with patience and professional concern
8. Reassure anxious patients; ask what you can do to make things easier
9. Conclude with a friendly thank you

that make patients feel that the limited encounter time was well spent. Body language, eye contact, active listening and other validating behaviors produce satisfied patients and high survey scores.

Similarly, staff members can learn and practice techniques that enhance patient satisfaction. When rooming the patient, for example, medical assistants get high marks when they make congenial small talk and use the patient's name.

Once you've trained front- and back-office people in customer-pleasing techniques, a special effort should be made to improve the leadership skills of those responsible for medical and staff management. A formal manager training program will emphasize skills for team building, conflict resolution, correcting unsatisfactory performance, preparing and conducting objective performance reviews and other key subjects.

Step 5 — Tracking mechanisms

Establish tracking mechanisms to measure progress and keep customer service at the top of everyone's agenda. Use follow-up patient surveys, referrer and insider surveys, requests for records transfer, exit interviews of departing physicians and staff members and number and source of complaints. Develop monthly reports and reserve a portion of each partner-management meeting to review them.

Step 6 — Momentum strategy

The final step in your action plan involves momentum — promotional activities that keep customer service in the minds of every member of the practice and recognition programs that reward top performers. Small and large practices can use a variety of strategies to encourage top-level performance by rewarding those who excel at customer satisfaction.

Some practices establish programs in which service stars receive public recognition; others install bonus formulas in which high-scores on customer surveys equate to monetary awards. In any case, these programs help practice managers reinforce their commitment to customer satisfaction.

Enhance momentum by publishing the results of regular patient surveys and referring-physician surveys for single-specialty practices that depend on referrals for a major portion of new patients.

In addition, many best-practice groups maintain a continuing schedule of mystery patient assessments, where trained observers use first-hand observations to look beyond the survey data, identify specific performance areas and recommend practical strategies for improving the survey scores.

Bright Medical Associates, Whittier Calif., uses monthly reports from mystery patient visits and telephone calls to help physician-manager teams spot deficiencies in daily operations or performance and develop fast-track action plans to improve customer satisfaction.

Many practices use shadow coaching as an effective strategy to improve customer satisfaction. A trained consultant dons a lab coat, poses as a writer doing a story, and follows the physician through a day's encounters — after which the low-scoring doctor receives direct, one-on-one feedback on how he/she interacted with patients seen during the day.

Putting it all together

The six-step process closes the disconnect that often exists between leadership plans and front-line performance. It produces a cultural change in meeting and exceeding customers' service expectations. The process emphasizes that service is not an option and holds each member of the practice accountable for making internal and external customers feel valued and important.

Your practice benefits by gaining greater patient loyalty and more patient referrals.

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