

Mystery Shopping Program

The Problem

Customer service reception for ambulatory telephone scheduling and waiting rooms is inconsistent with some areas needing improvement. Timely appointment access is an issue for many ambulatory practices. Patient satisfaction scores in these areas confirm the need for improvement.

Aim/Goal

Revisit/revise ambulatory customer service standards as needed. Review with managers and retrain staff. Develop measures to regularly monitor performance for customer service and test appointment availability. Maintain an ongoing focus on achieving customer service goals.

The Team

- Dr Mark Zeidel, Chief, Department of Medicine
- Jayne Sheehan, Senior Vice President, Ambulatory Services
- Joanne Casella, Director, Department of Medicine
- Sarah O'Neill, Director, Ambulatory Services
- Sherry Calderon, Project Manager, Ambulatory Services

The Interventions

- Standard expectations and measurement made available on shared drive
- Development of mystery shopper training program, and hiring an internal pool of diverse per diem shoppers using consistent, neutral methods of shopping, including:
 - One program for the telephone scheduling experience, including noting business days to the first available appointment
 - One program for waiting room reception and oversight of patient flow
- Regular monthly meetings in Medicine, chaired by Dr Zeidel, with physician and administrative representatives from all practices to ensure regular review and discussion of results
- Transparency of results – all outcomes posted on shared drive

The Results/Progress to Date.....

- **80% improvement** in Medicine telephone customer service ratings in one year - from baseline of 2.6 to sustained score average of 4.7 (1=poor; 5=excellent)
- **104% improvement** in Medicine appointment lead time in 2 years – from an average of 12 to 5 business day lead
- Moving from 75% average compliance with waiting room standards to **86.8% compliance** across all ambulatory practices in 1 year

Lessons Learned:

- Senior administrative and clinical leadership buy-in, coupled with regular meetings to review/discuss results is critical

Next Steps/What Should Happen Next:

- Develop institution wide steering committee to:
 - Establish BIDMC standards, as agreed upon by senior leadership
 - Develop prioritized roll out of program across institution
- Support ambulatory practice leaders to achieving the FY 08 AOP goals:
 - 4.8 average customer service rating (scale 1-5) for telephone service
 - 96% compliance score (out of 100 possible points) in waiting room performance
- Partner with marketing to ensure phone numbers in promotions are shopped to ensure quality in advance of materials going out

