

MYSTERY SHOP 'TIL YOU DROP

It is better to ask some of the questions than know all the answers.

James Thurber

The best questions you can ask your patients are “How am I doing?” and “How can I better serve your healthcare needs?” Only by asking these questions can you discover how to improve your practice for yourself and your patients.

Everybody, including physicians, sees him- or herself as wonderful. And why not? If you are not getting any feedback, it is easy to assume you are doing a great job. Sometimes the only feedback you get, either positive or negative, is when a patient leaves the practice, when a patient starts complaining, or when an attorney asks for a copy of a patient’s records. But then you usually think it is the patient’s fault. So you never really get a chance to assess your practice objectively.

If you want to make improvements, you have to be willing to look at yourself and your practice—warts and all—to hear some things you do not want to hear, and to examine the fine details of your practice under a microscope. In the preceding chapter, I outlined the most commonly used patient survey techniques. One of the best ways to critique your practice is to have someone pose as a patient and visit your practice.

Mystery shopping is a tool used by market research companies to measure quality of service or to gather specific information about the practice. Mystery shoppers posing as normal patients perform specific tasks—such as asking for an emergency appointment, calling for a second opinion, or registering complaints or behaving in a certain way—and then provide detailed reports or feedback about their experiences with the practice.

Now, you cannot ask your staff, your spouse, or your office manager to act as a mystery shopper. They have so much bias that they could not possibly be objective. Also, if they walk in the door trying to impersonate a patient, it would not be a mystery! But you can invite a mystery shopper to your practice. It is an excellent opportunity to look objectively at your practice through the eyes of a sophisticated surrogate patient. A mystery shopper is a marketing professional who has been trained to survey and evaluate the ways in which businesses serve their customers. Typically, they are hired through marketing or public relations firms.

This technique has been used by businesses for years. Hospitals have used mystery shoppers to evaluate the user-friendliness of their facilities. According to a 1997 article in the *New York Times*, mystery shopping consultants are also gaining favor as an increasing number of health maintenance organizations and doctors' offices try to attract more patients.¹ A search on the Internet yields scores of companies devoted to mystery shopper research.

A mystery shopper gives you an opportunity to identify those "moments of truth" when the patient interacts with you and your staff. If you can manage those moments of truth effectively, patients will feel good about you and your practice. They will not only remain as loyal patients but they will also tell others about their positive experiences with your office.

When you decide to hire a mystery shopper, be prepared to move out of your "comfort zone." Resolve not to be defensive about the results. The only way to get better at what you do is to be willing to hear objective criticism and to make the necessary changes.

You can find someone to mystery shop your practice from your hospital (nurses are especially good at these evaluations); a local college may have students or faculty members who are willing to perform this function; or, you can ask a pharmaceutical representative if he/she has a partner who would be willing to serve as a mystery shopper for your practice.

There are professional mystery shoppers who charge \$1200–\$1500 per doctor evaluation and from \$150 to \$250 per hour for an in-person shopper. I have included a resource for locating mystery shopper vendors at the end of this chapter.²

Here is how I arranged for the mystery shopper to come to my office. I asked my hospital's public relations department to locate a professional mystery shopper to evaluate my practice. I refrained from telling my staff that the mystery shopper would be coming, and I suggest that you do the same. I did not want my staff to be on their "good behavior" only for the evaluation. In addition, I was not told when the mystery shopper would be visiting. I wanted to be critiqued according to the same standards as my staff.

Once you arrange for a mystery shopper, there are several things you should do. You should ask to see the questionnaire that will be used to evaluate your practice. Most mystery shoppers work from ready-made questionnaires (such as the one presented in Exhibit 2–1), but you may be able to add some items regarding the observations you would like to have included.

The idea behind the mystery shopper is to get as authentic an impression of your office as possible. You should make sure the shopper intends to include the following suggestions.

The mystery shopper should call for a routine appointment but then ask to be seen earlier than the date given. For example, after making the appointment, the mystery shopper

Exhibit 2–1 *Mystery Shopper Checklist*

Call the doctor's office to make an appointment. Your ailment is a urinary tract infection. Tell the office that you are new in town and will be bringing your records with you to the visit.

1. Ask for directions to the office from a specific neighborhood.
2. Ask what insurance they take, the cost of an initial visit, and if they take VISA or MasterCard.
3. Ask the office hours.
4. When you make this call, also check:
 - promptness of staff in picking up the phone
 - how long you were kept on hold
 - courtesy in greeting
 - tone of voice
 - willingness to give information to you
 - willingness to work the appointment into your schedule
 - promptness in scheduling the appointment
 - any pre-instructions, preparations, etc.
 - knowledge of directions, office information, hours, insurance, etc.
 - staff ability to provide clear, concise, and understandable directions to the office
 - whether staff directed you to the practice's Web site
 - whether staff informed you about the payment expectations
 - whether staff reminded you to obtain an authorization from the primary care physician before the appointment

The next day, call the office and cancel the appointment. Wait a day and call back to reschedule. Check the above factors again.

The day you go to the office, fill out the application with bogus information. Check the following:

- general appearance of office
- promptness of greeting upon walking up to window
- manner in which you are greeted (eye contact, smile, pleasant voice, etc.)
- amount of time you wait before being seen
- general comments of patients around you in the office (you might ask a few patients what the doctor is like, explaining that you are new in town and this is your first visit)
- noise factor in office—for example, can you hear discussions with patients in the next room?
- any possible HIPAA violations, such as other patients' charts left on a counter that could be seen by the mystery shopper
- any other items or factors you notice

Courtesy of Christine Albert, Department of Marketing, Touro Infirmary, New Orleans, LA.

can call back and state that he or she needs to see the doctor sooner. This allows the shopper to observe how your staff handle this typical situation.

The mystery shopper should also ask for directions to the office to verify that the staff can provide adequate instructions over the phone. He or she should record whether the appointment scheduler discusses fees and the method of payment on the initial visit.

The mystery shopper might also ask about your credentials (for example, whether you are board certified). This is an important point—you need to know if your staff can describe your qualifications accurately to prospective patients.

The mystery shopper arrives 15 to 30 minutes before the scheduled appointment. This allows the shopper ample time to register and then sit in the reception area and listen to the conversations of the patients and their families. Often these conversations will provide insight and valuable information about how your patients perceive you and your staff. During this time the mystery shopper takes note of general reception area decor, reading materials, pamphlets, and brochures as well as other items you may have provided to occupy patients while they are waiting for the doctor.

If your practice has a significant percentage of senior citizens, it will be important for your mystery shopper to evaluate your practice from their perspective. Ask the mystery shopper to consider the lighting, the legibility of your print material, the comfort of your chairs in the reception area, the ability to accommodate wheelchairs and other patient aids, and any extraneous sounds that make listening to the doctor difficult. In Chapter 22 you will learn other techniques to make your practice attractive to seniors and matures.

The mystery shopper records the time he or she enters the office, the scheduled appointment time, the time he or she is escorted to the examining room, and how long it takes you to arrive in the examining room.

The mystery shopper should note whether your staff members are courteous. Do staff members smile? Do they introduce themselves and use their titles? Do they use the patient's name? Do they appear interested in the patient? Do they appear to enjoy their work?

When you arrive in the examination room, the mystery shopper should observe your manner and your style of history taking. Do you immediately start asking about the shopper's medical problem or do you ask about his or her family, work, and hobbies? Depending on the background and skills of the mystery shopper, he or she can pretend to have a medical problem. This is important for evaluating how you take a history.

Mystery shoppers can identify themselves at this stage and avoid the physical examination. This was the case with my mystery shopper, whom I did not suspect until, at the conclusion of taking her history, I told her that I was going to step out of the room and tell the nurse to come in so that I could *examine* her. At this point, she said, "Wait, wait, that won't be necessary. I'm your mystery shopper!"

Although mystery shoppers will want to avoid the physical exam, they usually still go through the checkout process and either pay by check or cash, which should be refunded immediately. Another possibility is to allow the mystery shopper to say "I left my check-book at home" to observe your staff's diplomacy in handling this typical situation.

Finally, the mystery shopper should provide a written summary of his or her experience in your office. It is only through close scrutiny of yourself and your staff that you can identify

those moments of truth when you and the staff members have the opportunity to make a good impression. When you do make a good impression, you can be sure that you have fostered loyalty in a patient. That person will not only return to your practice but will also tell others about his or her positive experience with you and your office staff.

By the way, our report card from the mystery shopper was a good one. Otherwise, I would not be writing this book!



The Bottom Line

Taking the extra step of hiring a mystery shopper will help you unravel the hidden secrets to practice success.

NOTES

1. Morrow, DJ, "To Rate Hospitals, She Dons a Wig and Practices Her Cough," *New York Times*, March 30, 1997: Section 3, p. 9.
2. The National Committee for Quality Assurance (www.NCQA.org) has an online database of vendors who conduct patient surveys. National Research Corporation conducts patient satisfaction surveys using telephone, mail, and kiosk-based questionnaires. The cost of a typical mailed questionnaire is \$250–\$500.

