

## *The Patient Experience Post*

Healthcare's Resource for  
Service Excellence  
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Since the mid-1990s, Baird has helped healthcare organizations nationwide improve the patient experience and enhance organizational culture. Baird's culture assessment and diagnosis include experience mapping, medical mystery shopping, and focus groups to reveal the real customer experiences within your organization. Using your patients' experiences, Baird and her team prescribe critical next steps for improving patient satisfaction and HCAHPS scores.

## Mystery Shopping in Healthcare Yields “Aha Moments”

by Kristin Baird, RN, BSN, MHA

It's no mystery that the patient experience drives the organization's reputation. And yet, many hospitals and medical practices remain baffled about which experiences are driving their patient satisfaction scores. This quandary was the impetus for the Baird Group establishing our medical mystery shopping division. Our goal is to drill down into the patient experience pathway and evaluate each touch point by describing not only the facts, but the patients' emotional response to specific encounters, events, and environmental factors.

Recently, we began posting some [articles on LinkedIn](#) about mystery shopping, and we've been delighted with the response both in terms of the number of “likes” we're receiving and in terms of the comments and what they have taught us.

One of our most popular posts—Mystery Shopping in Healthcare Yields “Aha Moments”—pointed out that the concept of medical mystery shopping isn't as widely known as we previously thought. We've been engaged in medical mystery shopping for so long now that we take for granted that *everyone* knows what medical mystery shopping is and how it's done. Yet we can't assume that everyone is aware of the value of getting a third party perspective on the patient experience through ethnographic research (aka “mystery shopping”).

Even those not previously familiar with the concept were able to quickly discern its value. As one pulmonary clinician said in a comment on LinkedIn, “Amazing how your perception of a place is different when you experience it as a patient/customer. Totally lets you know if a place is really 'walking the talk' or putting on a good show.”

That pretty much sums up what mystery shopping is all about and the value it can have for healthcare organizations, from hospitals, to urgent cares, and private practices. This form of qualitative research is frequently used as a quality assurance measure.

### **How Mystery Shopping Works**

Mystery shopping, or secret shopping, is a tool used by companies in a wide range of industries from retail and banking to hospitality. It is most commonly used to measure the quality of their products and services. Mystery shoppers pose as normal customers to gather information about actual service experiences. In the healthcare industry, shoppers pose as patients, or patient friends, and family members to assess the quality and consistency of patient experiences.

While an increasing number of healthcare organizations are using mystery shopping to help them unearth both the stars as well as the opportunities to improve patient care (and, ultimately, CAHPS scores and reimbursement), some still balk at the concept.

In fact, one RN who commented on our LinkedIn post said: “Hmmm. So now I need to worry that every word & every move I make is being observed by some mystery shopper!!!” She went on to make the point that whether a lab tech, for instance got

the required amount of blood safely and correctly the first time is more important than how that lab tech might have communicated with the patient. She summed up her comment with: “Let’s focus on patient care not fluff.”

She’s certainly not alone in her views. Despite the fact that the AMA Ethics Committee has recommended using mystery shopping, there has been some push back from its members. We feel, and our experience supports this feeling, that these concerns are unfounded. First of all, the experience is happening to the patient who is often openly sharing opinions in conversations, including social media.

#### “Fluff” Matters!

The comment from the nurse cited above implies that patient care is solely about clinical outcomes and not the manner in which that care was delivered. It’s high time to recognize that it is no longer an “either, or” proposition, but rather “both, and.” Patients expect clinical competency *and* respectful, compassionate service.

Through our experiences with dozens of hospitals around the country we’ve provided administrators with a wide range of “aha moments” that were right under their noses, but that they literally didn’t see. Why? Because they are generally “too close” to the task and not seeing things through the patient experience lens. They missed not only the opportunities to improve but the internal best practices that should be duplicated throughout the organization for a more consistent brand experience.

Often it can be the “little things” that have the greatest impact—not only in terms of patient perception but also in terms of clinical outcomes. It is the effective delivery of both top-notch service and exceptional clinical care that leads to the most positive patient experiences.

Assume that a patient has decided to engage with your hospital or practice. Long before they come in contact with the provider, they are bound to have multiple experiences. *Everything* about the patient encounter must instill trust that the entire organization is delivering on the promise of safe, high quality healthcare. Everything a patient sees, hears, smells, and touches should be aligned with the promise. Did he feel respected? Did she feel her privacy was guarded? Did he understand what was said? Did she feel confident that she knew what to expect next? Was he kept informed? Did the physical environment instill confidence about cleanliness and privacy?

These are only a few of the things that a mystery shopper can tell us about an encounter. Importantly, what we find more often than not is that it’s the little things that make the biggest difference in boosting or destroying a patient’s confidence.

Face it. We’re human and will often become ‘immune’ what is normal to us. When we can see our world through fresh eyes, the information can be invaluable. Mystery shoppers can help reveal the aha moments vital to the culture, image, and reputation.

Learn more about the various types of mystery shopping [here](#).

[Register](#) for the upcoming webinar.



Transforming culture. Shaping patient experience.

Watch for the new white paper being released in September.

*Phone communication is an essential part of the patient experience and is often the first part of the patient experience. In just seconds, your patients are deciding if you are friendly, knowledgeable, concerned, and willing to help. In fact, research shows that after just a 2-minute phone encounter, patients are clear about whether or not they would return to your organization or recommend it. Patients rely on phone encounters to make appointments and seek clinical advice. Other callers rely on phone encounters to gain vital information about a loved one. In both situations, it's important that you create a positive, trust-building experience. To engage your staff in essential phone skills, look toward the tips and tools in [You'll Have Them at "Hello": Phone skills that will WOW your callers every time](#). For only \$199, you'll receive the following: the video recording, presentation slides, a transcript of the recording, a participant guidebook, a moderator guidebook, a quality assurance tool, and additional handouts! This session is also available as a live training workshop.*

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Nurse, author, and consultant Kristin Baird, "Healthcare's Customer Service Guru," is the author of *Raising the Bar on Service Excellence: The Health Care Leader's Guide to Putting Passion into Practice* (Golden Lamp Press, 2008), *Reclaiming the Passion: Stories that Celebrate the Essence of Nursing* (Golden Lamp Press, 2004), and *Customer Service In Healthcare: A Grassroots Approach to Creating a Culture of Service Excellence* (Jossey Bass, 2000). The Baird Group provides consulting, mystery shopping, and training services for improving the patient experience. To learn more, please visit <http://baird-group.com> or call 920-563-4684.