

## 3 Ways Medical Mystery Shopping Can Shed Light on the Patient Experience

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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.

Baird Group has been a trailblazer in the field of medical mystery shopping for more than 15 years now and [we've learned a lot along the way](#). So have our healthcare clients.

Medical mystery shopping – also called secret shopping, or ethnographic research—involves Baird researchers [taking on the role of a patient or family member](#) as they interact with healthcare systems by phone or in person. During these interactions, mystery shoppers make note of everything they experience, along with their feelings. Documenting the emotions evoked by specific events, interactions, or the environment is an important element of the research. After all, it is the emotional response that drives consumer behaviors. The beauty of mystery shopping is that you can learn how every touchpoint is viewed by the patient. It is that narrative that explains the “why” behind the quantitative satisfaction surveys.

Mystery shopping reports give actionable recommendations for making improvements in people, processes, and place to positively impact the patient experience and, ultimately, HCAHPS and other satisfaction scores.

There are many reasons healthcare leaders choose to do mystery shopping. Here are the top three:

- **Get the Facts—and the Feelings**

Let's consider a simple, and common, example. A patient walks into the emergency room and sees 15 people sitting in the waiting room. She immediately thinks, “Oh no, it's crowded so I'll be here forever.” As she approaches the registration desk she sees two nurses standing behind the receptionist, engaged in conversation and the receptionist looking at her smart phone. The patient documents her emotion at that moment as, “It made me feel insignificant when nobody paid any attention to me. I also thought, ‘There are so many people in the waiting room and it doesn't look like the staff is doing anything. Should I just leave?’”

In that brief experience we are able to give facts and feelings that can help shape behaviors. Perhaps the two nurses were engaged in a discussion about a critical case and the receptionist was helping them get in touch with a physician or specialist.

What's “really” happening, though, is hidden from the patient. The patient only knows what they see—and how they feel.

- **Stories Build a Burning Platform**

I like to say, “Stories move data from the head to the heart,” because that's exactly what they do. When we look at quantitative data, from a patient

satisfaction survey for instance, there is a tendency to argue away the data—“We’re different,” or “Only the unhappy patients fill out surveys.” It’s not so easy to do that, though, when a medical mystery “patient” documents step-by-step, what was happening and how it made them feel. Those insights provide a unique glimpse into the patient mindset in a much clearer, and much more impactful, way.

- **Identify Real Opportunities**

Medical mystery shopping can help healthcare organizations—from small clinics to large, integrated, multi-specialty healthcare systems—identify coaching and training opportunities, as well as their star employees who consistently make a positive impression on patients and their families. Once identified, you can leverage these star performers to help coach, counsel, and mentor others.

So often, when we’re in the trenches and working day to day in our organizations, we lose sight of the three things that shape an experience - people, processes, and place. Well-meaning leaders may put a process in place, not considering the long term impact. We’ve seen processes put in place for internal administrative reasons and, while they make sense from that point, they may not make a positive impression on patients.

**Here’s an example that one of our medical mystery shoppers observed and reported:** We were engaged to mystery shop an emergency department that was struggling with low satisfaction scores. Internally, everyone was convinced that it was the wait time and nothing else causing the dissatisfaction. The client was very surprised to learn that wait time was not as impactful as the overall waiting room experience. One of our shoppers observed that every patient who came in was asked to get a urine sample and to hold on to that sample in the waiting room until called. The mystery shopper noted that she was disgusted by all the people holding urine samples or placing them on the floor beside their feet where they were getting kicked over. The shopper also observed and reported a male patient who had a look of disgust on his face. Following his gaze, the shopper realized he was observing another patient holding her urine sample in her left hand while eating a bag of chips with her right hand. That policy about getting urine samples made sense to someone at some time but didn’t take into consideration the impressions it was creating the waiting room.

In addition to the tumbling urine specimens, the waiting experience was further compromised with a blaring television, filthy bathroom, and the sound and smell of a patient vomiting.

Medical mystery shopping is a powerful way to get a realistic sense of place. We can get so accustomed to our facilities and what they look like, that it often takes a fresh set of eyes to spot the things that we’ve overlooked—everything from parking availability to lighting, cleanliness, and smell. We’ve had many

situations where we've snapped photos to show our clients things that they just couldn't believe.

### What Aren't You Seeing in Your Facilities?

These mystery shopping observations are sometimes big things, and sometimes small. But, even the small things can add up and impact a patient's decision to return—or to recommend your facility to others. Considering that the lifetime value of a single patient ranges between \$1.4 and \$1.6 million, even the little things shouldn't be left to chance. Medical mystery shopping can make a difference. By knowing about, and fixing problems, you stand a much better chance of building loyalty and customers for life.

This whitepaper drills down into medical mystery shopping and addresses some of the most frequently asked questions.

Are you ready for the truth? If you think your organization could benefit from a non-biased, third-party look at the patient experience in your facility, give us a call at 920 563 4684.

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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.