

## *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.

## Real Patients – Real Names – Real Problems Resolved

by Kristin Baird, RN, BSN, MHA

### **The Things You May Not Know About Medical Mystery Shopping, Baird Style**

A recent request for mystery shopping services pointed out poignantly how Baird is different. A healthcare organization, concerned about its ability to adequately screen for Ebola, asked whether we could do a mystery shop to assess their response.

Our answer: an emphatic “no”! Why? Because this is just one example of an issue that could potentially raise ethical concerns. There are, after all, requirements for reporting anybody presenting with symptoms of Ebola and, in this case, that would put our patient, the healthcare organization—and us—at risk. It would simply be the wrong thing to do.

### **The Ethics of Medical Mystery Shopping**

The request got us thinking about our approach to mystery shopping and some of the things that set us apart, both in terms of our strict adherence to certain processes and procedures that we feel are a must and in terms of the, sometimes amazing, ways we've been able to positively impact not only the organizations we serve but, in some cases, the mystery shopping patients as well.

Our medical mystery shoppers are real people. When they interact with our client organizations they're not “incognito”—they are using their real names and their real social security numbers because we are committed to preserving the doctor/patient relationship and, importantly, the health of our patients. Because, after all, medical mystery shoppers are real people who sometimes have real medical problems. We want to ensure that if an adverse medical condition is ever discovered in the course of mystery shopping that the doctor or hospital can contact that individual with necessary treatment.

In fact, one of the commitments we have is not placing a patient in a situation of potential harm. So, for instance, we're not going to send a woman in to have several mammograms and expose her to unnecessary radiation. We're going to find medical mystery shoppers who need a mammogram and we're going to have them assess—from a real patient perspective—that experience. Sometimes with memorable and meaningful results. In one recent situation, for instance, our medical mystery shopping patient's mammogram detected breast cancer. She needed surgery and chemotherapy. This of course benefited the patient and the organization being assessed. That was an impactful moment for all involved.

Another mystery shopper—a man who had not been able to afford a healthcare visit for some time—went in for a physical as a medical mystery

shopper. Due to abnormal lab results, he was scheduled for a return visit and learned that he needed open heart surgery. Another impactful moment for the individual, but also revealed important opportunities for the practice.

### Supporting Staff and Ensuring Transparency

In addition to our top-of-mind concern for patient safety, including medical mystery shopper patient safety, we are also committed to staff support and transparency. We will not overwhelm a practice or a switchboard for a study. We work with our clients to spread calls and contacts across several weeks, ensuring that we schedule these contacts at times when staff is not already stressed.

We are also committed to transparency. While it's always up to the client how they wish to handle the medical mystery shopping studies with their staff, we always advocate for transparency- ensuring that staff is aware that there is the potential for their practice to be part of a medical mystery shopping study. In addition, we also advocate for the sharing of results—at a high level—following the study. While we don't want to call out individuals who may be identified as needing some additional training or coaching, we do want to share the overall results and, as appropriate, any examples of exceptional patient care or service that were observed. It's always wonderful to be able to point to exceptional examples of patient care advocates who can serve as role models.

The bottom line: medical mystery shopping can be a great way to gain non-biased insights about the care and service being delivered by your organization. But, there are a myriad of considerations that must go into the process of ensuring that these activities are ethical, create no patient safety concerns, consider the needs of staff and result in meaningful, actionable insights for all.

That's the Baird way.

Interested in learning more—check out our [recent webinar](#) on medical mystery shopping.

**Did You Know:** Medical mystery shopping can be a great way to test your organization's capacity for a new service launch or the introduction of a marketing campaign to drive new patients to your facility? You don't want to promote what you can't effectively deliver. Check it out first through Baird's proven approach to [medical mystery shopping](#).

*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"](#):*



Transforming culture. Shaping patient experience.

*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.*

To learn more about the [Baird Model for Service Excellence](#), employee engagement or leadership development workshops, or to sign up for her FREE newsletter, write to [info@baird-group.com](mailto:info@baird-group.com).

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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.