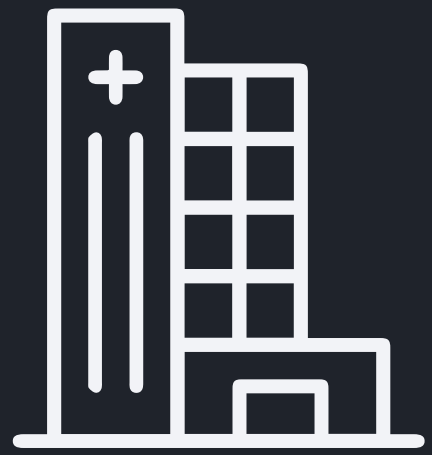


Achieving Strategic Objectives Through Mystery Shopping



A GROWING CLIENT WITH...

300+
sites

3
states

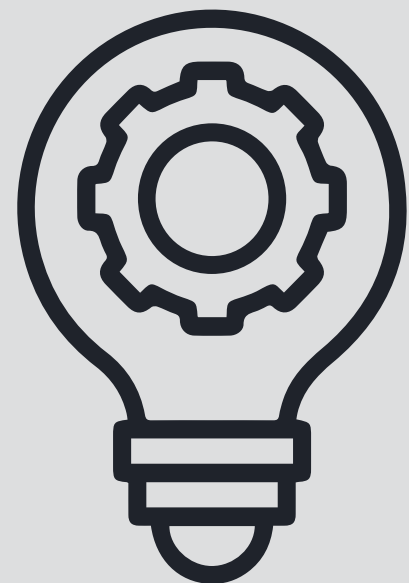
4k
employed

85+
zip codes



THE PROBLEM

To achieve financial success the system strategy is to create a world-class medical group that is built on efficiency, productivity, and service excellence. This required increasing volumes. Despite solid marketing efforts, volumes remained stagnant. The organization attempted a home grown assessment but it lacked credibility with staff and providers, the data was vague and the growth of the system made it impossible to scale.



BAIRD'S RESEARCH SOLUTION

The organization engaged Baird Group to delve into the system's consumer-facing stress points – scheduling and contact centers – with a goal of providing data on the experience with the first phone call.

Baird Group implemented a three-phase research project to collect real-time caller experience data. Each phase included approximately 1,500 mystery shopper phone calls across the organization's medical practice locations.

OUR METHODOLOGY

Mystery Shoppers were recruited from communities surrounding each of the medical practice locations. Each caller was given a reason for calling their assigned location and instructed to inquire about appointment availability. Shoppers completed an in-depth research questionnaire to capture both quantitative and qualitative data to help understand the “why” behind the metrics.

Research sought to answer three critical questions:

1. How likely is the first-time caller to return to this facility and recommend it to others? Why or why not? What elements of the call are most closely correlated with likelihood of returning as a patient.
2. What is the wait time for appointments, and how is that wait perceived by potential new patients?
3. How did the caller's interaction with this organization make them feel throughout the call?

Medical practice managers were aware of the ongoing mystery shopping and given access to real-time data throughout the study. They were encouraged to log in frequently to view their practice results which built ownership. In addition to an online dashboard available 24/7, Baird provided a comprehensive analysis with recommendations at the end of each phase along with trends over time.

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GROUP  Transforming the
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Building loyalty.

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FINDINGS

Findings in the early phases revealed difficulty reaching live attendants, a lack of empathy and caring from attendants, and disappointing appointment access. The research also uncovered previously unknown and undocumented process issues in new-patient intake. The data provided actionable information for improvement and subsequent phases resulted in improvements in these areas.

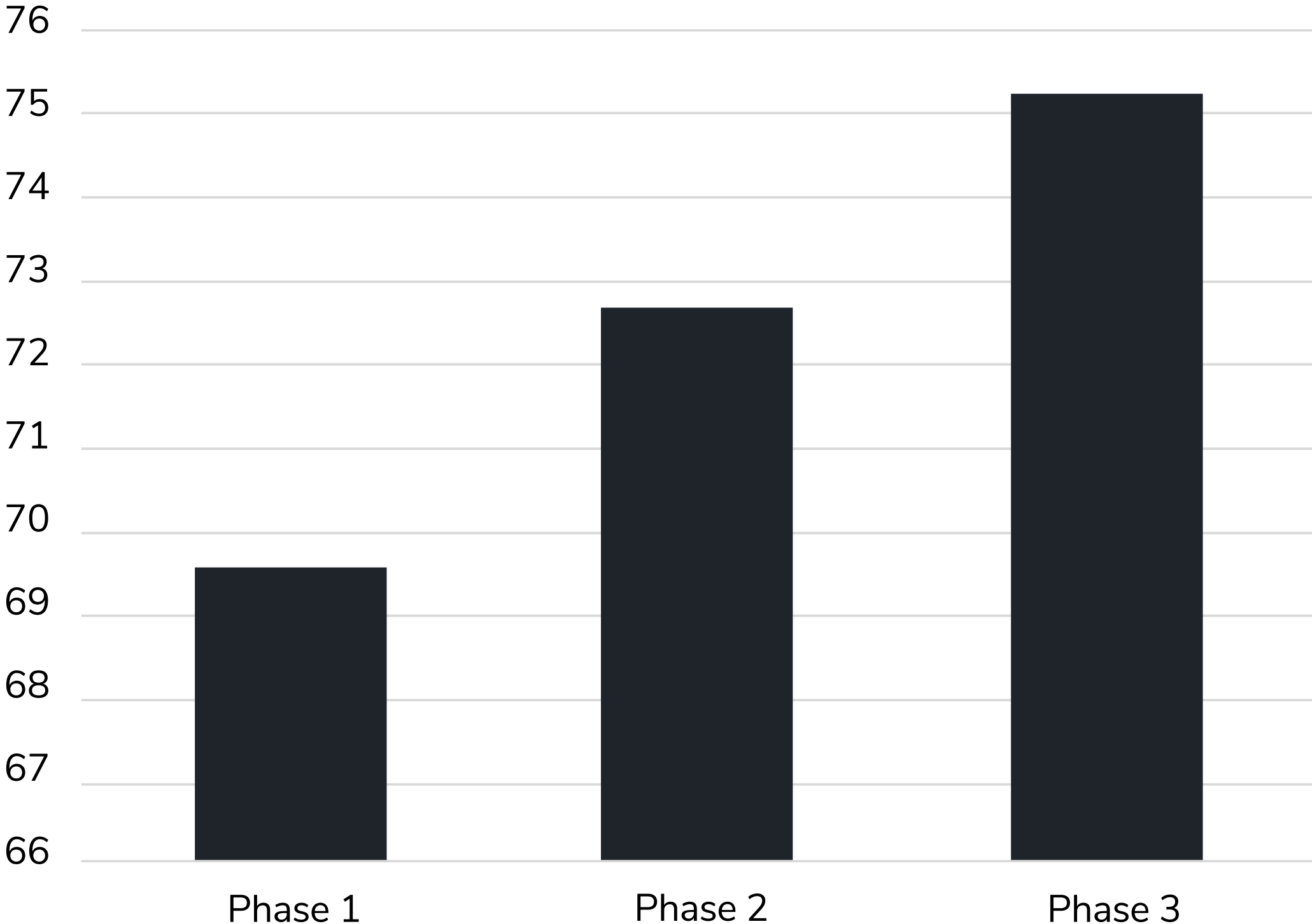


OUTCOMES

Baird Group's findings illustrated opportunities for improvement that had a direct impact on the callers decision to return to or recommend. The research gave organization leaders the concrete data and basis of proof they needed to justify resources for the following:

- Expand contact center resources: FTE reorganization and training
- Recruit new physicians due to patients' measured tolerance for appointment lag
- Let go of outdated scheduling templates
- Optimize appointment scheduling procedures

LIKELIHOOD TO RECOMMEND



OTHER KEY TAKEAWAYS

Staff recognizes that the phone experience is a priority

Managers engaged in real-time coaching

Physicians became more open to giving up templates

Contact us today to learn more.



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