Guide to a Memorable Customer Service Experience

Mark King
Practice Administrator
Tyson Eye of Cape Coral Eye Center
Cape Coral, Florida

Perception IS Reality!
How can we impact the patients perception in a positive way?
Some things we just cant avoid, but lets prepare them for what to expect. (You’ll feel some slight pressure).
Under promise and over deliver.

What is your customer service policy/plan?

"You ask, what is our policy? I can say: It is to wage war, by sea, land and air, with all our might and with all the strength that God can give us; to wage war against a monstrous tyranny, never surpassed in the dark, lamentable catalogue of human crime. That is our policy." —Winston Churchill

Our customer service plan is...
1. We start with hiring the right people
2. We train to our expectations
3. We inspect, what we expect
4. We reward positive behavior and counsel underperformers.
5. We give unhappy patients a forum to express their displeasure and we deal with issues head on.
6. We encourage happy patients to share their feelings and ask them to refer friends and family.

Getting started...
Define what your patients’ expectations are.
Customers minimum level of expectations?
1. Knowledgeable staff to answer phone
2. Safe environment
3. Clean facility
4. Friendly staff
5. Reasonable wait time
6. Good bedside manner from Doctor
7. Advanced technology utilized to maximize outcomes

Hiring the right people
• Involve Managers in the hiring process
• Have a multiple step interview process
  – Phone screen
  – Face to face
  – Observation and second interview
• Ask the right questions

The Interview
• Behavior/Competency based questioning
• Questions based on the competencies you are looking for in the candidate.
• Require specific answers, not vague generalities
• STAR method
  – Situation: a recent challenge and situation in which you found yourself
  – Task: What did you have to achieve?
  – Action: What did you do?
  – Result: What was the outcome of your actions?

Example questions
• Tell me about a specific time when you delivered outstanding customer service?
• Describe the most difficult customer you have ever dealt with. What was the situation, how did you handle it, what was the outcome?
• Give me a specific example of how your excellent service helped the companies growth and/or profits?

Example questions
• Describe a specific situation when you were criticized by a patient or customer. How did you react? What was the outcome?
• Describe your least favorite work environment? Why was it your least favorite? What would you have changed about it?
• Describe your favorite supervisor? How did they manage you?

The person sitting in front of you is looking and acting as good as you will ever see them look and act. Don’t think it will ever get any better!
Tips:
• Don’t look for the positives, look for the negatives.
• Get a second opinion
• Be careful of the “Halo Effect”. An observer’s overall impression of a person influences the observer's feelings and thoughts about that person's character.
• Always hire a 10!
• Trust your gut

“Customers do not become completely satisfied by accident. It’s a deliberate process that requires continuous commitment, frequent training, constant monitoring, and financial consequences for those who don’t measure up.”

*Exceeding Customer Expectations, page 85

Training to expectations
• Clearly define expectations
• Utilize talk tracks whenever possible
• Have a training plan and “chunk it out”. Manager should sign off on completed sections verifying competency.

Employee Development Plan
• Step by step training plan starting with day 1 on the job.

Telephone Mystery Shopping Results
Prepared for:
TYSON EYE OF CAPE CORAL EYE CENTER
December 31, 2013

Results compared to a national data base
**Positive**

Share positive results publicly among staff and in staff newsletter

---

**Digital Format**

- Online surveys are the most efficient and easiest to track results on demand
- The survey available from our practice website homepage for patients to take any time
- Email invitations sent through Constant Contact email service to patients. Best practice is to send emails daily for patients seen that day.
- Survey can be done by provider or visit location
- Results are tallied and benchmarked automatically

---

**The Survey**

- Survey consists of 13 questions where patients can rate the categories in questions from one to five. One equals short of expectations, and five exceeding them.
- The patient can fill in the doctor with whom they visited, as well as the location. A special internal code is added to the survey batch to verify the information.
- A space is also provided for additional comments and if the patient would like to be contacted directly about any outstanding issue or concern

---

**Counseling Negative Behavior**

Documented feedback in personnel file.

---

**Paper Format**

- Use practice management software to determine who the surveys will be mailed out to - we use the last 50 visits of each MD/OD for every month
- Surveys are mailed out with a cover letter explaining the purpose of the enclosed
- A pre-addressed stamped return envelope is included for patients to return the survey
- Surveys can also be handed out during the check out process for patients to take home and fill out
- Allow up to six weeks for surveys to come back with a return rate of at least 25%
Comments
- Comments are printed out for review.
- If a patient would like to be contacted, they are contacted by the Practice Administrator.

Root Cause Analysis
Problem Statement: You are on your way home from work and your car stops in the middle of the road.
1. Why did your car stop?
   - Because it ran out of gas.
2. Why did it run out of gas?
   - Because I didn’t buy any gas on my way to work.
3. Why didn’t you buy any gas this morning?
   - Because I didn’t have any money.
4. Why didn’t you have any money?
   - Because I lost it all last night in a poker game.
5. Why did you lose your money in last night’s poker game?
   - Because I’m not very good at “bluffing” when I don’t have a good hand.

Access Results
Tally your results to see where you stand
Once the surveys are returned, the results are tallied in an Excel spreadsheet by doctor and location. This way you can also see the effectiveness of staff combinations at different locations.

The results are also averaged out by the total practice number to provide overall assessment.

The Results
- The results are tallied by the score the patients give for each question. Once all scores are tallied, it is transferred by the spreadsheet to a snapshot as illustrated below to compare against a national database.
  - If you have multiple providers, it’s a good idea to have a batch for each location. This will allow you to assess the nuances of each location’s customer service and look for differences.
  - The spreadsheet populates a practice wide total snapshot for comparison to the national database.
  - The snapshot also provides specific results to every question in the survey so different areas can be targeted for improvement.

Implement Change
Share the Results
- Customer Service Committee is comprised of CEO/Surgeon, Chief of Optometry, Practice Administrator, Office Manager, Clinic member, Surgery Member, and Optician.
  - Meet once per month to review results
  - Each member holds their department members accountable
  - Praise positive results publicly
  - Coach negative results in private
Use in Practice Communications

- Positive results can help the perception of the practice with Managed Care plans and also marketing efforts.

Implement Change

Implement Action Plan

- With information and input from doctors and management staff, a recommended plan of action to address areas of concern from patients can be developed and implemented.

Implement Change

Monitor Change

- With the action plan implemented, conduct follow-up patient satisfaction surveys to see that your plan is working. Make sure the staff is aware of the importance of good customer service.

Implement Change

Handle Unhappy Patients:

Use the ASAP method!

Apoloize
Sympathize
Accept responsibility
Prepare to help

Happy Patients

Happy patients are requested to complete written testimonials.
Happy surgery patients complete video testimonials.

Happy Patients

At check out, happy patients are given a thank you card and invited to complete a survey online.
The Cycle of Service

1. Chart goes up from Check-In
2. Tech takes chart within 10 minutes
3. Log into Clipboard (tech productively numbers)
4. Call Patient back with a smile
5. Introduce yourself, including your name and title
6. Explain the procedures you will perform
7. Autorefract, Neutralize glasses RX (if needed)
8. Escort to exam room – clean equipment in front of Patient
9. Set up Phoropter power
10. Take Patient’s History
11. Check visual acuity
12. Check pupils, EOMs, CVF
13. Refract (separate charge – get permission first)
14. Check angles
15. Tonometry
16. Dilate eyes
17. Perform hearing test and record on green form
18. Write prescription and take to Optical
19. Return to Exam Room
20. Inform Patient about other services
21. Clean Exam Room again
22. Alert Doctor that Patient is ready
23. More testing if requested by Doctor
24. Walk Patient to Check-Out
25. Thank them for choosing Tyson Eye – provide Doctor’s card

Congratulations! You’ve completed the circle. Onto the next patient.
“Given the significant changes and pressure in the healthcare environment, we have undertaken a review of our network and are making changes to its composition. As a result, UnitedHealthcare is amending your Agreement referenced above to discontinue your participation in the Medicare Advantage network effective January 1, 2014.”

Now what?

We began contacting UHC/MA patients by phone in late September in advance of the appeal result.

The results?

The bad:

“We’re upset, but what can be done?”

“I hope you stay on the plan because we would hate to have to switch Doctors.”

“We have been with UHC for a long time and we like them.”

The good:

“It’s terrible of them.”

“It’s frustrating.”

“We already switched to BC/BS so we could stay with Dr. Tyson.”

“I’m outraged! Planning on meeting with an UHC advisor.”
The results?

- **22%** of Patients contacted were staying with United and not switching providers.
- **68%** of Patients contacted said they would switch insurance providers or pay out of network fees to stay with us.
- **10%** of Patients contacted were indifferent

Why Customers Leave

1. percent die
2. percent move away
3. percent develop other relationships
4. percent leave for competitive reasons
5. percent are dissatisfied with product or outcome
6. 68 percent go elsewhere because of the poor way they were treated by employees of the company/practice.

How much does a new patient cost?

- 26,000 (no of patients per year)
- \* .20 (no of new patients to the practice)
- \[= 5,200 \]
- \[5,200 \] (no of new patients to the practice)
- \* .28 (72% word of mouth referrals, 28% remaining referrals)
- \[= 1,456 \]
- \$350,000 (Annual Marketing Budget)
- \+ 1,456 patients
- \[= \$240.38 \]/cost per new patient

How much does an unhappy patient cost?

- \$240.38/cost per new patient
- An unhappy patient will tell 8-10 people about their experience.
- \$240.38 \* 8
- \[= \$1,923.04 \]/unhappy patient

“Take care of your customers and employees first, and growth and profits will follow.”

-Jack Taylor, Founder of Enterprise Rent-A-Car