

## Be Your Own "Undercover Boss"

### The Importance of "Mystery Shopping" Your Medical Practice

By ERIN SOMERS

CBS has a hit with the TV series "Undercover Boss," and if you have watched this program, you understand its appeal. If you haven't, I suggest you check it out. Two ideas come to mind when I think about this program and why it's so successful.

First, it's a feel good show. We witness firsthand a company's president or CEO digging in to perform various jobs inside their company, all done "undercover" of course. By the end of the show each of them experiences a much greater understanding of how their company is being run at all levels. *This is priceless information for any company leader.*

Second, I think of the courage that these bosses have in allowing their entire experience to be videotaped and later broadcast for all to see, from the good to the downright ugly.

In the business world we call this process "Mystery Shopping." On the TV show, these bosses do the *ultimate* mystery shopping of their own companies and it pays off big time. Having you personally go undercover in your own practice would be impossible, however your practice could still benefit greatly by being mystery shopped.

I often mystery shop medical practices and I have witnessed many different levels (*and lapses*) of customer service.

The process starts when I pick up the phone to schedule an appointment and ends when I leave their office. In between, there is a lot to be seen and heard.

Your patient's experience begins with scheduling and too many times I have had rude schedulers who rush the call, exhibited no warmth, or did not bother to direct me to the practice's website to download the new patient forms. One scheduler never asked me to spell my name, so her entry in the computer was incorrect and I was called the wrong name during most of my appointment.

I have encountered receptionists who put up that ever annoying "invisible wall," and ignored me as I stood patiently at the desk (this invisible wall is a *major* problem at many practices). I've seen employees who appear to be lounging at the front desk and I have yet to figure out exactly what their job was. One of my favorites was a gastrointestinal group who had patients in the lobby fasting for procedures as the front desk team enjoyed snacks!

There are lapses in customer service from the medical assistants as well. A *lack* of good communication skills is a major negative and can be downright dangerous for patients. I've had MAs call me into the back area and proceed to walk six paces *in front* of me. I have

also experienced MAs who took my vital signs and prepped me for the doctor *without* ever looking at me. During one visit, a medical assistant brought me into the exam room and the paper sheet on the exam table was dirty from the previous patient. One memorable MA took me to the scale to get weighed and *then left*. Yup, she left me standing on the scale and she just disappeared.

Check-out teams can have their issues too. My worst experience was when I was paying and the check-out woman took my money *without* ever looking me in the eye or even saying thank you. She came across as very rude and uninterested even though my payment was helping to pay her salary!

Mystery shopping encompasses the *entire* patient experience including the cleanliness of the practice. Being in a dirty doctor's office is the same as eating in a dirty restaurant; both are gross and will ultimately drive customers away. I have seen trash in the lobby that could have easily been picked up by staff. I once found a patient's medical paper work in the magazine rack with all their personal info including name, social security number, address, etc. What an invitation for identity theft (and "hello" HIPPA!).

Patient retention is essential to your practice and you need to know that your entire team is performing their jobs at

their best with warmth and professionalism. Mystery shopping is the most effective way to help with this evaluation.

I like to think of mystery shopping this way; we get a yearly physical exam to maintain our bodies at their best and to find potential problems before they become major issues. Mystery shopping can do the same for your practice.

While there are times when "ignorance is bliss," knowing how your team is doing when they *think* no one is watching, isn't one of those times.

So I ask you, do you have the courage to be an "Undercover Boss?"

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