



# ***HOW CAN I HELP YOU?*** **CREATING AN AWESOME PATIENT EXPERIENCE EVERY TIME**

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# TODAY'S OBJECTIVES

**1-What is customer service and why does it matter?**

**2-What is your role in the patient experience?**

**3- Skills and behaviors of customer service experts**

**4-How to respond to a dissatisfied patient**

*Sample scripts and more!*

# CONCEPT #1 – WHAT IS CUSTOMER SERVICE AND WHY DOES IT MATTER?



Customer service is a series of activities that directly effects a patient's experience with our practice

**What we say and do MATTERS**





HEALTHCARE IS  
CHANGING TO BE  
MORE PATIENT-  
FOCUSED

PATIENTS HAVE A  
CHOICE ABOUT THE  
CARE THEY RECEIVE

The goal is to treat the WHOLE patient  
– body, mind, spirit

***Want to know a remarkable side-effect  
of providing an exceptional patient  
experience?***

Happy patients create a more positive  
work experience for providers and staff



# Your role and the level of service you deliver makes a lasting impression

## MOMENT OF TRUTH

### Whenever You:

- Greet Patients
- Register Patients
- Respond to Patient Questions
- Collect Money
- Answer Telephones
- Schedule Appointments
- Take Messages
- Maintain the reception area
- Communicate delays

# CONCEPT #2 -WHAT IS YOUR ROLE IN THE PATIENT EXPERIENCE?



# What is the **Patient Experience**?

**Patient experience** encompasses the range of interactions that patients have with the health care system, including their care from health plans, and from doctors, nurses, and staff in hospitals, physician practices, and other health care facilities



## **Patient experiences set the expectation of patient care.**

You may have the most highly skilled and top-tier educated physicians and nurses on your staff, but if you can't provide a high-quality experience for your patients on a consistent basis, they won't recognize you for being an organization that delivers outstanding healthcare.

The patient experience begins BEFORE the patient's visit



- Phone call
- Website
- Portal



DO YOU KNOW WHAT TO DO AND  
HOW TO DO IT TO CREATE AN  
EXCEPTIONAL PATIENT EXPERIENCE?



# STRIVE TO

- Reduce barriers – Make scheduling and building access easy
- Be efficient – Have all information immediately available such as payer plans and provider bios. Continually improve access to providers and resources to match patient scheduling needs and requests. Ensure patient-facing resources are accurate on your portal. Make online scheduling easy and accurate.
- Explain – Provide timely updates if delays occur. Be upfront about patient financial obligations. Ensure patient-facing documents are current, neat, easy to understand

- Anticipate – Be empathetic. Ask patients about their needs via surveys and conversations. Personalize care to the patient's needs. Continually review wait-times. Observe other team members and provide feedback to one another.
- Follow standards, policies and procedures to create consistency
- Exceed expectations
- Follow through – Ensure patients have what they need after the visit such as accurate and timely referrals, complete after visits summaries, timely refills and other orders



DO YOU KNOW WHY YOU DO  
WHAT YOU DO?

- What is your organization's MISSION?
- What are your organization's VALUES?
- How does **your work** serve those goals?



# CONCEPT #3 -SKILLS AND BEHAVIORS OF CUSTOMER SERVICE EXPERTS



# Customer Service Experts Consistently Demonstrate

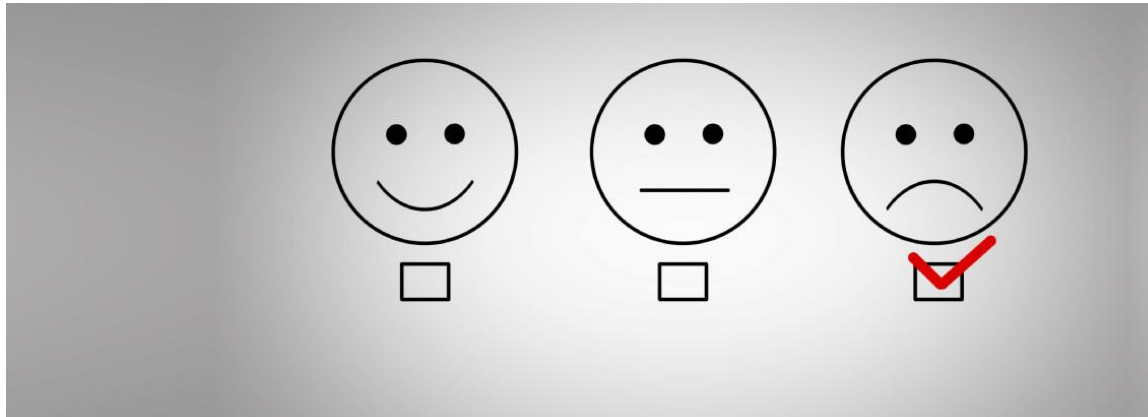
- A positive attitude and affirmative language – Smile when speaking, even on the phone, tell patients what you CAN do to help them or solve their concern
- Attentiveness and Active Listening – Repeat the patient's concern or request, ask for clarification when needed, stay focused on the caller or the patient in front of you, take notes if needed, slow down and focus
- Empathy – Use words like *“I Understand, I Appreciate, That Must Be Hard”*



- Integrity – Doing the right thing, even when no one is watching, think about the final outcome of your behaviors
- Patience– Allow others to express their frustration, count to 10 before responding, breathe, focus on your role in resolving the concern
- Resourcefulness – Stay curious, learn constantly, research solutions. Share your knowledge.

- Responsibility – Own what is yours and direct things to others as needed. Use language like, “is there anything else I can do to help you today?”
- Promptness – Keep patients focused if needed and be aware of time when taking calls and checking in patients. Communicate delays when necessary.

# CONCEPT #4 –HOW TO RESPOND TO A DISSATISFIED PATIENT



# Service Recovery

It is the action a service provider takes in response to service failure.

It is a company's resolution of a problem from a dissatisfied customer, converting them into a loyal customer.

# When it comes to service recovery, there are three rules to keep in mind:

1. Do it right the first time
2. Fix it properly if it ever fails
3. Remember: There are no third chances

Berry L. Discovering the soul of service: The nine drivers of sustainable business success. New York: Free Press; 1999.

# INTERVENE

1. *Apologize/acknowledge*
2. *Listen, empathize, and ask open questions*
3. *Fix the problem quickly and fairly*
4. *Offer atonement*
5. *Follow up*
6. *Remember your promises*



# What is the Value of a Service Recovery culture?

- It empowers employees to take quick and decisive action when something has gone wrong.
- It turns potentially disastrous Moments that Matter (any instance when a customer comes into contact with the organization and an impression is formed) into positive experiences.
- It creates a learning culture, wherein identifying/resolving complaints is a positive strategy and a springboard for performance improvement.

- It can be used to identify and correct problems before a customer encounters them and to improve service before a patient is discharged.
- It is a vital communication tool for listening and learning, then changing course.
- It curbs bad public relations: dissatisfied customers/patients have a tendency to tell others about their bad experience. This erodes trust in the organization and the caregivers.
- It reduces legal risk to the organization.



# ESPECIALLY FOR SUPERVISORS

*Staff need to have the authority to make decisions about handling complaints autonomously so they can act quickly.*

- Clarity about the extent of their authority to act on complaints without getting approval from managers.

- Defined courses of actions for most frequent complaints.

- Minimal red tape.

- A clear system of resource people, clear authority lines, and backup systems for dealing with difficult situations or those with financial, legal, or ethical implications.

# ADDITIONAL REMINDERS



- Remember this is **not** the patient's best day
- Demonstrate empathy, understand and manage your own emotions, take notes and share with others later as appropriate in order to learn and improve
- When a policy needs to be followed, remember **Clear Is Kind**
- Explain what you can do to help. Give options.

*Response to concerns or complaints is highly correlated to a patient's likelihood of recommending the practice to a friend and to reducing reputational and legal risk to the organization*

# MORE REAL TOOLS YOU CAN USE TODAY







# AIDET

- ☐ Acknowledge the patient, Address them respectfully
- ☐ Introduce yourself and others – give a brief overview to build confidence and trust
- ☐ Duration – how long will this take, how long is wait time
- ☐ Explanation – what tests are they taking, what happens next, what will be billed
- ☐ Thank You – demonstrate true appreciation



# YOUR COLLEAGUES ARE YOUR CUSTOMERS, TOO!

- ❖ Encourage candid communication and teamwork by getting to know your co-workers as people
- ❖ Help your teammates get or stay engaged in their work – notice levels of engagement - Highly Engaged, Engaged, Disengaged
- ❖ Clinicians are typically high achievers, visionaries, taught to question, competitive, confident, and data-driven. Communicate with and serve them in ways that align with their work and personal styles



# SAMPLE SCRIPTS

DON'T say:	Instead, DO say:
I don't know.	That's a good question. Let me check and find out. <i>Or</i> I don't have the answer right now. I will get back to you within the next 15 minutes. Will that be acceptable? I am sorry for the inconvenience. What is your telephone number?
We can't do that.	That's a great question. Let's see what we can do. <i>(Then find an alternative solution.)</i>
No one can help you.	I'm sorry, but no one in our business office is available right now. Would you like to leave a message on the voice mail <i>[if available]</i> , or may I take a message for you?
No one can help you.	I'm sorry, but no one in our business office is available right now. Would you like to leave a message on the voice mail <i>[if available]</i> , or may I take a message for you?
No...	We will be able to have the results by noon tomorrow. Where can we reach you?



# SAMPLE SCRIPTS

DON'T say:	Instead, DO say:
Who is this?	May I have your name, please? <i>or</i> With whom am I speaking?
Hang on.	May I please put you on hold?
Please hold.	May I please put you on hold? <i>(Then wait for a response.)</i>
Transferring you now...	Thank you for calling. I would like to transfer you to someone in our Referrals Department who can assist you. In case our connection is lost, here is the direct telephone number of the Department: <i>[insert telephone number]</i> . It's a pleasure to transfer you now.
What's your name? What's your date of birth?	May I have your name, please? May I have your date of birth in order to verify our records?
Who's your doctor?	In order to best serve you, could you please tell me the name of your physician?



# SAMPLE SCRIPTS<sup>37</sup>

## **Closing for all callers:**

“Is there anything else I can assist you with?”

If the caller responds “no,” use one of the following closings, depending on the relationship:

## **If caller is the patient, say:**

“Thank you for choosing Dermatology Associates for your medical care.”

## **If caller is the patient’s parent, say:**

“Thank you for choosing Dermatology Associates for your child’s medical care.” [Replace “your child’s” with the appropriate relationship, or simply use the patient’s name.]

## **If the caller is not a patient, say:**

“Thank you for calling Dermatology Associates.”



# SAMPLE SCRIPTS<sup>38</sup>

## Script for Describing Necessary Forms and Signatures

### Example:

This is our Financial Policy and Consent For Treatment form.

It describes in detail how the financial portion of your visit will be handled including billing your insurance company and collection of any remaining balances if they become your responsibility.

It also gives us consent to bill your insurance carrier for services received today and consent to provide you with the medical treatment you are seeking.

Do you have any questions after reviewing the form?





Take  
away

Yes	No	Unknown	
			<b>Answering time.</b> Are telephones consistently answered on or before the third ring?
			<b>Greeting.</b> Is an appropriate and consistent greeting offered to all callers?
			<b>Identification.</b> Does the receptionist identify the practice and him- or herself?
			<b>Query.</b> Does the receptionist ask each caller how he or she can help them?
			<b>Tone.</b> Is the receptionist's tone of voice pleasant?
			<b>Personalization.</b> Does the receptionist use the caller's title and last name (for example, Mr. Jones or Mrs. Smith) whenever possible in the conversation?
			<b>Recording.</b> Does the receptionist record the information using a standard message-taking paper or electronic form?
			<b>Clarity.</b> Does the receptionist ask questions to ensure he or she understands the caller's question and verify with the caller by repeating or asking appropriate questions?
			<b>Expectations.</b> Are callers told when to expect a return call?
			<b>Completion.</b> Does the receptionist wait until the caller puts down the receiver?
			<b>Comprehensiveness.</b> Are complete messages taken consistently?
			<b>Additional information.</b> Does the receptionist gather other information needed to accompany the message (such as the patient's account number; pharmacy telephone number; etc.)?
			<b>Accountability.</b> Are messages initialed to identify who took them and are they delivered soon after being taken?
			<b>Delivered.</b> Are messages delivered to the appropriate party according to practice expectations?

# PHONE CALL ASSESSMENT



Take  
away

# CHECKLIST FOR SUPERVISORS

- ☐ Are front office staff aware of what is expected of them?
- ☐ Do you have a position description for each job title?
- ☐ Do you have department policies and protocols in writing?
- ☐ Are front office staff at all clinical sites following the exact same department policies and protocols?
- ☐ Are front office staff schedules posted weekly, bi-weekly, or monthly?
- ☐ Who coordinates and approves front office staff leave?
- ☐ Are front office staff praised for positive performance?
- ☐ Are front office staff provided routine feedback regarding job performance and proficiency?
- ☐ Do you have a rewards and recognition program for your front office staff?
- ☐ Is job performance and proficiency, as well as patient service, monitored for all front office staff members regularly?
- ☐ Are front office staff roles and responsibilities clearly defined?
- ☐ Do all front office staff members know who their supervisor is?
- ☐ Do you have regular front office staff meetings?



- ☐ Are all front office staff members oriented to the practice and their specific roles?
- ☐ Is there a written document and checklist for orientation?
- ☐ What is the training program for front office staff by position?
- ☐ Are front office staff members cross-trained to other roles within their scope?
- ☐ Do front office staff members understand how to effectively utilize the practice management system?
- ☐ Do front office staff members understand how to effectively utilize the telephone system?
- ☐ Do front office staff members dress professionally?
- ☐ Do you have a front office staff counseling and disciplinary action process?
- ☐ Who is responsible for front office staff schedules, to include ensuring coverage for time off?
- ☐ Are front office staff work hours conducive to office hours?
- ☐ Do you monitor front office staff overtime? What actions do you take to reduce it?
- ☐ Does the front office staff treat patients with respect and care at all times?
- ☐ Do you have a process for recruitment and interviewing?
- ☐ Are front office staff turnover rates monitored?
- ☐ Is there a pathway for front office staff to move upward?
- ☐ Do you encourage front office staff development and continuing education?
- ☐ Is teamwork in the front office promoted and encouraged?
- ☐ Are front office staff members provided with all of the tools and resources they need to perform their jobs?



## COMPLAINT MANAGEMENT BEST PRACTICES

Complaint Management Process Step	Actions to Take
1. Encourage use of complaints as a QI tool	<ul style="list-style-type: none"><li>• Let your staff know that complaints are valued and essential for QI.</li><li>• Display complaints in public areas to reinforce the value you place on them.</li><li>• Make it easy for customers and staff to complain.</li></ul>
2. Establish a team of people to respond to complaints	<ul style="list-style-type: none"><li>• Include in the team people from the front lines as well as senior management.</li><li>• Use this team to develop planned protocols for service recovery for your most common service failures.</li></ul>
3. Resolve customer problems quickly and effectively	<ul style="list-style-type: none"><li>• Commit the organization to resolving complaints quickly to avoid the waste of repeated contacts.</li><li>• Train and empower frontline employees to resolve problems and give them the authority to fix problems on the spot.</li></ul>
4. Develop a complaint database	<ul style="list-style-type: none"><li>• Develop a computerized database that catalogs complaints by CAHPS composite or question.</li><li>• Use the database to identify trends and generate regular reports to staff and management.</li></ul>
5. Commit to identifying failure points in the system	<ul style="list-style-type: none"><li>• Using complaint data, identify failure points that are root causes of low satisfaction.</li><li>• Be proactive, not reactive; try to anticipate negative situations from occurring in the first place.</li></ul>
6. Track trends and use information to improve service processes	<ul style="list-style-type: none"><li>• Stop handling problems one at a time as if they have never occurred before.</li></ul>

Adapted from Bendall-Lyon D, Powers TL. The role of complaint management in the service recovery process. *Jt Comm J Qual Improv* 2001 May;27(5):278-86.



# REFLECT

Do you have a better understanding of your role in the Patient Experience?

Have you learned any new tools or behaviors that will help you deliver an awesome patient experience with every interaction?

# Thank You

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