

Is It Time for Your Practice to Conduct a Mystery Patient Survey



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While secret shoppers have long been a method of gleaning customer feedback in the retail world, the notion of using an anonymous “mystery patient” in a medical practice is certainly less common. However, since secret shoppers provide an opportunity for an objective, customer-focused evaluation, they can be an asset for your practice.

In general, mystery patients can provide an objective vantage point for analyzing both the success stories and opportunities within a practice. This can be as simple as searching your practice online, and giving you feedback about that process, as well as your web presence. Or, they can dial your practice to gauge the number of rings, your receptionist’s phone manner, the efficiency of the interaction, and the quality of the voice response menu, if applicable.

To take this notion further, consider the following tips for integrating mystery patients to evaluate and enhance your practice:

- **Determine your objectives.** Do you want to focus on your wait times? Communications efforts? Pre-appointment outreach? Before you take the next step, it is critical to determine what information you want to gather and how you plan to use it. When you determine the areas on which you want to focus, your mystery shoppers can home in on those services and interactions.

- **Start with scheduling.** Access and communication are key attributes to a successful practice. Either hire a consultant or use a reliable friend or family member to call your practice once or twice a day for about two weeks; make sure you cover all the available time slots (8 to 9 a.m., 9 to 10 a.m., etc.) from open to close. You can create various scenarios (see a sample scenario below), and the mystery patient can share his/her experience over the course of time. If this initial interaction isn't reliably positive, you know you have some work to do. Naturally, you will need to cancel any appointments that are set during mystery patient interactions.
- **Consult with the pros.** There are also a variety of marketing firms and experts who can help you perform a more professional evaluation of your practice. They are skilled in coaching mystery patients and will have surveys and questionnaires available for meaningful review. If you want a deeper dive, consider hiring a firm to take this evaluation to the next level.

If your practice simply is not comfortable with mystery patients, or prefers other methods of evaluation, potential opportunities include developing and sharing an automated post-visit survey for patients (keep it short and simple) as well as following up with patients who transfer their records to another practice of your specialty in your geographical area. All in all, the most important thing is that you are taking the time to evaluate – and then acting on the results.

Mystery patients can show you how patients are truly treated, offering effective feedback. Ensure that your practice is ready to put that constructive criticism into action by updating services and systems. Regardless of how you collect feedback, you can share your results with your patients – let them know how you have improved your practice. For example, you can offer a display (electronic or paper) in your reception area that features anonymous feedback as well as any initiatives which have developed in response. This simple action can make patients feel that they are listened to and valued.

When employed thoughtfully, mystery patients can offer a wealth of wisdom and unbiased first-hand knowledge about what your patients see, hear, and experience.

Sample Scenario:

For a simple scenario, engage a mystery patient to call your practice using this script:

“My mother, who has Medicare, is moving to town in a few months. She would like to establish care with Dr. Y. Can you tell me a little about him?” [Wait for response.] “Is he taking new patients?” [Wait for response.] If so, then follow: “Approximately how long in advance would I need to call to get her appointment?”

In addition to evaluating the responses, the mystery patient should give you feedback about the opening and closing, as well as the ease of locating your telephone number – and how long it took for the telephone to be answered.

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