

What Do You Get When You Cross a First Cousin and a Customer?

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Creating excellence in patient service begins with a keen understanding of what constitutes patient service and the level of service provided by your practice. Building a culture of service involves implementing and practicing a set of policies designed around patient expectations. This article gives an overview of ideal patient service and how to implement it your practice.

KEY WORDS: Customer service; satisfaction; expectations; trust; survey.

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Patients are a cross between a first cousin and a customer. They want to be treated like family while expecting excellent service. This dynamic is unique to medical practices because the office environment is more intimate than other medical settings. Patient expectations are different when they visit your office than when they visit the hospital. They anticipate the hospital to be impersonal, but in your office they are “family” and expect to be treated as such.

AQ1 A recent study showed that 80% of firms believed they were delivering outstanding service while only 8% of customers considered the service they received superior. A practice is not a company in the typical sense, but there is no rationale that would assert this grim statistic does not apply to a medical practice. This discrepancy indicates a significant failure to understand patient needs and the processes necessary to deliver outstanding patient service.

Like a good family, your patients will be quick to remember their worst experience and just as quick to forget the best.

It is easy to lose touch with the processes that drive an office because the focus is on meeting the immediate needs of the patients, staff, and service providers. The time pressures on doctors is enormous but a time investment dedicated to improving patient service will pay off by reducing stress and eliminating problems. Like a good family, your patients will be quick to remember their worst experience and just as quick to forget the best. Improving their

memories hinges on reducing the frequency and severity of service problems—billing errors, insurance nightmares, appointment confusion, waiting room drama, and all the other general office escapades they did not talk about in medical school.

Effective patient service process improvement begins by understanding the relationship from the perspective of the patients, employees, and service providers. Process improvement fails because changes do not transform the relationship between patients and your practice. Trust and loyalty are earned when the staff is perceptive, responsive, accountable, responsible, and consistent. These qualities must be built into your processes if you have an expectation they will be consistently implemented.

This article will explain the constituent elements of outstanding patient service and propose a simple strategy that can be implemented in your office. Simplicity is essential because rigid processes are the fountainhead of poor patient service. Your staff members are crucial to creating a patient service culture because they are intimately involved in all the relationships created by the practice. Service is often lost to what seems urgent in the moment, but in reality these episodes are usually impatience masquerading as importance.

CUSTOMER EXPECTATIONS

Patients, staff, and service providers have expectations about interpersonal interactions that involve your practice. Patients want to feel special, demand to be treated with dignity in a timely and efficient manner, and hope their questions are answered and suffering minimized. Most patients have similar expectations that allow you to develop processes that anticipate the needs of patients. Extreme

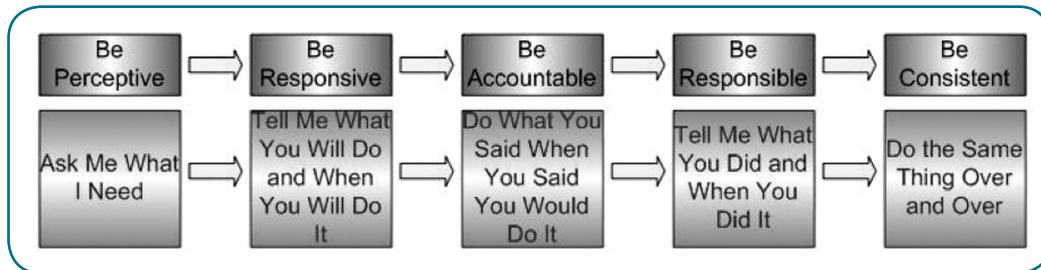


Figure 1. Ideal depiction of patient/customer expectation. Ekmekci O. The role of frontline employees in building sustainable customer service. *SAM Advanced Management Journal*. 2009;74(4):11-26.

demands and difficult patients are obstacles to effective processes because we attempt to create systems that will capture these unusual circumstances.

Unusual circumstances should not be allowed to control office procedure nor become a burden to the efficiency of the staff. Novel situations will always arise, and they should be handled expeditiously. Keeping a log of these experiences can be fun and informative, providing a method to spot negative trends. Difficult relationships must be managed and should never be allowed to impede the normal functioning of the office, and when necessary some relationships need to end for the benefit of everyone. From time to time, patients, like family, need to be reminded to play nice.

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AQ2 An ideal depiction of patient expectations and how those expectations translate into reality is shown in Figure 1. Most people have simple requirements, and exceeding expectations is consistently achievable when processes are designed to meet those expectations. Processes should be simply designed, easy to explain, and focused on the patient. Patients, service providers, and other medical professionals have an expectation of service from your practice; if your staff always reacts the same way, everyone will always be treated well.

Physicians do not like to think of patients as customers, but customer service can be a compelling metaphor for describing the service relationship among all the people who interact in a medical office. The relationship between the patients and the practice is unlike any other service relationship, but it nonetheless captures all the elements of service expectations. Patients will feel a greater injustice from poor customer service received at your practice, and they will react out of proportion to the problem but consonant with their feelings of injustice.

Patients have customer expectations of you and the staff. Staff members have customer expectations. And service providers are customers of your staff while at the

same time extending customer service to your practice. Ideally, each person in the practice will approach each interpersonal interaction with a mind to offer that person exceptional service. Service excellence is easily overwhelmed when staff loses perspective while attempting to manage the stress of conflicting priorities. Culture can be an excellent antidote to managing the stress of conflicting priorities.

Using a customer service metaphor helps establish a culture of service excellence capable of meeting the needs of your patients— just like they would treat your mom. Extending great service is a mindset, and you can create processes that reinforce that mindset so that your staff can become a model of excellence in patient service. Acknowledgment and transparency are essential to excellence in patient service. The great news for your practice is that this level of service has little or no cost, but offers unlimited rewards. The greatest reward is the trust that becomes embedded in all your practice's relationships.

BUILDING THE BASE OF TRUST

Patients that are over-rewarded return to the practice increased loyalty, referrals, commitment, and a willingness to pay. These rewards are predicated on the perceived value created by offering service excellence. Trust can be built when policies and procedures are implemented that encourage the staff to anticipate problems before they arise. Trust is violated unintentionally because what is routine for the staff is unique to the patients—staff needs to be reminded to experience the office from the patients' perspective.

The patient/customer expectations depicted in Figure 1 capture the steps involved in the typical interaction between your office and a patient. Successfully implementing each step depends on thoughtful communication. Routine can either be the enemy or friend of excellence depending on the policies you implement. Policies and procedure must be supported with initial and ongoing training to remind staff of the patient service imperative of creating an atmosphere of trust.

Recruiting employees who focus on service excellence can allow the practice to take a giant leap toward offering that level of service. It is recommended that candidates be

screened based on cognitive ability tests to measure perceptual abilities and interpersonal communication skills. These measures tend to have excellent validity and are inexpensive to obtain and administer. This can be supplemented with measures designed to evaluate conscientiousness; these assessments are not definitive but are useful in offering additional perspective on potential candidates. It is essential to hire employees who can manage complexity without over-reacting.

Implementing a process approach encourages you to abandon unstructured interviews as the primary mode of candidate selection. Creating a structured interview will allow you to more competently evaluate candidates and their assertions. Hiring employees who will model service excellence will allow the balance of the staff to more easily assess your expectations of all employees. Employees should be offered a model of performance they can aspire to emulate.

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The most vital policy initiative is to create a culture where relationships are valued and meeting the needs of others is seen as critical. To support the service culture, new employees should be explicitly socialized into the values of the practice. Asking current staff to co-create an orientation program to implement a socialization process vests the employees in the process. This policy initiative should extend beyond a one-off orientation and be reinforced through an ongoing program of process improvement. Office “lunch & learns” can be a great forum to reinforce the socialization program.

To further encourage the service culture, communication should be grounded in a desire to serve. How we say something can often be more important than what we say. For instance, one service-oriented company uses a morning huddle before the office opens, and they agree which “happy word” will be used that day. While seemingly silly, it has the effect of reminding the employees daily of the service culture.

Creating a service culture demands a more rigorous approach to hiring. A process to match an employee’s competencies to a job description needs to be implemented. There are numerous third-party vendors available that offer testing that will give insight into the specific skills and attitudes possessed by a job candidate. This may seem like an involved process, but as the office changes to a service culture it will become a desirable place to work attracting the best candidates. Offering superior service is good for the health of your employees—they will feel better and live longer.

THE FIRST STEP

The first step in your attempt to implement a service culture begins by assessing the service orientation of the practice. Conducting a service audit can be achieved in myriad ways but two simple techniques are direct observation and a 360-degree review. Direct observation can be accomplished by inviting someone in to spend several days or more in the office—observing.

Whenever someone observes the behavior of another person, the person being observed behaves differently. To work around this obstacle, a longer period of observation will challenge the ability of those being observed to offer mock behavior. The normal stresses and the stress of pretending will create a noticeable tempest exposing the ruse of the pretenders. The longer the period of observation the more likely it will yield meaningful responses.

The 360-degree review surveys employees, patients, vendors, and practice partners—everybody with whom the practice has a relationship. The review is a sampling intended to give you a complete picture of how people view your practice. The review will offer insight into the degree to which your assumptions about your practice are inconsistent with the view of people who have a relationship with your practice.

This step is essential because you need accurate and honest information to create a platform of meaningful change. Most change initiatives fail because they fail to address the fundamental driver of behavior in the organization. The office culture is the primary driver of behavior and the key to implementing meaningful change initiatives. You cannot cure the disease with an inaccurate diagnosis.

This process should be simple and anonymous to encourage honest feedback. Honesty is a gift—survey respondents must be explicitly encouraged to offer genuine feedback. Before asking for honest feedback, it is essential that you prepare yourself for news that might disturb you. It is just as hard to accept honest feedback as it is to give honest feedback, and you have to learn how to accept feedback nondefensively.

An abbreviated sample survey is shown in Figure 2. How you ask a question will often determine the response. These questions are designed to be neutral to encourage a spontaneous and honest response. It is essential to avoid asking specific questions because the responses can mask information critical to your change initiatives. Open-ended questions are more difficult to analyze and take longer to digest, but they offer you the greatest insight into how your office is perceived.

YOUR STAFF IS KEY TO IMPROVEMENT

A service culture is created through deliberate policy initiatives focused through the lens of patient expectations.

Request for Help—Survey

The point of this survey is to help us improve our relationships. Your kindness in taking a few moments to complete these questions is a gift to help us be better. If you could make every attempt to tell us how you really feel we would be honored to receive your honest and unfiltered feedback. Thank you for your gift—we appreciate your effort.

Will you share a story with us about a time you interacted with our practice? Take as much space as you need and be as detailed as possible. You can tell us an adventure tale, a horror story, or love story but try to offer enough detail so we can understand what you are describing.

Would you kindly name two things that make you apprehensive about calling or coming to the office? There is no right answer; there is only your answer, and we appreciate your willingness to share.

Can you tell us about the best service you ever received from a doctor's office? And the worst? Are we generally closer to the best or the worst?

Can you tell us about the best service you ever received anywhere? And the worst? Is your typical service experience closer to the best or worst service you received?

If you could change one thing about the practice, what would it be? Why?

If you could add one thing to the practice, what would it be? Why?

Can you describe the culture of the office in your own words?

What else should you tell us?

Figure 2. Sample of a survey.

Existing staff will play a vital role in the success at transformative efforts, and it is essential to establish a benchmark against which to measure progress. The responses to a simple set of statements (Figure 3) give tremendous insight into how employees perceive the availability of resources, the extent to which they feel engaged, and whether they feel valued.

This process is new for most offices that do not do formal written reviews, and it will create stress for employees as they try to determine your motives for change. You cannot

leave employees to fester in their frustrating attempts to assess your intentions. Be transparent, share what you are trying to do and why you are doing it, ask your employees to participate. Employee participation is critical if you expect your efforts to implement a service culture to prevail.

Creating a service culture will take time, and enlisting your employees as compatriots will enable the transformation to proceed.

Encouraging employees to offer honest responses will be a challenge. Employees are economically motivated to tell you what you want to hear, and it can be very difficult to assess who is not being truthful. It may make sense for you to complete the same survey and share that with the employees. It is important that this be done one-on-one to encourage employees to reciprocate. You will need to make a decision if you or your office manager is in the best position to obtain meaningful feedback.

Creating a service culture will take time, and enlisting your employees as compatriots will enable the transformation to proceed. Each employee can offer the practice value when he or she is encouraged to embrace the service culture. This is not an effort for all to feel good for an afternoon, but an attempt to create an environment where everyone thrives through improved physical and mental health.

PRESCRIPTION FOR IMPROVED CUSTOMER SERVICE

Reaping the benefits of a great patient service begins with a keen understanding of the level of service offered by your practice. It is important to understand what patients expect and how they will evaluate the performance of your practice. Excellent service is not difficult to provide, but it is very difficult to provide excellent service consistently. The only way to overcome this challenge is to create a service culture.

A service culture is not about saying yes; it is about implementing a process to manage and meet customer expectations.


A service culture depends on implementing a constellation of policies that encourage staff to reach for excellence in patient service consistently. This is a process that is simple in theory and complex in practice because it requires a commitment to consistency that will be constantly challenged by what seems urgent in the moment. A service

Probe	Response	Explanation
I clearly understand what is expected of me.		
In order to meet job performance expectations, the proper materials and equipment are available.		
My job gives me the opportunity to do my best every day.		
My efforts are recognized and appreciated.		
Someone in the office cares about me.		
My development matters, and someone in the office helps me develop.		
My opinions seem to count.		
I understand and contribute to achieving the mission of the practice.		
The people I work with understand and contribute to the mission of the practice.		
My manager consistently models service excellence.		
In the last three months, my performance and development have been talked about.		
In the past six months, I have had opportunities to learn and grow.		

Figure 3. Employee satisfaction instrument.

culture is not about saying yes; it is about implementing a process to manage and meet customer expectations.

AQ3 Your practice will be judged based on the worst experiences of your patients. Attempts at change offer you the opportunity to enjoy incremental improvements in patient service by eliminating minimizing the downside of service. You cannot change all at once—it requires time and commitment on your part and the sincere effort of your staff. It

is important to remember that the best health arises from full compliance with your prescription. 

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Author Queries

AQ1: Author: Please supply a source for this study.

AQ2: Author: Do you have permission to reprint figure 1? How was it adapted?

AQ3: Author: Please correct “eliminating minimizing.” Also, please clarify “the downside of service.”

AQ4: Author: Are these references or just suggested readings? If the former, they need to be cited with footnote numbers in the text.