



Customer Service & Harnessing the Power of Meaningful Patient Feedback

July 2020

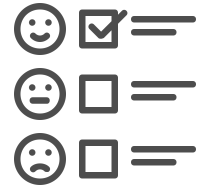
Magali De Castro
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Customer Service in General Practice

This session will cover:

- How a patient's customer service experience affects satisfaction levels, word-of-mouth referrals and health outcomes
- Practice strategies to support all team members in delivering exceptional customer service
- Dealing with aggressive or difficult patient behaviours in a safe and caring way
- The best times and methods to collect and use patient feedback for meaningful service improvement

The Experience of Customer Service



Let's take a moment to **reflect on a recent customer service experience**

(Could be outside of healthcare: retail, food, utility company, etc)

- Would you qualify it as a **positive or negative** experience? ... neither/indifferent?
- **Which parts of the interaction** affected your experience the most?
- Was this in the **start, middle, or end** of the interaction? ... or was it **what happened or didn't happen after** the interaction?
- **Did it change or shape the way you see that service** or provider?
- **What does it mean for the future** of you using that service/provider?
(eg. Use again, recommend it, warn others, sabotage it, etc.)

What do we mean by Customer Service?

Most, if not all, *direct and indirect interactions* your patients have with your practice could be considered part of customer service.

Any one of these elements has the potential to *reassure, surprise, delight, frustrate* or even *outrage* patients.

This affects their overall experience of your service and how they see you going forward.



Customer Service 'touch points'

Elements that affect your patient's experience and satisfaction with your services:

- **Ease of finding and communicating** with the practice: in person, via phone or online, after hours, etc.
- Your **online presence**: website and business profile on Google
- Practice **facilities**: how clean, tidy, and current
- Team **phone etiquette**
- Team **in-person etiquette**
- The **arrival experience**
- The **waiting room experience**
- How the team **deals with unexpected situations** and problems (e.g. service recovery)
- How well you **communicate and keep patients informed**
- How well the team **listens and genuinely cares** about patients
- How reliable is the team at **following up and following through**



It's mostly common sense, isn't it?



Customer Service in a healthcare setting is particularly tricky because *we're dealing with people during a very vulnerable time*

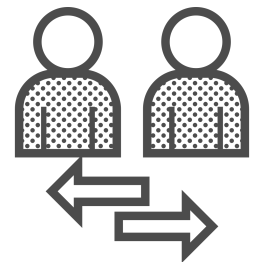
When patients engage with a health service, they are *often feeling unwell, scared, frustrated, stressed* or even *resentful or angry* (feeling a sense of injustice or 'why me?')

It doesn't take much for those *emotions to intensify and turn into a negative experience* at or with the practice

Benefits of Great Customer Service

It takes time and effort, but the rewards are powerful

- A positive experience for patients and the practice team
- Repeat attendance when needed and more 'loyal' patients
- Word of mouth referrals and recommendations to friends and relatives
- Patients are more likely to take up additional services, both in-practice and referred to external providers
- Patients may be more forgiving if things go wrong or mistakes are made at some point
- Better patient adherence to treatment plans



What patients expect

When we need to access a health service, we expect a smooth experience, including:



- Find a quick and convenient way to reach the practice
- Check *if* an appointment is needed, and find a suitable time
- Be welcomed on arrival and instructed where to wait (for what is hopefully a short amount of time) and given updates if there are delays
- Be seen by a competent clinician who truly listens in order to fully understand the patient's problem or concern
- Be given clear information about the health issue and a competent medical opinion about what to do about it
- Be given options for next steps in plain, patient-friendly language
- Know what to expect after the appointment and what the follow up process is for results or if things change/get worse

Seems straightforward. So what's the problem?

Unfortunately, many challenges can get in the way:

- The team may be **overworked, under-resourced and time-poor**
- **Lack of training or no established customer service processes** means **everyone has to improvise** or 'think on their feet' with every new scenario. This is **stressful** for staff who may not be sure if they're doing the right thing
- **Paperwork requirements can distract** from quality interactions and from giving patients your full attention
- **Delays, tech issues and unforeseen events can and do happen.** Having an **agreed process or guidelines** on how we manage and communicate during such an event is a huge help
- The practice may not have a **consistent way to measure how it's doing in terms of customer service** until a formal **complaint** or an unprompted **compliment highlights that element**



Key Customer Service areas



Your Online Presence

When most patients try to contact the practice, the first place they will check for your contact details is online

- Check that **your 'Google My Business' listing** is up to date. This is what most people will click on to call or check basic details like your phone, opening hours and website
- **Have your own practice website**
 - Should be **easy to navigate**, easy to **find contact information**, **opening hours** and your **'online booking' link** if you have one (and you should!)
 - **If you need patients to call** for certain types of appointment or if you're not taking on any new patients, **make sure this is clear on your website** to avoid wasting patient and staff time
 - Your contact details like **phone number, address, and online booking link should be available from every page** of your website (e.g. Make it part of the footer, header or sidebar)

Key Customer Service areas

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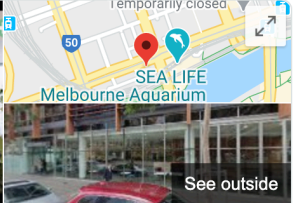
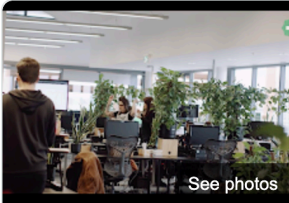
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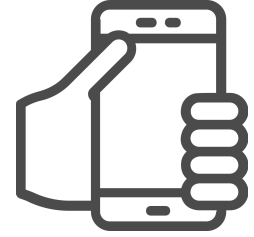
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Key Customer Service areas



Phone etiquette

- **Welcoming greeting.** Not too long, but should be **consistent** across staff members. e.g. (Name of practice), this is (first name), how can I help you?
- **Check if the call is an emergency before putting people on hold** e.g. (Name of practice), this is (first name), are you calling about an emergency or may I put you on hold for a moment?
- What's the **tone** of the conversation, are you **paying attention** and does it sound like you **care about the patient's needs** right now?
- **Use 3 patient identifiers** (e.g. Name, date of birth, address) before doing things like opening a patient record, booking an appointment, taking down a message or connecting the call to someone else
- Give **clear directions and available options**
- **Confirm appointment details or next steps** before saying goodbye
- **Say goodbye** and have a consistent sign-off (e.g. Thank you for your call)

Key Customer Service areas



The reception experience

- The **practice facilities** e.g. Is it easy to find, visibly clean, tidy, does it feel current or tired and dated?
- **Quick access to staff** on arrival and, where available, **clear guidance to self check-in kiosk or how to check in via mobile**
- **Acknowledge patient's presence** on arrival, even if busy. e.g. Make eye contact and say 'Hi, I'll be with you in one moment. You may also use the arrival kiosk here to my left, if you prefer.'
- **Make patients feel welcomed** on arrival (genuine, friendly tone and demeanour)
- **Set expectations on waiting times and direct to practice facilities for waiting** (eg. There are 2 patients in front of you. Please take a seat in the waiting room and the doctor will be with you shortly)
- Offer a **comfortable waiting room** environment: Comfortable seating, low noise, ways for patients to entertain themselves while they wait.

Key Customer Service areas

Clinician approach & attitude. Patients want:



- A welcoming and **friendly tone and demeanour**
- To **feel listened to** and get a sense their **clinician genuinely cares** about finding the issue and the best solution
- To be given **clear information and advice** based on the clinician's assessment and their expert, clinical opinion
- To be given **some background and information** about **what the findings mean or what would need to be done** to confirm or rule out a concerning diagnosis
- To get clear **options for next steps**
- To be given clear **directions of what happens next** and what patients need to do
- To **know** what **the follow up plan or timeline** is for the issue to be resolved
- **What to do if there's an issue** or if something else comes up in the meantime

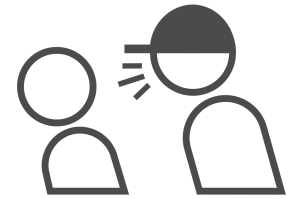
Customer Service grievances

Most common patient complaints:



- **Rude or disinterested** reception or clinical staff
- Being **left on hold too long**
- Being **left in waiting room too long** and **not knowing about delays or how many people in front of them**
- **Feeling rushed** either on the phone, at reception, or during the consult
- **Feeling like the practice doesn't care** about you. 'You're just another Medicare number'
- Getting **poor or no information about their condition**, what it means and what happens next or what different tests are for: often leads to Dr Google in search for answers
- **No follow up** after the consult. Having to **hope and assume everything must be fine** if there's radio silence after a visit

Dealing with Aggressive or Difficult Behaviours



Where these behaviours come from:

People may be **under the influence** of drugs, alcohol or other substances

They might be a generally **violent/hostile** person
(Make sure you have a clear zero tolerance policy and that staff know how to get help if in danger)

However, **most of the time**, aggression is often caused by an **issue that is handled poorly**. This leads to **emotions escalating** and **resulting in an uncomfortable or even dangerous situation**

With the right **skills and strategies**, escalation can be prevented and managed

Dealing with Aggressive or Difficult Behaviours

Situations can escalate to a difficult or even dangerous point when patients:

- Don't feel they are **being listened to**
- Don't feel **understood**
- Don't feel **taken seriously**
- Feel they are being **kept in the dark** about what's happening
- Feel **powerless** or **trapped** and **like they have no other option**
- Feel there's **more that staff could do to help, but they just don't care** enough to do it
- **Don't feel like their needs will be met unless they make it happen, no matter what**

Dealing with Aggressive or Difficult Behaviours

Practical tips for when things don't go to plan

It's important for staff to have a range of tools of things they can say or do in different situations:

Acknowledge their frustration and apologise:

"I'm sorry this is taking so long"

"I'm sorry to hear that"

"I understand this can be frustrating. We are trying to resolve this issue to make sure you can be seen/get the information you need as soon as possible"

Indicate next steps:

"This is what we can do for the moment while we resolve the issue"



Mirror back and re-frame the situation

Repeat their grievance in their own words to show that you acknowledge how they feel, that you take them seriously and will do something about it

For example, if they say *“Nobody in this place cares about me or my time!”*

You can reply with:

Apology: *“I’m sorry this is taking longer than expected.”*

Acknowledge feelings and reassure: *“I understand how it might feel that it’s because we don’t care about your time, but I can assure you the GPs are working as fast as they can and as fast as is safe for each patient they’re seeing.”*

Give more information: *“Unfortunately some of the problems that came in today have been more serious than expected and have taken longer to deal with.”*

Thank them for the behaviour you want: *“I appreciate your patience with this.”*

Clear next steps and timeline: *“If you give me 2 minutes, I will look into it and get you an update.”*

Offer options: *“You’re welcomed to take a seat while we resolve this or if you want to go for a walk I can ring your mobile when the GP is with their last patient”*



IN CONVERSATION



Host

Magali De Castro - Clinical Director, HotDoc

Managing the Impact of Verbal Abuse in a Clinical Setting

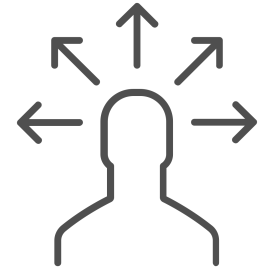


Special Guest

Kylie Zeal - Professional Certified Coach

Access from the facebook group:
facebook.com/groups/fortheloveofhealthcare

Establishing a practice culture of customer service excellence



- Recruit the right people and equip them to succeed
- It's about **respect and caring** for our patients
- **Culture and tone** is often set by the owners/management and staff tend to emulate this. **Treat the team as you want them to treat patients**
- **Empower staff with clear directions** on what they can or cannot do without manager or GP authorisation
- **Give them phrases they can use to buy themselves time** if they need to check on something

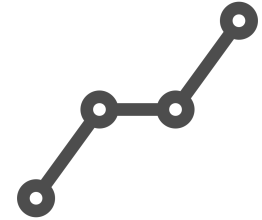
"I understand what you mean. I need to check with the practice manager/ GP about that one. Can you please hold a moment?"

"Can I give you a ring back with an answer in a few minutes once I've been able to check with the GP/Manager? What's your best contact number?"

"I'll check that for you now. Just take a seat and I'll come see you once I've spoken to the GP/Manager"

How well are you doing in the customer service front?

Are you measuring this?



Reactive ways to measure customer service:

- Waiting on patients to complain
- Waiting on patients to give you an unprompted compliment

Semi-proactive:

- Having a suggestions box in the waiting room
- Using Patient Feedback forms in preparation for accreditation

Fully Proactive:

Inviting patients all year round to give you feedback after their consultation (could be delivered via SMS, Email, iPad/Tablet at reception or paper form)

Note: This doesn't have to be every patient and every consult. Could be a random patient sample over the day and patients prompted only once every 3 months as they attend the practice.

Tracking Customer Service and Patient Satisfaction

Using a post-appointment feedback system

You could check for satisfaction with :

- Their overall experience
- The experience at reception/waiting room
- The experience with the clinical team
- Likelihood to recommend to friend or relative
- What they feel you could do differently to provide a better service



Aim to **provide your patients with a way to give you open-ended answers** and not just a rating or a happy/sad face.

Remember: Do NOT use patient feedback as reviews or testimonials!

All feedback should be anonymous and used for internal quality improvement processes, and not hand picked to promote the practice.



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