

Understanding the Patient Experience

by Michael Egan



Michael Egan

The summer 2013 issue of VEIN Magazine included the article, “The Power of Patient Perceptions: Monitoring and Managing Your Practice’s Reputation,” which provided a framework to help you understand the impact of patient perceptions on your practice and the importance

of managing your reputation. This framework revolved around the connection between the reality of your patients’ experiences with your practice, the perception of that experience by others, and how it affects business.

Now that you understand the importance of striving for positive patient perception, we want to provide you with a method for discovering the reality of how your patients experience your practice—a method that allows you to translate patient feedback into practical improvements that will keep your practice and your reputation going strong.

Why Understanding Real Patient Experience Is Important

Healthcare providers need to be business-minded people, as the true source of revenue lies in the patient base. Patients are given care and service that, ideally, improves their health and also provides patient satisfaction during their entire healthcare experience. It is the patient satisfaction component that can translate into positive—or negative—business outcomes for healthcare providers. Thinking of your practice from a business standpoint, you should consider that every patient walking into your office presents you with three potential sources of value:

1. The value associated with their current visit
2. The value associated with any subsequent visits they make to your office
3. The value they provide as patient referrals who recommend your practice to others

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In his 1996 national best-seller, *The Loyalty Effect*, author Fred Reichfeld made a very compelling argument for the powerful economic impact customer loyalty can have on your business (or practice). Reichfeld argues that turning happy customers (patients) into active promoters has an added value—they help sustain and grow your practice through both their individual contribution as return patients, as well as through their referrals of new patients.

Analytical reports on the results of patient satisfaction surveys recently appearing in *Forbes* and *The Wall Street Journal* confirm what you as a healthcare provider already know to be true: Your existing patients who are highly satisfied with your practice—from direct medical care to services that cover every level of the patient experience—are excellent sources of new referrals.

It isn't just value to your own practice that may be at stake. Recent reports also state that highly satisfied patients are more likely to be compliant patients who follow medical guidelines, which in turn improves their health outcomes. These are compelling reasons to discover whether your patients are satisfied with the services you provide. Are there areas of the patient experience that, if improved, might lead to greater value for your patients and your practice?

To Find Real Answers You Must Ask the Ultimate Question

In addition to writing *The Loyalty Effect*, Fred Reichfeld wrote a companion book, *The Ultimate Question*. The ultimate question of, "How likely are you to recommend this company [or practice] to a friend or colleague?" challenges outmoded customer satisfaction programs by positing that to find the real answer to how you are doing you have to ask your customers (patients) this question. Reichfeld proposed that the best way to ask them this question is to have them complete a survey.

Why a survey? A survey will give you truly unbiased views of all aspects of your practice (including you). Asking your patients direct questions through a survey helps you by:

1. Providing you with valuable, raw information about particular situations
2. Giving you statistically relevant insights from which you can ascertain what is the "true" patient experience

Implementing a Patient Survey: Four Key Steps

Step 1: Develop the Survey Questions

In addition to employing the ultimate question ("How likely are you to refer this practice to a friend or family member?"), you'll need to develop questions that help you discover the reasons behind why your practice is performing as it is, as well as what you can do to improve your patient services. To do this, develop questions that cover key components of the patient experience, such as:

- Making an appointment
- Office environment
- Waiting experience
- Interaction with staff (including the doctor)
- Follow up

For each of these areas, you'll want to construct questions that will furnish you with statistical data as well as engage the survey taker by offering him or her opportunity to provide comments and explain specific experiences. But keep the survey short, simple and safe, using the following guidelines:

- Use 10 questions or less
- Structure answers to keep the methodology very simple and consistent (don't use a five-point scale on one question and a 10-point scale on another)
- Use unbiased language—don't lead the respondent
- Pose one question at a time rather than compound questions to help you isolate the variables
- Allow for, but don't rely on, open-ended responses

Be consistent by settling on a set of survey questions and sticking with them over time, as there is tremendous value in statistically significant data.

Step 2: Distribute the Survey

Use best practice guidelines for delivering your survey.

When? Survey patients immediately following a visit, while their memory is fresh. You'll see a dramatic drop in response rate the longer you wait to distribute the survey following each visit.

Mode of distribution? The most efficient way to distribute a survey is via email. The more email addresses you gather, the better off you will be in the long run. Do you have a scheduling application that can take care of this for you? Use it. You can also use hardcopy mailers for your survey, but this mode can get expensive and typically has much lower response rates. Should you distribute a survey while the patient is still in the office? Maybe, if you can provide the individual with a way of submitting responses anonymously.

Who? Survey every patient who walks through your door. Don't discriminate against known bad experiences. Be honest. Be careful about over surveying, however. If a patient is returning regularly, make sure you're only gathering a response from them once over a 6–12 month period.

How to gather results? Make sure you have a tool that allows you to collect, store and report on your survey findings over time so the task isn't too burdensome for your staff.

Step 3: Analyze the Survey Results

Make sure you can gather data over a period of time. This not only gives you the ability to trend your data, but allows you to build statistically significant numbers to help you gain faith in what the data is stating. Use the base numbers and trends to get the overall picture, but don't forget the

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comments. Though not statistically significant in their own right, your patients' comments will often be the most valuable with respect to a clear identification of issues and potential solutions.

Step 4: Act on the Survey Results

Once you have gathered information from your patient surveys, you will have a much clearer idea of how you are doing in the eyes of your patients. This step is what it is all about—the “so what?” or “now what?” actions you can take based on the data. Your results should always lead to an actionable plan that you specifically develop to target areas that need improvement. Identify key goals, key action steps, who is responsible and when you expect to start seeing results. Align each action step with an associated improvement in specific survey question areas. By doing so, as you continue to survey your patients you should see a corresponding rise in scores for those areas you've been focusing on improving.

Additional Thoughts and Considerations about Surveys

Can you interview patients directly? Yes. If you have the time, speaking directly with patients can be extremely valuable. In traditional customer research you often have broader panel surveys that work alongside “focus groups” or more individually targeted interviews. These individual interviews allow you to really get behind the experience and reasons for why certain service aspects are important. However, since individual interviews are both time-consuming and produce potentially skewed results, it is best to pair them with broader surveys. It often works best to do interviews after you've collected a fair amount of survey responses so that you know where to focus the interview.

Should you incentivize patients to take a survey? Maybe. You'll be amazed at how willing people are to give feedback—you may find that you generate plenty of responses without ever offering an incentive. If you are having trouble getting people to respond, some form of small incentive can be useful; perhaps you can waive a copay fee or give a discount at their next visit.

Is a survey HIPAA-compliant? Yes, if you are careful. Make sure you are not asking for personally identifiable information along with very specific health-related questions. In fact, it may be safest not to ask any questions about the health aspects of a patient's visit. Remember, your questions should be focused around services, not health problems. Most responses will be anonymous in nature. However, if you are concerned about staying HIPAA-compliant, you can ask any vendor who helps you with your survey if they are willing to sign a Business Associate Agreement that ensures all information is gathered and processed securely and anonymously to keep patient information private.

Can you use survey results as marketing language for testimonials or reviews elsewhere on the Internet? Maybe. Laws differ by state as to whether or not you can use survey-sourced information for testimonials or other marketing materials (you cannot in Illinois, for instance). Make sure you check the laws in your state before you plaster your patients' glowing comments all over your website. That being said, once a patient has gone through the process of answering survey questions for you, asking them to proceed to Yelp or another online review site to continue their process is not extremely difficult. In this way, you can maximize the benefits of patient surveys.

The most critical step in improving business and managing your reputation is to understand the reality of how your patients experience your practice. The most direct and useful method for understanding this experience is asking for feedback from your patients via a standardized survey. Be sure to think through your survey from the four key aspects we have presented—developing the questions, distributing the survey, analyzing the results, and acting on those results—and you will be well on your way to translating the value of patient feedback into long-term reputation management, practice growth and sustainability. **V**

THE NET PROMOTER SCORE

Calibrating how you are doing with respect to patient satisfaction has always been a challenge. Even if you survey your patients regularly, it is often difficult to understand whether or not the overall situation is improving or deteriorating.

Probably the most effective single measurement in the satisfaction field today is the Net Promoter Score (NPS). This system of scoring was developed by Fred Reichfeld in the mid-1990s, and an entire structure for analyzing customer satisfaction has been built up around it.

The concept is simple. The NPS measures the difference between those patients who are active “promoters” of your practice versus those who are “detractors.” In order to gather this information, you will want to consistently ask the question, “How likely are you to recommend this practice to a friend or colleague?” Answer choices are built on a 0-10 scale with 0 being “not likely at all” and 10 being “extremely likely.”

If a respondent answers with a 9 or 10 score, they can be considered an active promoter of your practice. If a respondent answers with a 0-6 score, they are considered a detractor. Those answering with a 7 or 8 score are considered neutral.

% Promoters - % Detractors = Net Promoter Score

To calculate your Net Promoter Score at any given point in time, take the percentage of respondents who are promoters and subtract the percentage of respondents who are detractors. If your NPS is positive, you have more promoters than detractors and are doing fairly well. The higher your NPS, the better you are doing. The lower your NPS, the greater indication that you need to translate patient feedback into actionable steps that will improve your services and help your practice achieve growth and sustainability.

To learn more about the Net Promoter Score, visit:

www.netpromotersystem.com.

Or:

<http://www.netpromotersystem.com/about/measuring-your-net-promoter-score.aspx>

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