The Magic of Mystery Shopping

By Diane Peterson, FACHE, and Nancy Peacock Jensen - Edited by Terry Grundy

Ever wished you had a magic cloak of invisibility? Have you imagined flinging that cloak over your shoulders and walking the hallways of your organisation? Have you dreamt of seeing what your customer experiences firsthand?

You have a wealth of valuable data about your patients’ perceptions, courtesy of the reports you receive from patient satisfaction surveying. But perhaps you dream of just a little more — a little icing on the cake, if you will.

Wouldn’t a magic cloak of invisibility be handy to allow you to wander through your organisation unnoticed? Interesting thought, but not very doable.

There is a practical alternative, however — a time-honoured technique used in many industries. It’s called “mystery shopping,” and it is something you can do in your own organisation.

Definition:

Mystery shopping is a process through which professionals pose as customers to test the service they receive in your organisation. The result is a detailed snapshot from the customer point of view. While used by hotels, restaurants, airlines and other industries for years, mystery shopping in hospitals began within the past ten years, and has proven to be a very effective tool.

The Pros

There are both pros and cons when it comes to mystery shopping. The pro argument is that it provides an informed view of your organisation by a knowledgeable outsider. The mystery shopper tests many factors within the categories of access, behaviour, facilities and systems.

Because they understand processes and issues from both a provider and receiver viewpoint, they can provide an objective appraisal of the experiences of a customer as they progress through a complex system of care.

Some of the things you have taken for granted over the years become startlingly eyes of a customer. When employees hear the mystery shopper’s report, heads nod and they often hurry to fix problems. Survey results do not necessarily evoke similar enthusiasm.

...and the Cons

On the other hand, the mystery shopping report is a snapshot of one point in time. It does not cover all services, especially some of those behind the scenes.

It entails only external customers’ views — e.g., patient, visitor, caller, family member. It cannot assess the views of the internal customer — e.g.,...
doctor, employee, volunteer. Finally, it can be perceived by some as “spying,” so a policy or publication about the use of mystery shoppers may be warranted.

Where to Shop
The possibilities for mystery shopping are nearly endless.

- Acute care services
- Outpatients
- Doctor practices
- Mental health services
- Long-term care
- Rehabilitation
- Community Health
- Home health
- Information services
- Any location serving customers

What to Shop
Mystery shoppers should test all four areas of access, behaviour, facilities and systems.

1. **Access.** How easy is it to get to, and find your way around, your facility? Can you actually reach locations by only following existing signs? When you call, can you speak to a real live human being or must you navigate the interminable menu of automated choices? Are the hours of operation for services convenient for the majority of customer users?
   - How is lighting and security? Would you feel safe coming here at night? Is parking convenient or are the best spaces saved for doctors, clergy and others? What can be learned about your organisation by reading the Yellow Pages?

2. **Behaviour.** Does anyone seem to care that you are a customer of their organisation? Are you made to feel like an intelligent, adult human being? Or do you feel like a room number (“234, bed B”), a condition (“the gallbladder in 234”) or a procedure (“the chest X-ray in Room 2”)?
   - When you ask for something unusual, how is your request received? Do you get an automatic “That’s not my job” or an “I don’t know, but let me find someone who does?” Do the people you meet make eye contact, acknowledge your presence and ask if they can help? Are they wearing name tags that you can read?
   - As you walk through hallways, ride elevators and sit in waiting rooms, what do you hear? Is confidential information discussed in your presence? Is there a lot of griping and complaining going on among employees?
   - As an inpatient, is your privacy respected? Do caregivers acknowledge your pain, fear and lack of knowledge? Do they really listen to what you have to say? Do they explain what they are going to do before acting? How long does it take someone to answer your call button during shift change?

3. **Set Objectives.** Decide where you want to shop, what you want to measure, and how the results will be used.
4. **Choose the Type.** Decide what type of customer you want to be. Will it be as a telephone caller looking for information? Or as a visitor/family member entering the facility for the first time? Do you want to see what an outpatient sees or an inpatient?
5. **Make Arrangements.** If you plan either inpatient or outpatient assessments, you will need the cooperation of one member of your medical staff to write orders. You also need to find a shopper who can be a good observer, be demanding, be bias-free, be knowledgeable about health care and be a good actor!

4. **Then Shop.** The shopper needs direction as to the areas to shop and must record observations as often as possible to keep an accurate record.
3. **Facilities.** What’s the “ambiance” of the facility — is it a health care factory or a comfortable, inviting place to regain one’s health? If the restrooms on the first floor are dirty and littered, how clean can the ORs be? Once you get past the well-decorated lobby, what does the “back of the house” look like? How often are bed linens changed?

Are bathrooms stocked with real, cloth towels or are they available on request only? Are all of the electronics in a patient room functioning — e.g., television, call button, bed control? Is this a place you could feel comfortable spending time, if need be?

4. **Systems.** Are the systems established for providing care customer-friendly or are they set up for the caregiver’s convenience? Are you asked to sign forms, but not read them? Is printed information readily available? How amenable is the organisation to making exceptions to policies in unusual situations?

Is patient registration centralised or decentralised? Do departments coordinate their scheduling or is your Respiratory Therapy appointment canceled because you were down in Radiology and not in your room when the transporter came for you? How long does it take to get a response to a question or complaint?

### Making Use of Results

When the mystery shopper’s job is done and the report presented, it is time to decide how the findings will be used. The results must be presented in a positive manner. In any organisation, the shopper will find positive aspects that are as important to highlight as the negative ones.

1. **Confirm Findings.** Ride a wheelchair or gurney through the hallways staring at the ceiling or walls. Sit in a waiting room. Spend a night in a patient room. Wear a patient gown for a day! Mystery shop a competitor’s facility yourself.

2. **Celebrate Success.** Based on the findings, reward loudly in public (and correct quietly in private). Celebrate heroes often and in imaginative ways. Also celebrate innovative solutions.

3. **Fix Problems.** Fix obvious problems quickly and with fanfare. Encourage employees to seek solutions individually and within departments cooperatively.

4. **Follow Up.** Continuously monitor the correction process. Set high expectations — that good service is expected and poor service will not be tolerated. Plan on changing the culture by example, not by mandate.

### That Touch of Magic

That magic cloak of invisibility may not be available, but the next best thing — mystery shopping — is. It provides a valuable supplement to any survey’s quantitative data in assessing the customer service culture of your organisation. And a technique which motivates employees to deliver great customer service is truly magical.

Diane Peterson is president and Nancy Peacock Jensen is a senior consultant of D. Peterson & Associates, a health care consulting firm specialising in customer service management, strategic planning, and marketing. D. Peterson & Associates is a Press Ganey Quality Collaborator, working with clients to help better utilise patient satisfaction data. Diane and Nancy developed “Service Strategy: The Key to Quality,” a multi-faceted program for enhancing customer satisfaction that has been in constant use since 1987. They and their colleagues have conducted many hundreds of mystery shopping assignments.

### Also Available:

“Sample Mystery Shopper’s Report Card”

Contact a Press Ganey Representative at:

info@pressganey.com.au