




Intentional Customer Service

Building a Strong Foundation


BREAKTHROUGH


COACHING



What is Customer Service?

- Assisting patients
- Providing a service
 - Diagnosis & Explanation
 - Adjustments & Modalities
 - Products
 - Reassurance
- Customer service is your brand's chance to make an impression.





###

- CA presentation 2: **Customer Service in Healthcare matters Now More Than Ever**
- This insightful session lays out a step-by-step program for delivering the kind of customer service today's patient demands. Attend and you'll learn the core principles and innovative strategies that will help you raise the standard of customer service excellence in your practice by putting a new twist on patient communication.
- 2 hour 15 min

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Why is Customer Service So Important?

• Customers are looking for:

- More than talented doctors (although that is still important).
- They want a positive experience from the first contact with your office.
- They want to feel like you respect them and will treat them with care.



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Examples of Good Customer Service

• Examples:



Southwest Airlines



- In similar companies what can you do to differentiate form the competition?
 - All airlines are truly similar so what makes one better than the others?
- What did Southwest do?
 - They are upfront when they say they are intentionally setting up a good experience.
- Pricing is not the answer!

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Southwest's Strategy

- Southwest Airlines' business model is based on extremely efficient operations, low-cost pricing and innovative logistics solutions.
- Their strategy includes a deep focus on customer experience and looking ahead.
- None of this would be possible without a **motivated team of employees**.



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Customer Service in Healthcare

- Customer service is the top priority in most service-related industries.
- But it takes a backseat in the healthcare industry.
- However, it should be a higher priority for more than one reason:
 - Operational Efficiency
 - Patient Retention
 - Reviews



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Operational Efficiency

- **Happy patients are:**
 - Happier: easier to deal with.
 - Healthier: lower stress and higher comfort lead to faster and better health outcomes.
- Ultimately, that means running a more efficient and more successful practice.



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Patient Retention

- **Patients who are satisfied with their experience are less likely to:**
 - Switch doctors
 - Drop out of care
- **They will:**
 - Have higher rates of loyalty over the long term
 - Refer



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Reviews

Don't forget that patients can review any business, including yours!


- Good customer service means better reviews.
- Better reviews mean more patients in the future.



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Healthcare Service Post COVID


- Long lines
- Limiting number of appointments
- Weeks out to schedule
- Not going into appointments with minors
- Refusal to treat



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Good Customer Service is Essential

- Whether it's good or bad, your customers will remember, so it's essential to have **Intentional Customer Service**
- When patients feel they have been treated like a priority, satisfaction increases.
- If you combine great service outside the exam room with education and explanation of clinical decisions in the exam room, you are well on your way to satisfied patients.





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Intentional Customer Service

• If you are not **intentionally** setting a **Wow** customer experience, you may be **accidentally** setting a mediocre or **bad** experience.

Dictionary


in-tention-al
/in 'ten(t)SH(ə)n(ə)l/
adjective
done on purpose, deliberate.





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Steps for Customer Service fix this one with the outline

What can we do “on purpose” to create a wow experience?

1. Identify common complaints
2. Build your systems to prevent the complaint
3. Hire the right people
4. Train the staff
5. Set expectations & deliver
6. Create relationships
7. Be consistent
8. Reevaluate





Intentional Thinking

Identify Common Complaints

Intentional Thinking

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Build it Backwards

- **Reverse Engineering**
 - What is your end result?
 - How will you get there?
 - Where did others go wrong?

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Lessons From Disney

- Where did Disney get the idea?
- When he was in line at a terrible amusement park with his family.
- He decided he was miserable.
- He looked around and saw other miserable adults.
- He decided he would build something better.
- **He decided what the end result would be and then built it backwards**

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Change Your Perspective

What is important to patients?

What are common complaints in healthcare?

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Common Patient Complaints

1. Scheduling difficulties
2. Disagreements with staff
3. Feeling unheard
4. Not getting enough time with the doctor
5. Waiting too long
6. Confusion with insurance and billing
7. Unwelcoming environment

**Intentional Systems
Build Your Systems to
Prevent the Complaints**

Intentional Systems

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It's About Your Systems

Exceptional service is achievable for every organization because exceptional service is *architected* from systems and processes that you control.

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The Disney Difference


“The Disney difference is not only looking for a better or more efficient way of doing things; it is using creativity to improve, or as Walt said, ‘**plus up**,’ each experience.”



How can you **Plus Up** the experience?

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Problem: Scheduling Difficulties




Please arrive 30 min early for your appointment


- How quickly can you see a New Patient?
- Are your appointment times convenient?
- Are you running on time?
- Do you respect the patients time?

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Plus Up Solution: Intentional Schedule Building

- Create a system for efficient use of time & space.
- Use appointment templates.
- Create scheduling rules.
- Cluster book.
- Create New Patient spots.
- Senior friendly, student friendly, mom friendly times.
- Use technology to streamline the process:
 - Online portal
 - App
 - 2-way texting




Schedule Appointment

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Problem: Waiting Too Long

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Plus Up Solution: Intentional Time Management

If your wait is too long something is broken:

- Appointment times
- Number of appointments
- Number of staff
- Number of providers
- Types of appointments in certain times

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Problem: Disagreements with Staff

- Are you helpful?
- Do you seem annoyed or busy?
- Do you complain about annoying patients where others can hear you
- Are you focused on the patient in front of you?
- Are you in **present time conscious** (PTC)?
- Do you go above and beyond to get answers for patients?

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Plus Up Solution: Intentional Positive Interactions

- Focus on positive patient interactions
- What do you say when you are **not** talking?
- Many times misunderstanding happen when:
 - What you say...
 - What you meant to say...
 - What the patient heard...
 - Are they the same?

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Problem: Feeling Unheard

- Do you talk **more** than you listen?
- Do you let them answer before you ask a 2nd question?
- Do you talk over patients?
- Are you phrasing your response before they are done talking?
- Are judging them before they give all the details?
- Do you think you know what they are saying before they say it?

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Problem: Feeling Unheard

Listening is giving the other person the experience of being heard.

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Plus Up Solution: Intentional Listening



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Plus Up Solution Intentional Listening

- Actively listening builds trust.
- Trust then leads into them coming to you time and time again with other issues friends or family members.
- Actively listen get a sense of their feelings. Are they scared, uncomfortable, or uneasy?
- Give a nod or paraphrase what you hear them saying to demonstrate that you hear and understand them.
- The quality of your communication is one of the most basic signals you send about how much you value and respect your employees.
 - High-quality information enables and empowers.
 - Mediocre information can cause paralysis, improvisation, and disengagement.




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Problem: Not Enough Time With Doctor



- Are you hurried or distracted?
- Are you giving short responses?
- Are you present time conscious?
- Do all patients receive the same amount of attention?



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COACHING**Plus Up Solution: Intentional Attention**

- Give the same attention with 1st patient of the day as with the last.
- Don't let stress of the day go into the Treatment Room with you.
 - You might be rushed, you might be tired, or feel exhausted with your daily tasks, however, discipline yourself to create a good impression on your patients.
- Are they questioning you or asking questions?
- Be clear and concise.
- Be professional all the time



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- Be professional all the time
- You might be rushed, you might be tired, or feel exhausted with your daily tasks, however, discipline yourself to create a good impression on your patients.
- Take a deep breath and present your best professional self.
- Your great human behavior will make your customer feel satisfied and comfortable.



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- What is one of the most avoided topics that people hate to talk about?
 - Money
 - And also insurance
- Insurance is confusing and there are parts that patients just don't understand.
- Policies are written in a misleading manner.



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Plus Up Solution: Intentional Financial Consultations


- When you answer questions before they are questions patients are happier.
- Answer the question they thought they asked.
 - What Time is the 3:00 parade?
- **Strong Financial Consult:**
 - Good Faith Estimate
 - Payment Plans
 - CHUSA



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Problem: Unwelcoming Environment

- **Are you unintentionally asking your patients to go away?**
- Setting
- Parking, location, directions
- Phone procedures
- Distractions at check-in
- Distraction during treatment



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Plus Up Solution: Intentional Inviting Environment

Everything in the Office Speaks:

- Parking
- Lightening
- Comfortable chairs
- Comfortable tables
- Clean neat office
- Clean bathrooms
- Modern





Delivery Systems: Set Expectations & Deliver Intentional Delivery

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2 Types of Customer Service

• Proactive

- Before there is an issue
- Keep your promises.
- Deliver WOW service

• Reactive

- A problem has already occurred.
- Acknowledge the issue
- Resolve issue
- Prevent it from re occurring



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Deal with a Complaint

- Stay consistent in your tone
 - Thank you for your patience...
 - I understand ...
- Use the CARP Method
 - Control the situation
 - Acknowledge the dilemma
 - Refocus the conversation
 - Problem-solve
- Tell the truth & Be open with mistakes.
 - Forgot to call a patient back? Overbooked the clinic? Running a little late?
 - Be honest & apologize sincerely



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Listen and Act

- **Listen and act when your patients complain.**
- Deal with every complaint, as complaints can be opportunities to build a lifetime of loyalty from a patient.
 - Listen to the complaint
 - Check the validity
 - Take action to resolve it
 - Let the patient know how it was resolved
 - Look at the system what went wrong?



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Define Service Delivery Systems

- Intentionally deliver Good Customer Service through **Service Delivery Systems**
- A Service Delivery System is
 - The way an organization **delivers services** to internal or external customers.
 - Includes all of the **resources, processes, and activities** required to deliver a service to a customer.
 - **All systems** that work together as part of an organized process.
- Delivering a service and ultimately meets the expectations of customers.



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Define Expectations

- What is the definition of service in your practice?
- Make sure that you and your patient are on the same page regarding what to expect (or not expect) from your service offerings.
- This includes
 - What your services do and don't encompass
 - Eligibility
 - Potential limitations
 - Costs
 - How to get assistance when needed, and more.
- Set the expectation for day 1, day 2, acute care, wellness



BREAKTHROUGH
COACHING**Why are Expectations Important?**

- What do you expect at Chick-fila?
- What do you expect at Ritz Carlton?
- What do you expect at a Motel 6?



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COACHING**Exceed Expectations**




- Go above and beyond what your patients expect.
 - It is always better to over-deliver on expectations.
 - Make sure you are meeting your patients' needs, then make an effort to exceed them by paying close attention to every detail in the delivery of your services.





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COACHING**Why Focus on Delivery Systems**

- Service Delivery Systems impact on customer satisfaction.
- Customers also tend to be more satisfied
 - When their expectations are met.
 - They feel they are receiving a good level of service
- Leads to
 - Retention
 - Loyalty
 - New patient acquisition
- How do you know if your organization's SD system is effective?
 - Customer feedback is one of the best ways to uncover any flaws and make changes that will improve your level of customer satisfaction



BREAKTHROUGH COACHING Disney's Service Delivery Systems		
Cast Friendly staff in character	Setting Clean & beautiful appearance Holiday decorations Fresh paint	Processes Line management Crowd control
		

BREAKTHROUGH COACHING Defining Our Delivery Systems	
<ul style="list-style-type: none"> • What are our delivery systems? <ul style="list-style-type: none"> • Communication <ul style="list-style-type: none"> • Communicating with patients, soon to be patients or those we are attracting as patients • In Office Experiences <ul style="list-style-type: none"> • What happens when they walk in the door • Setting <ul style="list-style-type: none"> • Does our physical setting support our other delivery systems? 	

BREAKTHROUGH COACHING Delivery System: Communication	
<ul style="list-style-type: none"> • In office Communication – communication with current or soon to be patients <ul style="list-style-type: none"> • Person to person <ul style="list-style-type: none"> • Phone presence • Face to face • Visual communication <ul style="list-style-type: none"> • Internet • Text messages • Email message 	

BREAKTHROUGH COACHING Delivery System: Communication

- Out of office communication
 - Person to person
 - Networking
 - Reputation
 - Referrals
- Visual communication
 - Google
 - Marketing message



BREAKTHROUGH COACHING Delivery System: Communication With Patients

- Communication methods
 - Internet
 - Text
 - Phone
 - Email
 - In person
- Can patients find important information about your services online?
- Can they schedule appointments online?
- Make it as easy as possible to communicate with you.



BREAKTHROUGH COACHING Communicate Communicate Communicate

- Error on the Side of Communication
- There's no such thing as over-communication
- People feel more comfortable when they know what's going on.
- Information should be
 - Clear
 - Timely
 - Accurate
- The patient does not know what you're thinking?
- Communicate!



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- Personality is more important than knowledge
- Patients would rather speak to someone who is warm and friendly whose attitude is:
 "Would you mind holding a moment Jane is the best person to answer that question."
- In customer service: Attitude trumps knowledge.
 - Patient does not want to speak to someone who is unfriendly or disinterested even if they have all the answers
- How do you get your personality across the phone?
 - In one word: Smiling.
 - People can hear it in your voice when you're smiling, and they can hear it when you're not.



BREAKTHROUGH
COACHING**Improve Communication by Being Real**

- Be real
- Be personable
- Be casual
- Be friendly
- Don't use an overly formal tone.
- Don't be a robot.



BREAKTHROUGH
COACHING**Defining Our Delivery Systems**

- Office experiences
 - Office Visit Day 1
 - Office Visit Day 2
 - Daily office visit
 - Wellness care visit



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Service Delivery System Day 1 Procedure

- Service Delivery System: Day 1
- Be Sure the patient feels Welcome
- Make sure each of your employees is capable of making a good first impression
 - NP Phone
 - NP appts or registration internet
 - Welcome text
 - Intro video
 - Office paperwork
 - Exam
 - Treatment
 - Follow up text
- Be Sure the patient feels Welcome

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Service Delivery System Day 1 Procedure

- What to avoid on visit 1
- Long waits
- Feelings of uncertainty
- Short rushed visits

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Service Delivery System: Day 2 Procedure

- The ROF
- Provide the treatment plan information
 - Dx
 - Treatment Plan consistency and duration
 - Why
- Financial consult
- Follow up text
- Will patients know how much a procedure will cost? Be transparent about pricing.
- Does the patient know what will happen to them? Take time to explain procedures and what they can expect.

BREAKTHROUGH COACHING Service Delivery System: Day 2 Procedure

- What to avoid on visit 2
- Patients saying
 - "I don't know when the dr wants to see me"
 - "I can't do 3 times per week"
- Don't ask questions like
 - "When do you want to come in?"
 - "When does the doctor want to see you?"



BREAKTHROUGH COACHING Service Delivery System: Daily Office

- Services
- Patient Education
 - Be transparent in the plan
 - What you say on the 3's?
- Progress Exams with Mini ROF
 - Assess patient progress and explain
- Consistency
- It's almost like you are giving them a gift of health



BREAKTHROUGH COACHING Service Delivery System: Wellness

- There are two ways to grow a practice
 - NP
 - Wellness
- What you say on the 3's
- Assessing progress
- Consistency
- Keeping them through Wellness care
 - Feel that it is time
 - Reoccurring appts
 - Use the 1st Tuesday at 1pm
 - Not as needed or every 4 weeks



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Delivery System: Setting

- Everything speaks
 - Chairs
 - Tables
 - Paint
 - Bathrooms
 - Easy access
 - Kid friendly
- Disney World was created because an amusement park setting was saying the wrong thing!

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Creating Efficient Delivery Systems

- Goal **be effective and efficient** quote?
- To create effective Service Delivery systems to deliver services to patients in a timely and efficient manner.
- How
 - Resources
 - Training
 - Clearly defined roles & responsibilities
 - Accountability & ownership
- When everyone works together with clearly defined roles and responsibilities, this provides each individual with exactly what he or she needs to fulfill his or her part in delivering a service with optimal results.

Hire the Right People
 Intentional Hiring

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It's more important to hire people with the right qualities than with specific experience.


— J. Willard Marriott —



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Intentional Hiring


- Skills vs. Values
- Personality vs. Experience
- Work Ethic vs. Education
- Hire those who support your core values!
- Skills and tasks can be taught
- Things that cannot be taught
 - Work ethic
 - Honesty
 - Common Sense



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Build a Solid Foundation

- What defines your company culture?
- What kind of workplace do you hope to build?
- What traits do you value most in your employees?
- **Intentionally define your:**
 - Company Culture
 - Core Values
 - Mission
 - Vision



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Disney's Dream Culture






Core Values

Safety – Courtesy – Show – Efficiency

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Create an Intentional Common Purpose

Core values are attributes the company uses to build the foundation on which employees use to perform work, conduct themselves, and deliver services.

<p>TEAM WORK</p> <p>I WILL</p> <ul style="list-style-type: none"> Look for ways to help team members. Have a supportive spirit at all times. Teach & mentor. Collaborate for better results. 	<p>LOVING SERVICE</p> <p>I WILL</p> <ul style="list-style-type: none"> Have a patient-first mentality. Concentrate on the patient in front of me. Love All patients even those who are hard to love. 	<p>WOW CUSTOMER SERVICE</p> <p>I WILL</p> <ul style="list-style-type: none"> Be solution-focused. Always go the extra mile. Go above & beyond. Look for the WOW. 
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What is a Mission Statement?

- Is a short explanation of a business's overall purpose and why it exists.
- It explains the motivation behind who they serve and why they feel strongly about the solution they can provide.

Connect People to what's important in their lives through friendly, reliable, and low-cost air travel.

Southwest

Mission Statement

BREAKTHROUGH COACHING **What is a Vision Statement?**


- It is important to understand that a mission and vision statement are not the same.
- A vision statement describes a company's goals for the future.
- A mission statement describes its purpose in the present time.

To become the world's most loved, most flown, and most profitable airline.

Southwest
Vision Statement


BREAKTHROUGH COACHING **Foster Strong Culture**


- There is no other factor so instrumental to the success of a service organization as its culture.
- Employees should be aligned when it comes to a specific set of core values which is crucial to service delivery.
- Don't take it for granted that your culture is strictly internal — it shows up in your service delivery, your methodology, and your relationships and interactions with customers.
- More often than not, your customers will know if you and your employees aren't on the same page.



BREAKTHROUGH COACHING **What to Look For When Hiring**


- Personality
- Honesty
- Problem solving skills
- Teamwork mentality
- Those who exhibit qualities important to your practice






Train Your Team


Intentional Training



Intentional Training




Training is more critical to desired BEHAVIORS and outcomes than most companies have ever imagined.



Creating a United Culture


- Train your staff so that they know **exactly what to do** in each situation.
- Prepare them with knowledge and answers.
- Teach them to problem solve.
- Train, Train, Train and then train some more!



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Implement Your Training


- Use BTC tools provided:
 - Scripts
 - Forms
 - AVMS
 - Other staff
- Never say anything that makes you appear that you do not know what you are doing.




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A General Helping of Knowledge

- It's absolutely critical to know the ins and outs of you services
- It will give you a better context of the customer's problems and give you the confidence to answer questions





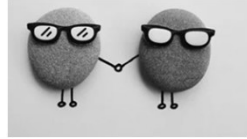
Create and Maintain Strong Relationships

Intentional Relationships

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Who Should you Create Relationships With

- Staff
 - Lunches
 - Parties
 - B days
- Patients
 - Do they feel like your friends
- Community
 - Networking
 - Connections in community



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Build a Relationship

- Focus on **building** a relationship rather than making a transaction.
- What is the most important aspect of any relationship?
 - Trust
 - It's essential to developing an atmosphere of caring and competent support.
- How do you build trust?
 - By consistently & courteously guiding your customer through every step of your interaction with them.



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Know Your Patients

- Ask about their kids
- Know what they do for work
- Ask about their vacation
- Know what is important to them
- This will help you to not only solidify a relationship with them but for you to create an Avatar or a profile of you ideal patient.



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Treat Everyone with Respect

- Courtesy is the #1 tool for WOW customer service
- How do you feel when someone lets you in the lane in front of them in traffic?
- How about when someone holds the door open for you?
- Probably pretty good. That's how every patient should feel after interacting with the practice.

Thank you for calling can I put you on hold for just minute?

Thank you very much for your patience

I'll be happy to help you


Please...

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Personal Interactions Matter

No matter how awesome you think your product is, or how skilled you think your team is, what your patients are most likely to remember is the direct interaction they have with your company.

Theses patient interactions leave a **lasting impression** on your patients.



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Create a Positive Emotion





Be Consistent Intentional Results

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Empathy Patience & Consistency

Practice Empathy, Patience, and Consistency

- Empathy the ability to understand and share the feeling of another.
- Patience the capacity to accept or tolerate
- Consistency conformity in the application of something
- Your patients might have a lot of questions, some are just chatty, others may be easily annoyed and some as just grouchy.
- You must be prepared to empathize with your patient and offer the same level of service every time.



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Empathy the Linchpin of Customer Service

- **Empathy:** the ability to understand and share the feelings of another.
- Being empathetic means
 - Viewing the situation from a customer's eyes & relate to how a customer feels.
 - Listening actively to the customer's frustration
 - Acknowledging their pain
 - Understanding how disruptive the experience is
 - Not defending what happened
 - Quickly start troubleshooting.
 - Avoiding the patient feeling ignored



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Patience

- Patience:** the capacity to accept or tolerate delay, trouble, or suffering without getting angry or upset
- Being patient means
 - Not getting overwhelmed when speaking to aggravated or rude people.
 - Conscious effort to remain balanced
 - Maintain professionalism.
 - Exercising self-control
 - Exhibiting a positive attitude
 - Staying calm

Patience of a Saint

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Consistency

- Think about where you consistently receive GREAT customer service.
 - Nordstrom
 - Coffee shop
 - Spa
 - Ritz Carlton
 - Restaurant
- If you were to choose one word to describe what makes these experiences great...

Consistency of experience

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Consistency

- The more consistently you're able to meet and exceed your customer's expectations, the more they will want to do business with you and recommend you.
- Consistency of experience is the first Step to GREAT customer service.

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Be Effective and Efficient

- Are you 100% 100% of the time?
- Why?
- Or Why not?
- How can we be more consistent?

consistent

Definition: always acting or behaving in the same way or of the same quality

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Goal Today


Success isn't always about greatness. It's about consistency. Consistent hard work leads to success. **Greatness will come.**
- Dwayne Johnson

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COVID Vaccine Story Chick-fil-A

A Chick-fil-A manager saved a drive-thru Covid-19 vaccination clinic after traffic backed up






Reevaluate

Intentional Accountability

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Is Your System Broken?


- Do we need a new system?
- Did we grow?
- Do we need more staff?
- Do we need an attitude adjustment?
- Do we need a staffing change?
- Do we need a reset?
- Do we need more fun?



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Customer Service is Everyone's Job

- **Remember that Customer Service is Everyone's Job**
- When your whole company is encouraged to be involved in ensuring a great customer service experience, each team finds a faster way to make amends and drive your business forward.



— Mo Hardy

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Build On What You Are Currently Doing

Great innovation can happen when you take what you are currently doing and modify it in new and creative ways.

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"The riskiest thing you can do is just maintain the status quo."

Bob Iger, Executive Chairman of The Walt Disney Company

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We see our customers as invited guests to a party, and we are the hosts. It's our job every day to make every important aspect of the customer experience a little bit better.


~ Jeff Bezos
CEO Amazon

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Good Customer Service

Good Customer Service Leads to:

- Happy Healthy Patients
- Happy Staff
- Successful Fun Practice
- Referrals
- Great Reviews
- Lifetime Patients
- Raving Fans



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###



The customer's perception is your reality. ~ Kate Zabriskie

Whose opinion matters most

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Every contact we have with a customer influences whether or not they'll come back. We have to be great every time or we'll lose them.

~ Kevin Stirtz



Intentional Customer Service

Building a Strong Foundation

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