



## **You never get a second chance to make a good first impression.**

If you lose the potential patient at the first phone call or within minutes of walking in the door, you may never have the chance to impress the potential patient with your dedicated and highly educated staff. Secret shopping has exploded on the healthcare scene in recent years. Although most OASAS providers utilize surveys to measure patient satisfaction, such data doesn't include the voice of the potential patient who never gets beyond the first phone call and "writes off" your organization at the first encounter. Secret shopping can fill in very important information from a group that isn't represented in patient satisfaction surveys - the potential patient.

OASAS providers that want to understand the potential patient experience can gain valuable insights through secret shopping phone encounters. Secret shoppers evaluate the phone encounters on specific standards including access, clarity, ability to answer questions, and overall impression. Secret shopping can validate patient satisfaction data, and at the same time, create a compelling story to accompany the data.

When it comes time to select a chemical dependence provider, individuals typically either ask friends and family for referrals, or use on-line review sites to make their decision. Therefore, a good reputation is critical to the success of the chemical dependence provider. However, even if the OASAS provider is staffed with excellent clinicians, other factors (e.g., scheduling issues; long wait times; confusing paperwork; rushed appointments) can leave patients feeling unhappy and dissatisfied.

Much of this type of information is difficult to ascertain from a satisfaction survey. Organizations are often at the mercy of the survey return rate. And because participation is voluntary, the surveying organization cannot demand clarification or explanation of responses. Surveys do a great job of measuring how satisfied patients are with various aspects of their encounter, but secret shopper narratives explain why the encounter was satisfactory or not.

Typically, secret shopping criteria include standard information, as well as the organization's own customer service standards or other quality measures. Secret shopping can also be used to assess if referrals are made within the system or if staff are sending patients outside of the system for care.

A secret shopper can diagnose a mysterious case of low patient retention and low referrals. For a chemical dependence provider, fewer patients means less money, which can lead to a failed business; however, a secret shopper can identify where the problem lies, and even suggest strategies to address the issues.

OASAS providers should use the rich feedback gathered through secret shopping to improve training programs, better articulate expectations they have of their staff, ensure that their external brand messaging matches their internal staff culture, and otherwise improve the patient experience. Many best practices can be gleaned from a well-managed secret shopping program.

or purposes of this SAPT Self-Assessment, the secret shopper should present as a pregnant, intravenous substance abuser, or someone calling on behalf of one.

## SECRET SHOPPER REPORT

<b>Did the employee answer the phone within 2-3 rings?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>Did the employee thank you for calling?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>Did the employee answer in a friendly voice?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>Did the employee supply his/her name and name of the location?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>Did the employee explain the appropriate priority of admission?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>If you were placed on hold, were you asked to hold?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>Were you thanked for holding?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>Were you offered a same-day appointment?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>If not, were you offered the next available appointment?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>Did the employee ask questions to determine your needs?</b>	<b>YES</b>	<b>NO</b>
NOTES		
<b>Did the employee respond with information relevant to your needs?</b>	<b>YES</b>	<b>NO</b>
NOTES		
ADDITIONAL FEEDBACK		