



# 3-minute case study: Recruiting patients as 'secret shoppers'

By Lia Novotny | December 6, 2017

**W**hat innovations drive success in healthcare? Here's a tactic from a leading healthcare organization on the athenahealth network.

## The problem

Patient satisfaction surveys have long been standard practice at Olympia Orthopaedic Associates (OOA), one of the largest orthopedic groups in Washington state with more than 100,000 patients in three locations. The surveys captured patients' complaints – long waits for appointments, difficulty in getting a real person on the phone – but not the precise causes of persistent issues.

With generic surveys, says Lourie Roberts, OOA's director of patient experience, "you just know if your company is doing better or worse. You don't really get enough information to actually fix anything." To solve the problems of extended wait times, phone transfers, and every other specific patient complaint, OOA needed a new approach.

## The solution

Roberts' own grandmother inspired a solution. As a "secret shopper" for Taco Bell, she was tasked with eating at the fast food chain and recording her observations as a consumer. "Why can't we do that in healthcare?" thought Roberts.

In 2015, Roberts began recruiting patients who had left extensive comments on surveys to become secret shoppers. Their job would be to take detailed notes on every aspect of their next appointment at OOA, from phone calls to the exam room. After each visit, Roberts called them, asking for "the good, the bad, and the ugly."

Those brief conversations revealed both highly specific issues encountered by patients – and breakdowns in workflows that caused the issues.

## The outcome

In her conversations about wait times for appointments, for example, Roberts learned that each team used its own scheduling workflow. That meant they couldn't help other teams during crunch periods. So, Roberts standardized the workflows and cross-trained teams to process each other's referrals during down time. Now, every patient is called back within 24 hours to schedule an appointment – and OOA hasn't had a complaint about long waits since.

Tracking secret shoppers' phone calls revealed why patients were complaining about being left on hold for long periods. OOA's physicians wanted every call to be answered by a real person. Tracking calls, however, showed that staff spent 5 to 10 minutes answering patients' questions when they called. Meanwhile, all other patients were kept on hold. So, Roberts installed a simple phone-tree system to route patients to directly to the department they needed. The fix reduced patients' complaints from 27 over three months to just three in the following five months.

*Lia Novotny is a frequent contributor to athenaInsight.*



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