Five-Star Customer Service:
A Step-by-Step Guide for Physician Practices
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Win support from leadership and set the five-star goal

Before you can set goals that will enable your practice to implement five-star service, you must bring leadership, your colleagues, and management on board. After you have their support, you can identify and articulate the five-star goals to the entire practice. Use the following checklist to keep yourself on track as you take these important first steps.

To do:

- Get your office’s physician leader on board
  - explain the value of a five-star service culture
- Bring your colleagues on board
  - leader makes commitment announcement to all office physicians
  - bring it to the board
  - provide resources, literature, and data
  - provide a mandatory educational program
- Bring your officer manager on board
- Set short-term and long-term goals
  - identify strengths and weaknesses
  - set a time table to accomplish short-term goals
  - set the stage for long-term success [e.g., schedule inservices for staff and physicians and training for a quality assurance committee within the first three months]
Win support from the physician leader

The first step you should take is to set up a meeting with the physician leader in your practice (if you are not this person yourself), in order to discuss why you want to implement five-star service. If the leaders in your practice do not believe it is important, they will not be able to fake it.

Who is the leader?

Although most medical practices do not lend themselves to a corporate structure, there is still typically someone who is in essence the leader. It may be because he or she started the practice or has grown into the role because of interest in management. In larger practices there may be a chief executive officer, a senior partner, or some other individual whose responsibility is in some way management.

Senior leaders are critical to this process. By essence of their role, the leaders typically quickly grasp the importance of this issue and begin to challenge others to get involved. It is essential that the leader commit to the concept. It is the leader who ultimately must understand the concept and its benefits, make a commitment to it, and announce it to others. Others will follow.

You can use the list below as an outline of key points to make during your meeting with the leader in order to convince him or her of the importance of five-star service. Each of these points is discussed more fully following the list.

**USE THESE DISCUSSION POINTS TO WIN SUPPORT FROM THE LEADER**

- Explain what five-star service is—and what it’s not
- Five-star service can help reduce liability
- Patients often rate the quality of their care based on the service they receive
- Five-star service principles improve the work environment
- The quality of service affects the practice’s bottom line and its reputation
Explain what five-star service is—and what it’s not

If you encounter any resistance during your meeting, it will likely be because the leader does not really understand what you mean when you say “five-star service.” You will need to explain what it is—and what it is not. Five-star service is not just a catchy slogan. It concerns the interaction between you, the physicians and your staff, the staff with each other, and all the above with patients.

Emphasize that this is not simply a concept that will make the practice a nicer place in which to work (although that is one of the benefits). It can also significantly impact the practice’s liability, bottom line, and the care provided to patients. It impacts your reputation in the community. It is estimated that for every dissatisfied customer (or patient), there are six others with serious complaints that you do not hear from. The single average customer with a complaint will tell on average nine people. Doing the math, you can see that this can get out of control. Unfortunately, customers are more willing to tell others of bad service.

There is no down side to embracing this issue in a serious way. Although it may require a certain investment in time, energy, and finances to start, the return is high and the potential positive results are clear and compelling. You may want to cite an example of a practice that successfully implemented five-star service and the positive outcomes, such as the practice described in the box below.

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**ONE PRACTICE REAPS MANY REWARDS BY IMPLEMENTING FIVE-STAR SERVICE**

One business manager of a large northeastern practice recently told us that dealing with staff issues—which included complaints about how they were treated by physicians, how they were treated by each other—and dealing with complaints by patients about the practice was so overwhelming that it could impact patient care. The practice was losing staff, physicians became so frustrated at times they would not communicate with the staff, and staff did not have time to return all of the calls from patients about legitimate service or care-related complaints.
Make sure that you explain that taking a serious approach means going beyond a passive understanding and acceptance of the concept. It cannot be just a motto or something that you put into your brochure or onto your Web site. It has to be something again that is truly understood and then accepted by the leadership. Practices are often enthusiastic supporters once they understand that this is not just about doing something because it may prevent a lawsuit. Its appeal is that it is good for the staff, physicians, and most importantly, the patients—which means the dual goal of practice enhancement and liability reduction can be achieved in tandem.

Present the five-star concept to the board and your colleagues

Once you have the physician leader’s support, it’s time to present the five-star concept to the practice’s board of directors and/or the physicians of the practice. The most appropriate and effective way to do this is for the physician leader to explain that implementing five-star service will be one of the most important goals for the upcoming year.

Explain the benefits

To truly understand the value of the five-star concept you must get past the fluff to the truly beneficial operational issues. The leader can send a letter to the other physicians explaining the five-star concept and the practice’s commitment to it. Next, you should schedule a mandatory meeting in which the physicians take part in an educational program that explains the five-star concept, its importance, and what it takes to get there.
You could look for a program sponsored by a vendor or your local hospital, or you could try to organize it yourself. Be aware that preparing for this meeting will require some research, though. You may want to consider enlisting an outside content expert, who will provide both objectivity and credibility without concern for political fallout. If you are insured by a form of captive insurer, you may want to recommend this topic for an educational program group-wide, or you can go to your commercial insurer and recommend it.

**Plan ahead for the educational meeting**
Getting all of your partners to an educational meeting sometimes is the first challenge. The practices which make this educational program mandatory are the most successful. This will require scheduling the meeting far enough in advance and simply setting requiring 100% attendance. This sets the right tone. Of course, you must be pragmatic. For example, many practices will have this educational meeting on two separate days, one in the evening and one in the early morning so that all will have a reasonable opportunity to attend. In many cases, they will introduce the concept first at a practice meeting and obtain some initial buy-in.

**Provide a comprehensive overview**
The program should begin with a review of the current liability environment. Include data supporting the concept that a physician can significantly change the liability equation through a realistic approach to improving patient satisfaction. The speaker should also provide examples of why promoting a five-star service concept will have a positive effect on what course patients decide to take in the first 24 hours after a complication; key points might include the following:

- Plaintiffs’ lawyers have used service lapses, such as the failure to return phone calls or lack of disclosure to a patient, in the courtroom to inflame a jury. This may result in a substantial verdict or settlement.

- When an effective and productive physician-patient relationship exists, defense lawyers are able to elicit from the patient statements related to their positive experience with the doctor. This may lead to the dismissal of a claim.

Finally, the presenter should address how five-star service concepts increase staff retention. It is important to have an experienced presenter who understands the liability equation and the impact which five-star service can have on your practice.
It is also important to acknowledge that the physicians have a hectic job, but to reassure them that this concept can be incorporated into their schedules. Share with them successes of other similar practices so that they know this is not a fuzzy concept and another nice idea, but rather something that is being accomplished by medical practices like their own all over the country. Acknowledge that it will take work, but it will yield positive results.

**Present the five-star concept to the board**

This should then be discussed at a board meeting of the practice, where the physicians are looking for complete consensus. Typically, the leader says that unless there is a unanimous decision to move forward they will not kick off the program. During the meeting with the board, you can present a scaled-down version of the information that is provided during the educational meeting.

*Note: A five-star program should be stopped before the kickoff if everyone is not on board. This will provide an opportunity and time for those not on board to be given additional information so that they too can understand and believe in the concept. Do not lose hope. The program can then move forward with everyone on board.*

**Bring your practice manager on board**

With the leader and physicians on board, the manager must be brought on board. Typically this all happens at the same time—you can either invite the manager to attend the educational meeting you have for your colleagues, or you can set up a separate meeting to explain the concept to the manager.

Often the manager or the office administrator becomes the driving force behind this concept. They understand the economics behind it. They struggle with staff retention, staff morale and productivity on the front lines. They are the recipients of complaints by patients and see the day-to-day operational issues that are impacted by poor communication be it from provider to provider, provider to staff or provider or staff to patient. They see the dollars that are wasted by trying to respond to angry complaints. They have had to deal with the schedule when a physician is pulled out of the office for two weeks for a trial, with no reimbursement. They deal with staff and physician burnout when involved in litigation and handle phone calls from patients who have seen headlines about the malpractice case in the newspaper.
They, perhaps more than anyone else, understand this concept, and in our experience, get behind it quickly. Although they tend to worry about whether the physicians will really buy into the concept, once they see that it has happened at the senior leadership and board level they are excited to present it to the staff. The manager is a critical part of this process and this should be treated seriously as to become one of the manager’s goals and something in which they are both evaluated and compensated upon.

Set short- and long-term goals

Now that the leaders, physicians, and practice manager are on board, the next step is to set goals that establish expectations. These are not just lofty fuzzy goals, but are specific goals that speak to what you are trying to accomplish.

Identify your practice’s service strengths and weaknesses

To set these goals, you must first identify areas of strengths and weaknesses. For example, you may begin with a confidential, short survey to both staff and physicians asking them to rate certain aspects of their practice. This includes an objective view of where they are on the service curve and what they would like to see better handled if they were patients. Further, have them identify what they have heard or believe the patients feel about their practice. Not only can this information be used to identify weaknesses and help you set goals, it should be built into an educational program for both physicians and staff (see Chapter 2 for more information on this). A sample Five-star service culture questionnaire is provided in the Appendix.

Set short-term goals with deadlines

Setting forth goals at the beginning, using benchmarks, and establishing a time table are important. Tailor the initial goals to the specific needs of your practice, and make sure that they are not too aggressive—early disappointment can kill the program’s momentum. Likewise, you must make sure you have some way to measure your goals. Here are some examples of short-term goals that you could modify for your own practice:

- Improve patient satisfaction ratings (especially if your practice is already involved in gathering this type of information)

- Develop a patient satisfaction survey and circulate it to a certain percentage of patients for the first time
We have provided in the Appendix a sample survey which is neither expensive to use nor cumbersome. The survey was developed in collaboration with George Strouse, Ph.D., a consultant and associate professor at York College of Pennsylvania in York, PA. It targets service from the beginning of an office visit to the end, including appointment-scheduling, check-in and reception, waiting room, exam room, doctor, and diagnostics.

- Incorporate three service excellence strategies in the weak areas that are identified through staff and physician surveys (described in more detail in Chapter 3) and put in place an audit tool to ensure that the strategies are implemented

- Improve the way the phone is answered

- Improve the method used to summon patients in the waiting room when it is time for them to go to an exam room

- Improve the interaction between the provider and patient during exams

- Improve the interactions between staff members, or between physicians and staff members

- Ensure that physicians consistently arrive at work on time

- Require that physicians and staff greet each other in the morning

- Provide training on how to handle patient complaints

You may want to set three practice-wide goals that you can accomplish in an initial three-month period. Or you may choose to require that each physician choose three behaviors to change during this time. At the end of the three months, each physician should assess their accomplishments and failures. If change did not occur, determine what barriers prevented you from effectuating change and seek strategies and tools for changing that behavior.

Include as a goal providing education for all physicians and staff on both the five-star concept and certain troublesome communication issues within the first 30 days.
Set the stage for long-term success with a quality assurance committee

An essential component of succeeding with the five-star concept is establishing a quality assurance committee. This committee should meet quarterly to set specific goals for the latter part of the year and also for the following year. You must provide training for the quality assurance committee members and a process begun which allows them to manage service lapses or events as they occur.
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