

# Case Study

## Improving the Patient Experience in Outpatient Surgery

### Background and Client Objectives

An outpatient surgical center approached TrendSource to identify service gaps that were leading to uneven scheduling and a less than desirable patient scheduling experience. They further needed to gather enough information to support developing a formal telephone and scheduling standard aimed at improving the patient experience by specifically address the following areas: physician



scheduling, access to care, flexibility of staff, sensitivity to patient needs, information gathering techniques, and phone etiquette. These areas were identified as key to improving the overall outpatient surgery experience and remaining competitive in their industry.

### Program Development and Methodology

TrendSource Trusted Insight determined mystery telephone audits would provide the best window into the patient experience and illuminate areas of the process ripe for streamlining. 210 mystery phone audits were executed over a one-month period, distributed evenly between the company's four satellite offices and its central scheduling office. Combining both recorded and non-recorded calls gave the client a direct line into their patients' experiences, and provided them a baseline with which to evaluate their future initiatives.

### Results and Analysis

The program identified several deficiencies within the scheduling system. Calls were too-often transferred from satellite appointment offices to central

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scheduling, and once those calls were answered, phone representatives often did not determine patient needs by asking probing questions or provide pre-appointment information.

Even more pressingly, roughly one-quarter of auditors reported that, based on their experience, they would not recommend the center to their friends and family, highlighting a concern regarding patient advocacy based on initial appointment calls. And, finally, appointments were unevenly distributed among physicians, leading to longer wait times and inefficiencies. All these areas, it was determined, would benefit greatly from a streamlined, more clearly defined process.

## Recommendations to the Client

TrendSource Trusted Insight made the following recommendations to the client regarding standardization and training curriculum:

- Craft and implement formal telephone and scheduling standards to ensure a consistent patient experience
- Develop training materials and scripts to support standardization of information collected by and provided to staff members
- Create best practices for determining which surgeon should be matched with which patient to avoid uneven distribution
- Once standards are set and training is complete, execute an on-going mystery call program for three consecutive months to measure improvement

Regarding the overall patient experience, TrendSource Trusted Insight further made the following recommendations:

- Consider a more consultative approach to appointment scheduling to send helpful pre-appointment information up front
- Capture location referral information over the phone to monitor where potential patients are generated
- Consider a competitive benchmark to validate overall access to care and determine if their average time to schedule an appointment is competitive
- Validate overall patient satisfaction with surveys of actual patients who completed their consultation