

Secret Shopper

What is a Secret Shopper?

A secret shopper is someone who poses as a regular customer at businesses that focus on providing service such as department stores, banks, restaurants and even doctors' offices and health centers. Companies use what the secret shoppers learn to improve their services and to determine what is needed to improve customer satisfaction and experience.

In this case, the secret shopper is you! It is a secret, so don't tell anyone outside of the team you are working with that you are doing secret shopper calls or you may not get the same results. This exercise will help you understand what your patients experience when they call for an appointment with providers. Keep in mind it is not about judging the performance of your center or your colleagues. It is about improving the patient's experience. In order to do that, we first need to know what that experience is like. Remember, the idea behind these calls is for you to walk in the shoes of your health center's patients—to experience exactly what patients do while they are scheduling an appointment at your health center.

Getting Started

The goal of these calls is to ask for and receive an appointment "as soon as possible" (today or tomorrow) with your own provider. If you are given an appointment weeks away, ask if there is any way to get one sooner with your provider. Or if you are offered an appointment today or tomorrow with another provider, ask if there is any way to see your own provider instead.

If you are concerned that the person answering the phone will recognize your voice, enlist the help of someone who can make the call with you. You can make a three-way call or use another extension so you can hear, first-hand, everything that happens on the call. For this option to be most effective, spend a few minutes coaching the person who will be doing the speaking portion of the call to make sure that he/she will have all of the information necessary to make the appointment (i.e., patient name, medical record number (if needed), date of birth, address and telephone number, provider's name).

Documenting the Call

Use rich detail when documenting the call to paint a vivid picture of the experience; see the Secret Shopper Call Summary Example on pages 2–3 as a guide. Use the Secret Shopper Call Summary on pages 4 to record the details of the call. When completing the summary, document the following information:

- Date and time the call began and ended.
- Number of times the phone rang and how it was answered (e.g., person, automated system).
- Whether you get placed on hold or transferred from department to department.
- If answered by an automated system and asked to work through a menu, describe that experience (e.g., "Prompted to select two for advice, then rang five times, spoke with Betsy, transferred to RN, got voice mail..." etc.). There is a specific section at the end of the form to include these comments.
- The language you spoke on the call—if you speak a language other than English, feel free to try your call in that language as this will give you valuable information about the experience of non-English speaking patients.
- Full detail on the conversation during the call.

After You Get an Appointment

After you have completed the exercise, make sure you call back and cancel the appointment! You can tell the appointment maker you have changed your mind.

It is a good idea to try out different scenarios as a shopper, so consider posing as different types of patients needing different types of appointments. Try doing calls at different times of the day.

Complete the Secret Shopper Call Summary as soon as the call is over. This will help you capture the most accurate information. Then review the call and, from your point of view, identify the top three things to preserve as part of the patient experience and the top three elements of the call that need to be fixed as soon as possible. Record these items in the Review and Comments Section.

Secret Shopper Call Summary Example

Shopper Name: Barbara Smith **Time call began:** 9:15 am
Health Center: Best Health Center **Time call ended:** 9:38 am
Service: Pediatrics **Language of the call:** English
Type of Appointment: Follow up **Total length of call:** 23 mins
Day of the Week: Tuesday **Date of Call:** 3/16/12
Date of the appointment I received: March 17, 2012

Description and Notes

[Redacted description and notes area]

Phone rings: 5 times

Phone picked up by (select one) Auto Attendant Person

Placed on hold - **Length of time on hold:** 4 mins

Health Center:	Good morning Best Health Center, can I help you?
Caller:	Good morning, I need to make an appointment.
Health Center:	Hold. (Put on hold with no warning—held for four minutes. When the person came back to the phone they began where the conversation left off.) Can I have your card number and doctor’s name?
Caller:	Oh, sure. My card number is 123456 and my doctor’s name is Santiago. I really need something soon. (I can hear typing on the keyboard in the background.)
Health Center:	I have an appointment on March 29. Do you want it?
Caller:	March 29? Do you have anything sooner? My son was kicked out of school today because of a ring worm infection, and I need him back in school. You don’t have anything sooner? Nothing?
Health Center:	(Sighs.) Hold on. (The phone starts ringing again, six times, and someone else answers the phone). Triage, Ms. C. speaking.
Caller:	Hi. Good Morning, I need to make an appointment for my son.
Health Center:	I’m going to transfer you to Peds so you can make an appointment.
Caller:	OK. (Phone starts to ring again—this time the phone rings four times.)
Health Center:	This is Peds’ Ms. S. speaking.
Caller:	Hi, I need to make an appointment for my son. He’s been taken out of school for ring worm infection. I need an appointment as soon as possible for him. They gave me March 29 but that’s too long to have him out of school.
Health Center:	OK, well—who is your doctor?
Caller:	Santiago.
Health Center:	Let me see...OK, he’s here tomorrow. Can you make it in at 12 pm?
Caller:	Yes, yes we can! Thank you so much.
Health Center:	You’re welcome. We’ll see you tomorrow. Remember to bring his insurance card. If anything changes and you can’t make the appointment, please give us a call at 555-569-4123.
Caller:	I will. Thank you. See you tomorrow.

Secret Shopper Call Summary

Shopper Name: **Time call began:**
Health Center: **Time call ended:**
Service: **Language of the call:**
Type of Appointment: **Total length of call:**
Day of the Week: **Date of Call:**
Date of the appointment I received:

Description and Notes

Phone rings:

Phone picked up by (select one) Auto Attendant Person
 Placed on hold - **Length of time on hold:**

Health Center:	
Caller:	
Health Center:	
Caller:	
Health Center:	
Caller:	
Health Center:	
Caller:	
Health Center:	
Caller:	
Health Center:	
If Auto Attendant is used, describe the experience	Considerations: Easy to use, confusing, too long, too many options, too few options, easy to access a live operator, etc.
Review & Comments	Identify three things to keep as part of the patient's experience. Identify three things to fix as soon as possible.

Source: Adapted from materials developed by Primary Care Development Corporation and Coleman Associates, 2006-2007; Neal R, et al.

Safety Net Medical Home Initiative

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The objective of the Safety Net Medical Home Initiative was to develop and demonstrate a replicable and sustainable implementation model to transform primary care safety net practices into patient-centered medical homes with benchmark performance in quality, efficiency, and patient experience. The Initiative was administered by Qualis Health and conducted in partnership with the MacColl Center for Health Care Innovation at the Group Health Research Institute. Five regions were selected for participation (Colorado, Idaho, Massachusetts, Oregon and Pittsburgh), representing 65 safety net practices across the U.S. For more information about the Safety Net Medical Home Initiative, refer to: www.safetynetmedicalhome.org.



MacColl Center for Health Care Innovation