

LTC CONF

How—and why—to get a customer's-

BY
BARBARA
GERBER



TO THE STAFF, JANICE PERKINS looked like any other person shopping for a long term care facility for a family member. She had scheduled an appointment to take a tour and was waiting in the lobby for the marketing representative. No one had informed her that the marketing representative was delayed.

An hour later, Perkins drove home, her work having just begun. She dictated a summary of her visit into her tape recorder and filled out her questionnaire, noting not only her extended wait in the lobby, but all other aspects of her visit. The receptionist had been friendly and courteous; the buildings and property clean and well maintained; the residents looked neat, clean, and happy; and the marketing representative was friendly, thorough, knowledgeable, and professional.

Perkins is a mystery shopper, hired by the facility's management to provide feedback on things such as first impressions of the facility; customer service; the marketing and rapport-building skills of the marketing representative; and what messages of responsiveness, sensitivity, quality, and professionalism are being communicated.

A mystery-shopping project often begins when the incognito shopper makes an inquiry call to the retirement community or assisted living or skilled nursing facility asking for information and continues through a first visit to the facility, sometimes extending through a second and third visit. It concludes when the mystery shopper reports on his or her experiences. In most cases, the mystery shopper uncovers examples of outstanding service as well as opportunities for improvement.

With 14 years of experience in mystery shopping at assisted living facilities, retirement communities, and skilled nursing

ILLUSTRATION BY WILL TERRY

IDENTENTIAL

eye view of your facility

facilities, I can offer the following suggestions and ideas for new and experienced mystery-shopper users. Whether you love or hate the concept, it's important to understand what mystery shopping can and can't do for your organization.

Be clear about your goals

First and foremost, you need to know what you want to accomplish by mystery shopping. Most people working in long term care organizations think of mystery shopping as merely a marketing tool for evaluating customer service and sales effectiveness. Its fundamental principles, however, make it useful for gathering objective opinions and intelligence for a variety of projects (see "What to shop for," page 20).

One unique assignment was prompted by responses to a satisfaction survey sent to families of residents at a nursing home that suggested the residents had to wait too long for assistance. The mystery shopper, pretending to be an interior designer, observed staff members' responsiveness to residents' call bells and requests for help. The objective was to find the reasons why the residents had to wait too long for assistance.

Be realistic in your expectations

Mystery shopping can be compared to a close-up, instant snapshot of one or more parts of your organization at specific points in time. Snapshots don't always capture us looking our best, but they do capture the immediacy of the moment. They're a slice of life, full of emotion, vitality, and reality. What mystery shopping does best is take a close-up look at what visitors who come to your facility encounter and document each moment.

You should keep in mind that mystery shopping should not be expected to determine *consistency* of performance in a specific area or take a comprehensive look at your facility as a whole unless it is done often, using a large volume of mystery shoppers. If you decide to conduct mystery shopping once or twice a year using a few mystery shoppers to make calls or visits to each facility, you will gain valuable feedback on individual performance, but you will not be able to gauge the consistency of the staff or facility's performance.

Never approach your first mystery-shopping experience

with the thought that it will be your last. Mystery shopping is most effective if it is ongoing, or conducted on a periodic basis, so you can see real patterns of progress. If you only intend to conduct a mystery-shopping project once, remember that there are limitations to the comparative or trend information you can collect.

Decide what, when, and whom to tell

In nearly every case, mystery shopping brings good and bad news. One question that is always asked is, "Should we tell the staff they'll be observed?" Even more importantly, "Should I tell them what was seen?"

Although every communication decision should be made on a case-by-case basis, it is frequently suggested that all employees be told that mystery shoppers will be visiting their facilities, but not when these visits will take place. Formally announcing a mystery-shopping project to employees minimizes breach of trust issues between management and employees.

To encourage employees to "authorize" the service, mystery shopping must be presented with a positive focus. It's better to emphasize the merits of mystery shopping for improving systems rather than monitoring people. I also recommend that the results of the mystery shopping not be communicated in their entirety to all employees. It's more personal and effective to communicate individual findings to specific employees and departments or to use the findings to develop future training and mentoring programs.

Choose your mystery shoppers carefully

A good mystery shopper will pass on valuable information about your facility and how it is meeting the needs of its customers. Well-trained mystery shoppers will be thorough, yet anonymous. Their reports will be detailed and compre-

Barbara Gerber is president of Devon Hill Associates, La Jolla, Calif., a firm that specializes in marketing and mystery-shopping services for skilled nursing facilities, assisted living facilities, retirement communities, and other health care providers nationwide. For more information on mystery shopping, call her at 858-456-7800 or e-mail her at <barbara@devon-hillassociates.com.>

hensive, but, most importantly, objective and insightful.

In choosing a mystery-shopping firm, you should look for an organization that will respect and protect your facility's privacy and its reputation, screens its mystery shoppers for their skills and reliability, and prepares them with detailed

ty or community being shopped knew who the mystery shoppers were.

Decisions must be made about who will manage the volunteer- or employee-shoppers and whether or how much the company will pay for their time. The manager will be

A good shopper can pass on valuable information

scenarios and performance criteria. Intelligence, excellent powers of observation, and the ability to think on your feet are important qualities for the individual mystery shopper, as well as a strong sense of ethics and objectivity. You want a firm that inspires your trust and confidence and that has experience in your industry. Above all, don't hesitate to ask in-depth questions about a firm's mystery shoppers. In addition to their background and training, you want to know about their knowledge of, and experience with, long term care facilities. You're depending on the mystery shopper to remain anonymous, to know what to look for, and to be able to record it as accurately, objectively, and comprehensively as possible.

Be aware that there may be trade-offs between the usefulness of the mystery-shopping firm's reports and the price of the service. Although the cost of mystery shopping is an important factor, you don't want to compromise the reliability of the report for a lower price since you will undoubtedly base operational and training decisions on the mystery-shopper reports.

Another question that is frequently asked is, "Should we use volunteers or staff from other facilities to conduct the mystery shopping?" Similar to internal communications, the decision about whom to use as a mystery shopper should be made on a case-by-case basis. However, there are a few things that need to be carefully considered if you're thinking about engaging volunteers or company employees for mystery shopping.

It's important to recognize the fact that not everyone makes a good mystery shopper. Whether you decide to use an outside firm, volunteers, or your own employees, the mystery shoppers should be selected based on the criteria previously mentioned. The mystery shoppers must also feel comfortable playing a role (read: telling a lie) so they can remain anonymous. We often hear that the mystery-shopping project wasn't successful because the facili-

responsible for the production of the rating questionnaires, individual scripts, and scenarios for the mystery shoppers, and for ensuring that each mystery shopper is committed to the execution of the project and its timetable. Volunteers may not be reliable because the mystery shopping is not "a real job" and they are not being paid for their time. If you do decide to use volunteers for the project, have a flexible timetable for the calls and visits.

Employees are not always good candidates for mystery shopping. Within their own organization because they may lack objectivity about the company itself. Even when employee mystery shoppers work in a facility or community across the country, their attitude toward the company, particular employees, or the concept of mystery shopping itself (or even hidden agendas) can influence their feedback.

Decide in advance how you will use the information

At the end of each mystery-shopping engagement, you should receive a detailed report complete with an analysis of key findings and specific information about the mystery shoppers' encounters with systems and staff. This information helps you to both identify and prioritize staff and areas for future improvement. But for mystery shopping to be truly effective, it is not enough to review the report. Your organization must develop procedures to process the feedback and take action on the information.

Mystery shopping plays an enlightening role in helping to improve marketing, enhance a facility's reputation, improve systems, and keep staff on their toes. Mystery shopping suggests how visitors really feel about their experiences with long term care facilities and helps administrators learn what systems and procedures are not working as well as they should. Successful mystery-shopping projects are realistic in their expectations, well planned, and carefully executed by well-qualified mystery shoppers. [CLTC](http://www.cltc.org)

WHAT TO SHOP FOR

Mystery shopping is more than a tool for gauging customer service and sales effectiveness at your facility. The information gathered can provide insight useful for numerous projects, such as:

- identifying the first impressions visitors have of your facilities;
- monitoring whether the proper information is being communicated to visitors;
- checking adherence to marketing standards, protocols, procedures, etc.;
- clarifying areas of poor performance indicated in other forms of research;
- identifying how prospective employees are treated during an interview;
- determining training needs;
- monitoring how the telephone is handled during business and non-business hours;
- checking for consistency of format, standards, and appearance from facility to facility (an asset for regional and national long term care systems);
- acquiring an "inside view" of how well your competitors perform.