

Customer episode or customer experience? You decide

Ask any doctor who runs a private practice, and he or she most likely will claim to have a good customer relationship management process in place. The staff is nice to the patients, the office files patient insurance claims on behalf of patients, and patients get reminder cards with smiley-faces on them for follow-up appointments.



Laura Squires
Guest Columnist

Ask the patient, though, and these things may be considered just the basics of customer service every doctor's office should have — nothing special, and definitely not what they would consider optimal management of the customer relationship.

Let's look at a real patient visit to explore the difference between business-as-usual and a true customer relationship management program.

A woman in her mid-30s visits a dermatologist's office for the first time. The office is tastefully decorated, the waiting room is not jam-packed and the wait is not too terribly long, all medical information and billing questions are handled in the exam room so as not to share it with everyone, and the overall visit is pleasant and professional.

However, after this patient leaves, she doesn't return. What happened? Was she

dissatisfied with the experience? Did she not really need the services of a dermatologist?

The doctor will never know. You see, this patient never saw the dermatologist. She was there for a skin cancer screening and to discuss concerns about flushing in her face. Because neither are complicated cases, the doctor had his physician assistant handle the examination. The patient didn't get to see the specialist, though she went to great effort with her primary care physician and insurance company to get approved to see him. In fact, the physician didn't even pop in to introduce himself to his new patient.

That alone left the patient feeling less than impressed with this first visit she had worked so hard to arrange. Still, the physician assistant was very competent, spent a considerable amount of time with her and compassionately addressed her concerns. If asked at the end of the session, the patient probably would have still given the visit high marks.

Problem is, she wasn't asked. In fact, she never had any other contact with the physician's office. Though she inquired about a number of other services the dermatologist's practice offered, including several private-pay services that offered direct financial benefits to the practice, no one ever called to follow up on her inquiries. She was not scheduled for a follow-up exam to check on improvements in her original complaint, and no one called to inquire about her condition

after her medical treatment.

If this patient were to continue a relationship with this doctor's office, it would be up to her. The patient, who has a choice about who she uses for those private-pay services the doctor is spending a chunk of profit on to advertise heavily, would have to make the effort to maintain a relationship with this physician's practice. Even then, she may never be able to establish one with the doctor, because he chose not to consider her first visit to his practice a major responsibility on his part.

Customer relationship management, or CRM, is about understanding the relationship from the customer's perspective, and about making that the most important perspective in planning your business strategy.

Even before this woman became a real patient for this dermatologist, the doctor should have known her. If he had developed a profile of his ideal patient, he may have taken this woman's first visit a little more seriously. You see, his ideal patient is a woman in her mid-30s, with discretionary income, who is seeing changes in her skin as she gets older, who may be showing the first signs of damage from years of sunbathing or from recent hormonal changes, who is concerned about her looks, and who may be interested in alternative cosmetic-type treatments such as microdermabrasion, botox and others not typically covered by insurance. This patient, the one he hasn't met and hasn't developed a

relationship with, is the future of his practice.

The health care customer's experience cannot be episodic. Hospital marketers like to joke that a patient who visits one of their specialists for a sigmoidoscopy can't have that be the only experience with that hospital, and still have a good feeling about the organization! In all seriousness, a visit to the physician's office isn't always a pleasant one. Consider, for a moment, what the patient experience is for someone going through chemotherapy. It is up to the doctor and his staff to find ways to enhance the customer relationship experience, so that the patient's total relationship with the practice is more than a procedure or treatment for a medical malady.

CRM works the same for realtors, law firms, restaurants, dry cleaners and the flower shop on the corner. The customer has a choice, but the business owner has a role in influencing that choice. You can make it easier to utilize your services or products, create opportunities, make the customer feel special, and include the customer in the process of continually improving the customer experience by asking for feedback, listening to the answer, and being open to change.

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Taking control of health is first step in managing costs

Health care costs are a lot like the weather. Everyone complains about them, but nobody seems to do anything. With expenses rising an average of 13 percent annually, businesses are looking for relief.

A recent UCLA study of 460 corporations found that 70 percent plan to make changes to their health benefits next year. Almost every company indicated it plans to reduce the level of benefits and increase the amount employees pay in premiums and deductibles.

While these steps will help, the answer to ultimately controlling costs may reside with the individual. What more can employers do?



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Dallas-Fort Worth, preventative health services ranked eighth among 10 factors considered when the respondents chose their current health plans. That's unfortunate because preventive care can stop many health problems before they start. Educate your employees about the preventive benefits in your health plan and encourage their use. Preventive care always is less expensive than catastrophic care.

Take aim

Put risk factors in the crosshairs. Educate employees and encourage them to take steps to reduce those risk factors they can control, such as alcohol consumption and tobacco use. Even the risk factors they can not change — age, gender, ethnicity — are important to consider so they can be aware of potential problems and seek early detection and treatment. There's nothing to be gained by waiting until something bad happens. Keeping people healthy is the best method to keep down costs.

Take initiative

A great way to motivate employees toward a healthy lifestyle is to lead by example. Start a walking club and put an announcement in the company newsletter to generate interest. Then carve out

time to participate. It'll be great for your employees' health and morale, not to mention your own. The short-term benefits such as reduced stress are plenty of incentive, and the longer-term prospects of a few less pounds make it an even better idea.

Best of all, it's an idea that works. Studies show that people who do NOT exercise are 1.5 times more likely to be absent from work at least seven days a year than people who exercise at least one day a week.

Take control

Here are some additional tips for taking control of your health and your health care costs:

1) Workplace wellness works — Studies indicate workplace health promotion programs reduce absenteeism by 20 percent and increase productivity by 16 percent. Check with your provider to see how to start a program, then promote it heavily among employees.

2) Choose healthy — Encourage healthy lifestyle choices, such as eating right, exercising and quitting smoking. Your company newsletter is an excellent forum for healthful persuasion.

3) Knowledge is power — Keep informed about health news and start a regular column in your company maga-

zine to disseminate helpful information. Good information sources include your health plan newsletter, provider pamphlets, Web sites (such as www.myhealthbenefits.net), health columns in national news journals, and health fairs.

4) Convenience cures apathy — If employees are apathetic about getting routine health check-ups, bring the check-ups to them. Many hospitals and clinics offer mobile health screening services that can come to your place of business. Check with your provider to see if these services are covered.

Taking control of your health is the first step in taking control of your health care costs. In the long term, a healthier life is its own reward and lower health care costs are a bonus everyone can enjoy.

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