

Mystery Shop Your Own Practice: Consultation Process

Purpose: To assist you in understanding how prospective patients experience your practice, and to help you assess how well your consultation process works.

Instructions: Have two separate people (colleagues, friends, etc.) schedule a consultation as if they were considering LVC at your practice. The 'mystery shoppers' should familiarize themselves with this worksheet before the consultation. Then, after the consultation (or during), they should record their experience and observations below. One 'mystery shopper' should schedule an LVC procedure after the consultation and record follow-up information in this worksheet. The other 'mystery shopper' should not schedule a consultation and should also record follow-up information in this worksheet.

Practice name: _____

Primary contact: _____ Position: _____

Patient experience

Consultation date: _____ Time between initial call and consultation: _____

Scheduled start time: _____ Actual start time: _____

Scheduling etiquette was: Excellent Good Fair Poor

Greeting etiquette was: Excellent Good Fair Poor

Number of staff members in contact with you: _____ Number of times you moved to a different room: _____

Length of wait in each room: _____ Length of consultation: _____

Was the office: (check all that apply) Clean Stylish Up-to-date Bright Dirty Drab Old Dark

Did you feel informed about the consultation process and have a sense of trust in the staff members and the doctor?

Were the personal information and medical history forms easy to read and complete?

Did the staff willingly assist you when questions arose?

Did they lead the consultation clearly and convey a willingness to help?

Did they assess your knowledge level/personality profile?

Did you feel rushed at any point during the consultation? When?

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LVC questions and answers

Were the staff knowledgeable about LVC? Did they offer a comparison of other procedures?

Did they offer information about how their practice differs from other laser centers?

Did they describe VISX® technology? Cross-compare with a competitive laser?

Did they review costs? (cost breakdown/payment plans, specials, etc.)

Did they discuss the doctor?

Were you shown a features/benefits video? An informed consent video?

If so, were the videos clearly visible and audible? Was the information useful and interesting?

Diagnostic testing

Which diagnostic tests were performed?

Were the technicians friendly and warm? Were procedures explained to you before they were performed?

Did you have adequate time with the doctor?

Were your questions addressed clearly and promptly?

Were you uncomfortable at any point during the testing? Why?

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Closure and follow-up

Were your questions and concerns adequately addressed?

Was there a 'call to action' during the conversation? A follow-up plan of action?

Were you asked about: Referral source Demographics E-mail address, contact info

Were you offered these additional resources:

Written info Faxed info Web site VISX web site Mentor patient

How long after your consultation did you receive a follow-up phone call? _____

Did you schedule an LVC procedure? Yes No

If you scheduled a procedure, how many weeks/days after your consultation were you able to do so? _____

What was the time between your consultation and when you received patient materials? _____

If you did not schedule a procedure, what follow-up information did you receive? How long after your consultation did you receive the follow-up information?

Overall impression:

WHAT NOW?

Share your completed worksheet with your BDM as you work together to develop an Action Plan. Keep your completed worksheet for future reference—it will serve as an instructive benchmark of your practice at this point in time.