



Mystery Shop Your Own Practice: Phone Communications

- Purpose:** To assist you in understanding how prospective patients experience your practice, and to help you assess how well your phone communication process works.
- Instructions:** Have someone (staff member, friend, etc.) call as if they were gathering information about LVC and your practice. Have them call after hours as well. The 'mystery shopper' should familiarize themselves with this worksheet before calling. Then, during and after the call, they should record their experience and observations below.

Practice name: _____

Phone number called: _____ Date: _____ Time: _____ Call length: _____

Spoke with: _____ Position: _____

Time on hold: _____ Message-on-hold: _____ After-hours info available

Phone/transfer etiquette was: Excellent Good Fair Poor

Describe your experience in regard to the following areas:

Did the LVC staff person take control of the conversation and convey a willingness to help?

Did they assess your knowledge level?

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

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

Did they discuss the doctor? The screening process?

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

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

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

How soon were you able to schedule an appointment?

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Tracking and follow-up

I was asked about: Referral source Demographics E-mail address, contact info

I was offered these additional resources:

- Written info Faxed info Web site VISX® web site
- Seminar Free consultation Mentor patient Screening

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.