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## DRAMATIC PERFORMANCE IMPROVEMENT (DPI)

### *Mystery Shopper Exercise*

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“Mystery” or “secret” shoppers are people who pretend to be customers but are actually customer-service evaluators (under-cover). By putting themselves in the customer’s shoes, they see exactly what the customer goes through in using the company’s services.

Health care organizations have discovered this simple but powerful tool. A “mystery shopper” is a staff member, manager, or paid professional who pretends to be a regular shopper. Think of this person as a kind of “investigative shopper”!

In this exercise, *you* are the mystery shopper. You are going to be a patient “shopping” for an appointment. By completing this simple exercise, you’ll better understand what your patients go through to get an appointment at your clinic. Don’t tell anyone you’re doing this exercise or there won’t be much “mystery” to the thing!

All team members must complete this exercise. Each of you will call in anonymously TWICE. You will provide a WRITTEN ACCOUNT of each call. We call the written account a SCENARIO, since it describes the patient’s experience.

#### INTRO

You have one week to do your two calls, unless your team sets an earlier deadline. **After you complete each scenario, email or text it to your Coleman coach for a little review and comment.**

Schedule a two-hour team session right after your scenario deadline so you can review all your written scenarios as a team. You’ll post them (on flip-chart sheets) on the walls of your meeting room and then review them together.

At the end of that session you will create a list of The Top Ten Common Patterns that you see among the scenarios. You’ll bring two of your scenarios and the top ten patterns to Learning Session One.

**This whole exercise will take you approximately three hours to complete** including the mystery shopper calls, writing up your notes, and the two-hour team work session in which you will share and determine the common patterns of these calls.

The detailed steps on the following pages will lead you through your mystery shopper work. This work is the foundation to all of our phone and access improvement work in Dramatic Performance Improvement.

Step

A

Call your clinic (or call center, or whatever) to see if you can be seen by a provider today because you woke up sick. You're not having an emergency, you're just thinking "The faster I get rid of this thing the better."

Or, you can decide to call for a more routine appointment like an annual PAP exam, for example. But you want the appointment as soon as possible. The emphasis in this exercise is always on "getting an appointment as soon as possible".

During the call with your DPI coach, decide how you will complete this work and by when (deadline)—but no longer than a week. As mystery shoppers, decide whether you are willing to see any provider or only a specific provider. And if you're a Spanish speaker, for example, decide if your mystery call will be in Spanish. Remember: Don't tell anyone you're doing these calls!

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Step

B

Now schedule a time that will work for you to make your mystery shopper calls. You will need a quiet place so you can listen carefully while taking good notes.

If staff will recognize your voice when you call, you will need to get a friend or relative to make the call for you while you listen in—either through an external speaker on the phone, or on an extension, or three-way calling (but make sure you're on mute!)

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Make one of your mystery shopper calls. The phone is ringing, right? On the worksheet at the end of this guide, write down how many times the phone rings before your call is picked up by an auto-attendant or a person.

Step

C

If the call is answered by an auto-attendant, write down as much as you can about what the auto-attendant says, what your menu choices are, what selections you choose, and what happens next. In other words, WRITE DOWN EACH STEP AS IT OCCURS. The more detail the better. If you get a person rather than an auto-attendant, do exactly the same thing. Write down what you say, what the other person says, and what happens.

TIP: If you expect to speak to a person, write down—ahead of time—what you're going to say in the beginning of your call (like a script). That will save you time in your note taking. Remember: You need to record *both* sides of the transaction, including what you say.

Continue the call until you succeed in getting an appointment. Write down the date and time of the appointment. Be a typical patient on each of these calls. You're not trying to be the very worst patient imaginable. But do make these calls real!

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**Step**

**D**

After completing the call, complete and review your written worksheet carefully and IMMEDIATELY. In the rush of the call you may have forgotten to write down some important details, so this is the time to make sure you get everything. **Then:**

- Call back and cancel the appointment! Just tell the appointment maker you've changed your mind; and
- Share your **worksheet to your coach**. You may email it or snap a readable photo & text it. Your coach will send you feedback and help you help you improve your mystery call work.

**Step**

**E**

Find yourself a few flip-chart sheets and some markers. Make highly readable copies of your worksheets in preparation for the two-hour team work session. Each written scenario should fit on a single flip-chart sheet. Your teammates will review your TWO scenarios so they should be easy to read.

**This is the agenda for the two-hour Mystery Shopper team work session.**

- First, make sure you have a flip chart and some markers.
- Second, choose your best organized teammate to lead this meeting.
- Third, tape all your flip-chart sheets on the walls of the room where you are meeting. You should be surrounded by these scenarios.

**Step**

**F**

**During the first hour** of this work session, review all the scenarios together. Read each aloud and then discuss briefly. You have about six minutes to review each scenario. **YOU MUST WORK QUICKLY BUT THOUGHTFULLY.**

After you complete your review, **take 30 minutes to identify and list the common patterns** you see among the scenarios—from a patient experience perspective. Record the patterns on a flip chart. Then reduce your list to your top 10 patterns. Now create a highly-legible flip-chart sheet to bring to Learning Session One.

**In the final 30 minutes** of this work session, choose two mystery shopper scenarios to bring to Learning Session One. These two scenarios can be any two scenarios as long as they are not extreme examples. Make sure you have really great flip-chart renditions of these two scenarios—that they are highly legible.

Now give these materials to **your most reliable and punctual teammate** to bring to Learning Session One. In that Learning Session, you'll hang these sheets for the benefit of your sister teams. It's a collaborative. We learn from each other!

## Mystery Shopper Exercise

**Shopper:** \_\_\_\_\_

**Facility:** \_\_\_\_\_

**Clinic:** \_\_\_\_\_

**Date of call:** \_\_\_\_\_

**Day of the week:** \_\_\_\_\_

**Type of appointment:** \_\_\_\_\_

**Language of the call:** \_\_\_\_\_

**Time call began:** \_\_\_\_\_

**Time call ended:** \_\_\_\_\_

**Total time of call in minutes:** \_\_\_\_\_

Step	Description & Notes
<b>1</b>	Phone rings _____ number of times.  Picked up by (check one): <input type="checkbox"/> Auto attendant <input type="checkbox"/> Person
<b>2</b>	
<b>3</b>	
<b>4</b>	
<b>5</b>	

**6**

**7**

**8**

**9**

**10**

**11**

**12**

**13**