



# Measuring What Matters: Patients' Satisfaction and Referrals

How one practice gauges the sources of its surgical volume.

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**U**nderstanding the source of one's customers and their level of engagement with one's brand is the essence of gauging the success of any business. Unfortunately, individuals in health care and particularly surgical practices tend to be fairly unsophisticated at tracking and understanding their customers and their behavior. For the most part, those in health care look at their schedules and wonder why they do not see more patients on the books. Oftentimes, they randomly advertise but never assess their patients' loyalty or their willingness to refer others to the practice. Here are some techniques that have worked for Center For Sight in Sarasota, Florida.

## SOURCES OF REFERRALS

In examining the surgical practice where I work, I found three primary sources of referred patients: independent optometrists, the optometrists within our practice, and the patient him- or herself. Independent optometrists account for 26% of all surgical referrals to our practice, the internal optometrists account for 37%, and patients' self-referrals account for another 37%.

Our ophthalmology group currently consists of eight surgeons and 12 optometric physicians. We are actively recruiting additional optometric physicians and will likely achieve a 2:1 ratio of ODs to MDs within the next year. We feel strongly that the integrated optometric and ophthalmic model is the best approach to caring for patients, and we remain committed to working with independent optometrists throughout the region on pre- and postoperative management.

## TRACKING INDEPENDENT OPTOMETRIC REFERRALS AND SATISFACTION

Because 26% of our surgical patients are derived from independent optometrists, we dedicate significant resources to these practitioners. Seven years ago, we

established two full-time positions that focus exclusively on meeting the needs of our independent optometric partners.

Much like a pharmaceutical representative, our physician relations manager is in the field calling on our referring physicians. Her primary responsibility is to ensure that each office is stocked with educational materials for patients, referral kits, maps, DVDs, postoperative instructions, and the like. She also provides educational opportunities to the optometrists and their staffs. In addition, she coordinates all of our continuing education meetings throughout the year and troubleshoots any problems that arise.

A referring physician concierge manages our referring physician hotline. Referring physicians may call it anytime to reach a surgeon, schedule a patient's visit, check on issues of comanagement, or discuss another need they might have.

Adding these two professionals to our staff has been critical to our success; we have seen double-digit percentage growth in the volume of external referrals during the past several years. We measure this volume by tracking each individual referring doctor's referrals to each surgeon by case type (eg, cataract, LASIK, blepharoplasty). We compare that figure to that for the same month of the prior year, and we compare the figure for the year to date to that of the previous year for each referring physician. We find that 60% of referrals from independent optometrists come from our top 25 referring physicians. We treat all referring physicians equally and have no special perks for our top referring physicians. We do share the referral numbers with the physicians, however, and we find that they like to see where they rank on the list.

Every 6 months, we conduct a referring physician satisfaction survey. For the past 4 years, we have seen our satisfaction scores improve. We have consistently received over 90% "top box" strongly agree/agree statements that correlate to positive satisfaction in our overall scoring

system from our referring physicians. We are now transitioning to an online electronic format for our surveys.

## MEASURING SELF-REFERRALS AND PATIENTS' SATISFACTION

Based on the statistics given earlier, it is clear that the vast majority of our business is generated in house (ie, referrals from our optometrists and existing patients). Based on our new-patient marketing-source reports, word-of-mouth referrals account for more than 75% of our new patient leads; therefore, patients' satisfaction and their referrals are a priority at our practice. Even so, we track our internal optometric referrals as precisely as we do our external optometric referrals. Again, although we offer no incentive or reward tied to patterns of referral, we share the information and data on trends with all of the optometric physicians on a monthly basis.

We conduct electronic surveys of all clinical and surgical patients after their comprehensive examinations and surgical procedures, so long as they provide us with an active e-mail address. Tallying the results of paper surveys was too labor intensive and costly for our practice. The electronic process is simple and inexpensive, and we achieve a high response rate. Although we ask a series of questions about patients' experiences, the single most important question is, "Will you recommend a friend or family member to Center For Sight?" Although greater than 96% of our patients consistently say yes, 4% say no. This is the most valuable information we can access. We need to know why that 4% will not recommend our physicians, so we ask them. Sometimes, they will provide us with an explanation. At that point, we have usually missed our opportunity to create a great experience for them. We do, however, take their feedback to heart. In addition to trying to fix the specific problem for the patient, we analyze the breakdown in the system that allowed the problem to occur so that we can create a long-term solution.

## CATCH A STAR

For the past 5 years, we have had in place a comprehensive approach to enhancing customer service, our star program. Our employees developed both it and the 12 characteristics of excellent customer service (Figure 1). The program has generated thousands of star awards for our team members from patients, coworkers, and physicians. The

**TEAM CENTER FOR SIGHT**

**12 Characteristics of Excellent Customer Service**

- ★ **Positive Attitude:** Wear a smile and conduct yourself with an upbeat demeanor, while demonstrating flexibility and approachability towards team members, customers and patients.
- ★ **Professionalism:** Present yourself in person and on the telephone in a way that is refined, polished, courteous, controlled, warm and helpful.
- ★ **Responsiveness:** Respond promptly to the needs of patients, customers and fellow team members.
- ★ **Problem Solving:** Be proactive in anticipating and preventing problems before they arise, address them and take ownership for them when they do arise. Turn a "problem" into an opportunity to exceed the patient or customer's expectation.
- ★ **Initiative:** If a task needs to be done just do it—go above and beyond for patients, customers and team members.
- ★ **Team Player:** Be a team player, pitch in to help other members of the team and work toward achieving team success.
- ★ **Accountability:** Assume responsibility for all of your actions and follow through to ensure you and your team complete tasks and assignments with attention to detail.
- ★ **Respect:** Treat patients and team members as you would want to be treated; demonstrating dignity, sensitivity and tactfulness in all communications. Be open and accepting of other people's values and needs.
- ★ **Stewardship:** Protect and ensure the best interest of the company at all times, and be an ambassador for your company on the job or in public. Use company resources economically and responsibly.
- ★ **Leadership:** Be a mentor to your fellow team members and new employees by exemplifying the characteristics of excellent customer service at all times.
- ★ **Compassion:** Be caring and empathetic to the feelings, thoughts and experiences of team members, customers and patients indiscriminately and without judgment.
- ★ **Intentional Excellence:** Be at the top of your game each day. Set a daily intention to be the best you can be in your position. Find joy and gratification in doing your job well.

**CENTER FOR SIGHT**

Figure 1. Center for Sight's employees developed this list as well as a comprehensive customer service program.

goal of the program is to catch someone in the act of doing something great and to reward him or her immediately.

Later this year, we will add to our company incentive program the metric of "Will you recommend a friend or family member to Center For Sight?" with monthly tracking toward a defined goal. Including this metric as part of an overall incentive should heighten everyone's awareness of the importance of word-of-mouth referrals as the lifeblood that fuels the growth of our practice. We will continue to strive to create exceptional experiences for our patients that surpass their expectations and engage them as ambassadors for our practice within our community. This effort will allow our employees and physicians to continue the meaningful pursuit of eye care for decades to come. ■

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