



Health Partners Plans

Customer Service Training Engagement Project

Webinar #2

Professionalizing Customer Service



About PCDC

Primary Care Development Corporation (PCDC) is a national nonprofit organization and a community development financial institution catalyzing excellence in primary care through strategic community investment, capacity building, and policy initiatives to achieve health equity.



Catalyzing excellence in primary care to achieve health equity

TRANSFORM

We partner with health care providers to build capacity and improve services and outcomes

INVEST

We provide capital to integrate services, modernize facilities, or expand operations

ADVOCATE

We advance policy initiatives to bring resources, attention, and innovation to primary care

Webinar Logistics

Will be recorded
and sent out after

Please fill out the
evaluation after

Use the chat box
and address to all
panelists and
attendees

Poll: Great Customer Service

How important is it to you to have great customer service?

- Very important
- Important
- Low importance
- Not important at all



Poll: Would you recommend your practice?

Thinking about the customer service in your practice/ clinic - would YOU recommend your practice for services to your friends and family?

- Yes
- No





How the customer explained it



How the project leader understood it



How the engineer designed it



How the programmer wrote it



How the sales executive described it



How the project was documented



What operations installed



How the customer was billed



How the helpdesk supported it



What the customer really needed

Objectives

- Define Customer Service
- Identify internal and external customers
- “Learn how to plan” your Customer Service Improvement strategy
- Determine best practices in customer service

Why Customer Service Training?

- Customer service training = increased employee engagement and enhanced patient experience
- HPP's investment in member satisfaction:
 - Post-visit survey in March 2018. (Paused in 2020)
 - Resumed in April 2021
 - Results used toward a satisfaction measure in the QCP program
 - Top performers rewarded with PMPM payment
 - low performers will receive a reduced QCP payout
- CAHPS measures now make up 33% of the entire Stars Program.

2021 Benchmark	QCP Impact
<80.5	Penalty: -15% of Total QCP Payment
80.5-83.9	Penalty: -10% of Total QCP Payment
84.0-86.9	Penalty: -5% of Total QCP Payment
87.0-93.9	No Impact
>93.9	Incentive: +\$1.00 PMPM

Customer Service Defined

- the process of ensuring **customer** satisfaction with a product or **service**. Often, **customer service** takes place while performing a transaction for the **customer**, such as making a sale or returning an item
- assistance and other resources that a company provides to the people who buy or use its products or services



Customer Service – The Real Deal

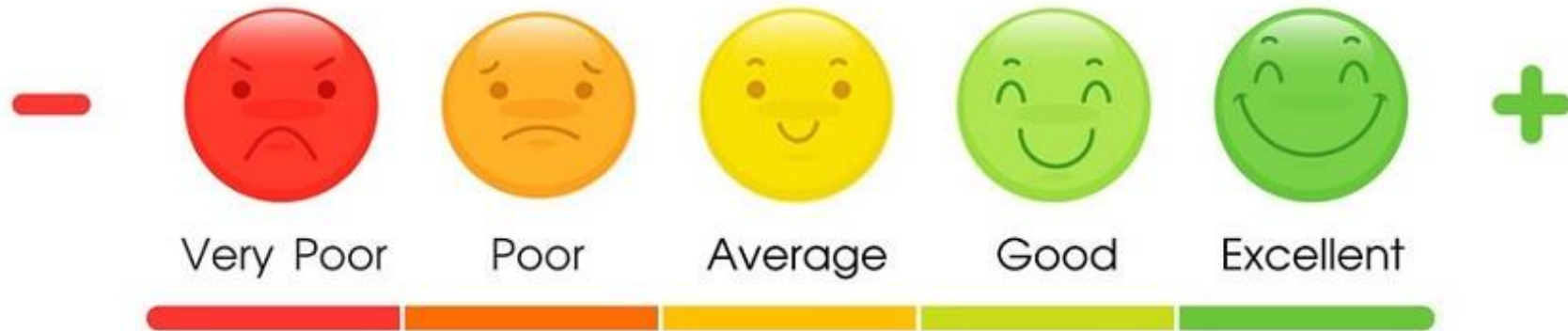


- Patient experiences set the expectation of care
- Happy patients return – and refer others
- Follow-up and follow through on patient feedback
- Poor service sheds light on deeper issues

<https://www.bizlibrary.com/blog/organizational-culture/customer-service-in-healthcare/>

Building Excellence in Customer Service

CUSTOMER SATISFACTION



Reflection on your Practice's Community Demographic



Urban
Suburban
Rural

Reflection on the Social and Economic Conditions

Condition

- Age
- Sex / Sex Identity
- Race / Language
- Income
- Built environment

Considerations

- What is the average age? What does an aging population mean to your practice?
- There's more than 2 categories
- Is health equity on your agenda- CLASS awareness? Do your patients trust you/r practice?
- Low, Median, High Income
- Buildings, parks, transportation, healthy food access, walk-ability, bike-ability

Reflection on your Products & Services

What products and services do we provide at –PCDC Community Health Center Diagnostic and Treatment Center

- Internal Medicine
- Pediatrics
- Prenatal and Postpartum Care
- OB/GYN/ Reproductive Health
- Cardiology
- Family Practice
- Behavioral Health
- Dietitian/Nutritionist
- Dentistry
- Podiatry
- Lab and Radiology
- Education
- Substance Use/Alcohol Use
- Smoking Cessation



You Do Better on A Test When You Study

- Do your homework on your business
 - Invest in the time to review the data you collect
 - Educate your staff on your service offerings and the community that you serve



Customers at Your Practice


Internal

- Co-workers
- Contractors
- Partners
- Students/Interns

External

- Patients
- Families
- Visitors
- Vendors

Poll: Internal/
External
Customer
Service
(2 part)

1. How would you rate your internal customer service in your practice in the last 12 months (scale 1/5 1= worst and 5 is the best)
 2. How would you rate your external customer service in your practice in the last 12 months (scale 1/5 1= worst and 5 is the best)
- 

What Does the Customer Want?

- Restoring health when ill
- Timeliness
- Kindness
- Hope and Certainty
- Continuity, choice and coordination
- Privacy
- No out-of-pocket cost
- The best medicine
- Medications
- To be listened to. . .
- Feel valued...
- To be respected. . .

Can you help me restore my health? Can you help me get my medications? Can you be respectful and kind to me by understanding my culture? Can you please hear me? Can you include my wishes in the care you render to me? Can you respect my privacy? Can you understand my community has been treated poorly historically and I have concerns trusting physicians? CAN YOU SMILE AT ME UNDER THAT MASK?

Shaywitz, 2011

Behaviors that Turn-off Customers

- Apathy- unconcerned/ indifferent
- Brush-off
- Snobbish
- Pretentiously kind- fake kindness
- Rule-Book
- Run Around
- Different Standards



What is Attitude?

Attitude is the way we perceive things and situations in our life

- Could be positive or negative
- Absolutely must show positive attitude when dealing with customers
- Positivity brings about confidence and energy into a person
- Positive attitude helps a person to cope with stress and problems in a better way = mental maturity, Emotional IQ



Displaying Customer Service Attitude

- Project confidence
- Be positive
- Demonstrate enthusiasm
- Manage your cadence
- Taking ownership
- Being courteous

DO THIS

Why didn't you ever call before you came?

He never takes his meds and keeps coming here for...

They said you don't have the right insurance so they can't give you an appointment

She always do this nonsense and think we supposed to bend over backwards to help her

You come late every time we give you an appointment. You must pay a no-show fee

DON'T SAY THAT

Planning for Improved Customer Service

01



Assessment

02



**Deciding
Outcomes**

03



Planning

04



Intervention

05



Education

Poll: Customer Service Strategy

My practice has a customer service improvement plan/strategy in place

- Yes
- No



Improvement Strategy for Customer Service/Patient Experience



Customer Service Improvement Techniques to Start Today





Reacting vs. Responding

Reacting

- Short term consequences
- Putting out fires
- Quick answers
- Stressed
- It just doesn't feel right
- Jump right in
- Ready-fire-aim

Responding

- Long-Term consequences
- Building relationships
- Right answers
- Much more relaxed
- The right feelings
- Ready-Aim-Fire



Reacting vs. Responding

What Should Your Response Be?

Condition

- Comfortable
- Indecisive
- Demanding
- Angry



Response

- Appreciation
- Reassurance/Clarity
- Action
- Validation

Empathy vs Sympathy



- **Empathy**
 - Acknowledge a person's feeling and his/her right to feel that way
- **Sympathy**
 - Agreeing with those feelings

Type in the chat - examples of negative consequences as a result of sympathizing with a customer?

Establish a Positive Rapport

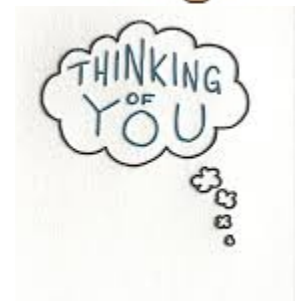
- Greet the customer with a smile
- Make eye contact
- Watch your sound/tone of voice and body language
- Have a sense of urgency
- Personalize and adapt
- Say “**Thank You**”
- Follow-up (if necessary)



The More You Know 

Use Effective Listening

1. Focus your full attention on the client
2. Hearing what is being said- **both** the content and **feelings**
3. Thinking about the meaning of what is being said



Practice Effective Phone Techniques

- Smile before answering the phone
- Answer the phone within 3 rings
- Clearly state the name of the practice and then your name when answering
- Use proper language and a warm friendly voice
- Be courteous and pleasant
- Tell the customer the action you're going to take and then DO IT!



Use Effective Face-to-Face Communication Techniques

- Focused attention
- Eye contact
- Body language
- Check your physical appearance
- Active listening
- Respect cross-cultural preferences



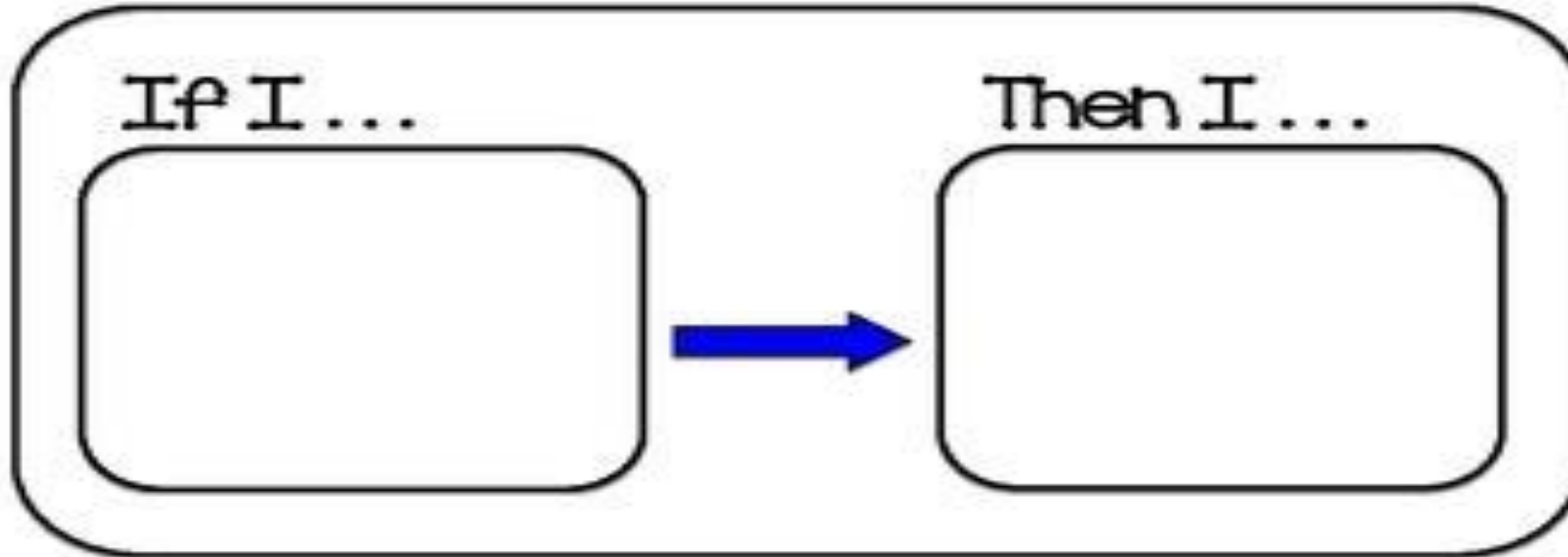
Conduct Drills to respond to Demanding Customers

Response to demanding difficult clients

- You need to do your self-talk
 - Be cooperative, efficient, confident and assertive - its not about you!
 - Don't be defensive, competitive - its not about you!!!!
- Make customer feel important - its not about you!!!!
- Keep the customer informed - its not about you!!!!



Our CHC Ensures we Create Positive Experiences



- Assure customer leaves an interaction in a comfortable and positive way
- Picture the customers take away
- Represent what it is like to do business with you and your clinic

In summary



Service Excellence Dimensions.

Reliability

Appearances

Responsiveness

Assurance

Empathy

Self Management

Flexibility

<http://www.business.vic.gov.au/marketing-and-sales/increasing-sales-through-marketing/customer-service-excellence>

HPP Commitment to be a Provider/ Member Partner

- HPP strives to be the #1 trusted health plan in the tristate area
 - Focus on improving member satisfaction scores and elevating members' experience with their health plan and their providers.
 - patients need to be able to trust their providers and the
- HPP is committed to working collaboratively their partners by investing in trainings and programs for their in-network providers



<https://www.healthpartnersplans.com/providers/training-and-education/satisfaction>

Questions?

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