



***Analyzing Your Organization through a Patient's Eyes:  
The Next Step for Improved Performance***

*Consulting Services for Hospitals, Clinics,  
Health Maintenance Organizations and Physician Practices*

**Devon Hill**  
A S S O C I A T E S

1535 El Paso Real, La Jolla, CA 92037  
Phone: 858-456-7800 • [www.devonhillassociates.com](http://www.devonhillassociates.com)



Whether it's a medical emergency or a routine exam, healthcare consumers rightfully bring high expectations to their treatment. Medical quality is a "given." But patients also expect courteous and responsive service, and kind and efficient care.

**Yet the reality is that many healthcare providers have only a limited understanding of how they are *truly* perceived by patients in these critical performance areas.**

Devon Hill Associates has created a powerful methodology that enables healthcare providers to assess their customer service and make informed decisions regarding the need for changes in systems, processes and behavior. Our pioneering services have attracted national print, industry and television coverage.

We work with a diverse group of clients — from small clinics to major hospitals — to provide insightful feedback about their current service culture, and make suggestions for improving service and increasing patient satisfaction. We also have extensive experience working with retirement and assisted living communities and nursing homes.

We welcome the opportunity to respond to any questions you might have about Devon Hill and our experience in helping healthcare organizations optimize their service performance.

#### WHAT HEALTHCARE CLIENTS SAY ABOUT DEVON HILL ASSOCIATES

"I just finished reviewing the first report; I actually enjoyed reading it. You did a great job of pointing out the opportunities in a way that is NOT degrading. I found much useful information that will be beneficial in training. Thank you for the hard work — I can tell we are going to be able to utilize the information to better our patients' experience."

*Brad Neet, Chief Operating Officer*

Saint Anthony's Health Center • Alton, IL

(Now CEO of Southwest Healthcare System, Murrieta, CA)

**Devon Hill**  
A S S O C I A T E S



## *Devon Hill's Range of Services*

Devon Hill Associates helps assess customer service performance in healthcare organizations using a unique approach it has developed over the years. Our **Secret Patient Service** evaluations are powerful tools that help diagnose and treat service quality problems, and increase patient satisfaction. They provide clients with valuable feedback about how they are *really* perceived by patients.

In addition, Devon Hill offers a variety of **specialized services** designed to improve marketing and sales performance, and increase occupancy at retirement and assisted living communities and nursing homes. A complete list of these services can be found later in this booklet.

### WHAT HEALTHCARE CLIENTS SAY ABOUT DEVON HILL ASSOCIATES

“We feel that your final report was detailed, thorough and extremely useful. In fact, we were absolutely fascinated with the abundant information you provided ... The project was well executed and we consider it to be an extremely worthwhile investment.”

*Von Crockett, Chief Financial Officer*  
Sharp Chula Vista Medical Center • Chula Vista, CA

“During the course of the contract, Mrs. Gerber was timely in response to network needs, thorough in the review process and flexible in navigating changes and barriers to produce a sound, usable and comprehensive assessment.”

*Debra Williams, CEO*  
Southwest Texas Network • San Antonio, TX

### ***Our focus: We aim to be a catalyst for positive change in your organization.***

Our professional team and mystery shoppers equip you with important information about your service performance — information you can't obtain any other way. We suggest concrete solutions and practical approaches to enhance service, improve patient satisfaction and increase referrals.





## ***Secret Patient Service Evaluations: Mystery Shopping for Healthcare Providers***

Mystery shopping is a well-established marketing research technique. It has been used successfully in business for many years, but is relatively new to healthcare. Devon Hill has pioneered its use with hospitals across the country through its Secret Patient Service.

We recruit and train qualified men and women to pose as real patients or visitors. These independent contractor mystery shoppers provide intimate and detailed feedback on a variety of services and systems, both inpatient and outpatient. They identify areas for improvement in hospitals, clinics or physician practices — from initial contact to the point of outpatient surgery.

### **Our Secret Patient Service evaluations can help you identify:**

- Lapses in communication, responsiveness and sensitivity that lead to patient dissatisfaction and lost opportunities for future care;
- Examples of potential legal liability; and
- System, process and behavior problems that result in positive or negative impressions of your staff and organization.

### **You can also use Devon Hill's service evaluations to:**

- Prepare for JCAHO and other surveys;
- Provide feedback on recruitment and interviewing practices — critical in today's tight labor market;
- Provide feedback on systems and processes when opening a new service or facility;
- Assess HIPAA compliance; and
- Compare your organization to its competitors.

Devon Hill's years of experience in healthcare operations and marketing assure you of a smoothly executed project and a well-documented and detailed report. Each report features extensive comments from carefully selected and prepared mystery shoppers, as well as valuable suggestions designed to help management take concrete steps to improve patient satisfaction.





## ***Specialized Services for Senior Living and Long-Term Care Companies***

***The following specialized services are offered by Devon Hill for retirement and assisted living communities and nursing homes.***

### **Audits**

Comprehensive, objective evaluations in marketing, public relations, communications and sales for senior living and long-term care organizations that are not achieving their goals — or that simply want to increase their competitiveness.

### **Brand Development/Marketing and Public Relations**

Research, analysis, strategy formation, product development and other services designed to build and advance brand identity in the marketplace.

### **Marketing Campaigns**

Research, analysis, strategy development and complete execution of marketing campaigns for existing and planned retirement and assisted living communities.

### **Referral Source Feedback**

Telephone and personal interviews with key customers. You'll learn what these customers think about you and your competitors, plus uncover problems in referral source relationships.

### **Sales Training and Coaching**

One to three days of onsite training for senior living and long-term care administrators and marketing/sales staff. Devon Hill's hands-on approach combines didactic and interactive workshops to improve skills and build confidence. Our coaching program provides ongoing support for new and seasoned sales staff.

### **Satisfaction Surveys**

Custom mail, telephone, focus group and personal interviews to identify resident and family satisfaction.

### **Secret Visitor Program**

Confidential, objective and critical assessments of sales, marketing and customer service effectiveness.

#### **WHAT SENIOR CARE CLIENTS SAY ABOUT DEVON HILL ASSOCIATES**

“Your customized and educated approach has generated superior information that will lead to the right decisions. The report is well worth the cost.”

***Richard Irwin, President***

National Health Management • Pittsburgh, PA  
(Now President of IntegraCare • Sewickley, PA)

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## A Sampling of Current and Past Healthcare Clients

■ Indicates a mystery shopping client

- **Burdette Tomlin Memorial Hospital**  
Cape May Court House, NJ ■
- **Bryn Mawr Rehab Hospital**  
Malvern, PA ■
- **California HealthCare Foundation (64 hospitals)**  
Oakland, CA ■
- **Chesapeake General Hospital**  
Chesapeake, VA ■
- **City Hospital**  
Martinsburg, VA
- **Comanche County Memorial Hospital**  
Lawton, OK ■
- **Community Hospital of Lancaster**  
Lancaster, PA
- **Franciscan Health System of Cincinnati**  
Cincinnati, OH ■
- **Highlands Regional Medical Center**  
Prestonsburg, KY ■
- **Hollywood Presbyterian Medical Center**  
Los Angeles, CA ■
- **Hospital Management Professionals (Quorum)**  
Brentwood, TN
- **Jameson Memorial Hospital**  
New Castle, PA
- **JPS Health Network**  
Fort Worth, TX ■
- **Kirkville Osteopathic Medical Center**  
Kirkville, MO
- **Lawrence Memorial Hospital**  
Medford, MA
- **Marshall County Hospital**  
Benton, KY
- **Medical City Dallas Hospital**  
Dallas, TX ■
- **MultiCare Health System/ Medical Park at Covington**  
Covington, WA
- **Northern Illinois Medical Center**  
McHenry, IL
- **Occupational Health Research (OHR)**  
Showhegan, ME
- **Ohio Valley General Hospital**  
McKees Rocks, PA
- **Penobscot Valley Hospital**  
Lincoln, ME ■
- **Planned Parenthood of Northern & Central AZ**  
Phoenix, AZ ■
- **The Plastic Surgery Group**  
Wausau, WI ■
- **Priority Health Plan**  
Virginia Beach, VA
- **Providence Occupational Health**  
Granite City, IL
- **Regional Medical Center**  
Orangeburg, SC ■
- **Saint Anthony's Health Center**  
Alton, IL ■
- **St. Francis Hospital**  
Jersey City, NJ ■
- **St. Joseph Hospital**  
Nashua, NH
- **St. Joseph Hospital**  
Paris, TX
- **St. Lawrence Hospital**  
Lansing, MI
- **St. Mary Hospital**  
Hoboken, NJ ■
- **St. Mary Hospital**  
Port Arthur, TX
- **Saint Michael's Hospital**  
Stevens Point, WI ■
- **St. Peter's Hospital**  
Helena, MT ■
- **Sentara Healthcare**  
Norfolk, VA ■
- **Sharp Chula Vista Medical Center**  
Chula Vista, CA ■
- **Sharp Medical Group**  
San Diego, CA ■
- **Siemens (30 offices/5 states)**  
Piscataway, NJ ■
- **Southwest Texas Network**  
San Antonio, TX ■
- **Southampton Hospital-Westhampton Clinic**  
Southampton, NY ■
- **Tift Regional Medical Center**  
Tifton, GA ■
- **Tri-City Medical Center**  
Oceanside, CA ■
- **Tulare District Hospital**  
Tulare, CA
- **Verde Valley Medical Center**  
Cottonwood, AZ ■
- **Virginia Hospital & Healthcare Association (11 hospitals)**  
Richmond, VA ■
- **Welbourne Clinic**  
Evansville, IN

### WHAT HEALTHCARE CLIENTS SAY ABOUT DEVON HILL ASSOCIATES

“We have found this information to be extremely helpful as we plan customer service improvement. Your approach certainly provided a new perspective on our operations.”

*Robert Chaloner, President & CEO*

Franciscan Health System of New Jersey • Jersey City, NJ  
(Now President of Southampton Hospital • Southampton, NY)



## *Additional References*

“I have worked with Barbara for over 10 years in two different hospitals. Barbara and her team did an excellent job putting together a mystery shopping program for our hospitals. Her analysis was clear, concise, and right on target.

I would recommend her highly.”

***Britt Berrett, Ph.D., Executive Vice President***

Texas Health Resources • Dallas, TX

(Now Program Director/Faculty, University of Texas at Dallas • Dallas TX)

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“Hurley Medical Center in Flint, Michigan engaged the services of Devon Hill Associates to perform a mystery shopping engagement for our inpatient and emergency department services. Not only were they highly efficient in their coordination of this effort, but they also went beyond our expectations in terms of the feedback they were able to provide to us.

As co-chair of the team that commissioned this project, I myself was overwhelmed by the diligence they took in providing information about every aspect of improvement that they thought was possible for our entity. They readily pointed out positive impressions as well. I would highly recommend their services to any health care organization. Their “shoppers” were highly aware of patient safety standards, as well as, service standards, which made their report that much more meaningful.”

***Melany Gavulic, R.N., M.B.A., Vice President for Procedural and Ambulatory Services***

(Now Chief Executive Officer, Hurley Medical Center • Flint, MI)

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“I want to compliment you and your team for completing such a thorough mystery shopping assignment for the Emergency Department at Tri-City Medical Center. Your detail was extraordinary. Your team of “shoppers” were able to effectively assess our weakness and strengths. Thank you so much for your professionalism and diplomacy.”

***Sharon Schultz MSN, RN, MPH, Chief Nurse Executive***

Tri-City Medical Center • Oceanside, CA

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“Thank you for your most interesting and informative report about accessibility and service at some of our centers. We selected your firm out of a field of several candidates and have not been disappointed.

Your report regarding the areas identified for this project was not only thorough and comprehensive, but provided us with a level of detail that will enable management to make important changes. When we engaged you for this project, we did not anticipate that we would receive as much detailed information as you were able to provide.

Ours was a complex project and yet, your firm was able to overcome most of the obstacles and meet the deadline for the final report. We look forward to continuing our relationship with Devon Hill Associates.”

***Charles Williams, Vice President of Support Services***

JPS Health Network • Fort Worth, TX

(Now Chief Operating Officer, Doctors Hospital of White Lake Rock • Dallas, TX)

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Meet

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**Barbara Gerber, FACHE**, is founder and president of Devon Hill Associates, headquartered in La Jolla, CA. Established in 1987, Devon Hill provides marketing, sales and mystery shopping services to the senior living/long-term care industries and mystery shopping to hospitals and clinics nationwide.

Devon Hill's innovative "Secret Patient Service" is considered among the leading hospital mystery shopping services in the country. It has been featured on national television and in articles appearing in the *New York Times*, *The Wall Street Journal*, *LA Times*, *San Diego Tribune*, *Health Executive*, *Hospitals and Health Networks*, *Trustee* and *Healthcare Forum Journal*.

Prior to establishing Devon Hill Associates, Barbara served as a senior executive at two hospitals. She brings relevant, hands-on experience in strategic planning, hospital operations and marketing, new program development, public relations, special events and physician recruitment. Her marketing programs have captured numerous awards, including the Marketing Excellence Award in Healthcare and Marketer of the Year from the Pittsburgh Chapter of the American Marketing Association, and the HCA Management Company's Northeast Marketing and Public Relations Conference Administrator's Choice Award.

Barbara has co-authored chapters on marketing communications for the University of Iowa 1989 *Series in Nursing Administration* and the American Hospital Association's book, *Occupational Health Services: Practical Strategies for Improving Quality and Controlling Costs*. She also has written articles on mystery shopping and customer service for *the Group Practice Journal*, *Contemporary Long-Term Care* and *Assisted Living Today*. Barbara holds dual master's degrees in public health (health administration) and library science and a marketing certificate from the University of Pittsburgh.

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**Tina San Roman**, is founder and president of Coast to Coast Scheduling Services, Inc., which partners with Devon Hill Associates in recruiting top-level mystery shoppers. Coast to Coast Scheduling Service is the nation's second-largest mystery shopping recruitment company, with a database of over 250,000 shoppers nationwide and 40 recruiters and schedulers. Through its partnership with Coast to Coast, Devon Hill offers greater depth and enhanced resources for its clients.

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**Mary Kukovich**, Devon Hill Associates' communications partner for more than 20 years, has helped to develop comprehensive, award-winning public relations and communications plans to launch the grand opening and promotion of several independent and assisted living communities, create materials for Devon's turnkey occupational health marketing program that was used by 11 hospitals nationwide, and provide branding and publication support.

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**Patricia Searle**, administrative assistant, brings exceptional administrative, organizational and office skills to her work with Devon Hill Associates, as well as computer programming and database design and management skills and experience. Patricia collects, assembles and provides initial editing and analysis of mystery shopper data. She is proficient in Word, Excel, Access, desktop publishing and multidimensional database design and management.



Selected Articles  
and  
Media Coverage

# To Rate Hospitals, She Dons a Wig and Practices Her Cough

## Going Undercover As a New Patient

By DAVID J. MORROW

**T**O anyone sitting in the emergency room of the hospital, Barbara Gerber looked like any other patient. She filled out forms, chatted with the triage nurse and plopped down in a chair to wait her turn.

A half-hour later, Ms. Gerber was ushered inside and left in the hands of a paramedic. While he examined Ms. Gerber's throat for the cause of her bad cough, she gave him a thorough looking-over, too.

"Apparently, he had just gotten out of an ambulance," Ms. Gerber said. "His shirt tail was hanging out and there was dirt all over his shoes. You'd expect someone to be dressed in white. His appearance didn't inspire a lot of confidence."

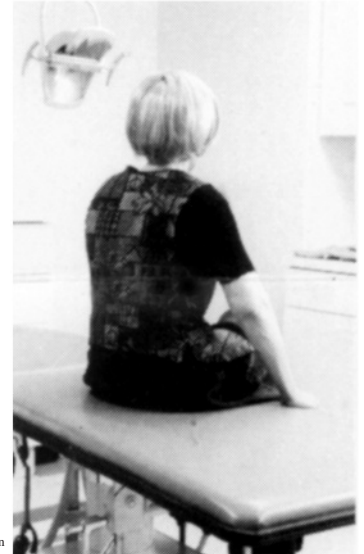
Minutes later, after receiving a clean bill of health from the soiled, young paramedic, Ms. Gerber drove home, her work having just begun. She then dictated into her tape recorder, noting not only the paramedic's appearance but how long she had to wait in the emergency room of the hospital, which was in a small Northeastern town.

The emergency room receptionist had been friendly, and the desk neat and tidy, she recalled. But on her way to meet the doctor, she was sent down a dark hallway.

"I thought, 'What is going on here?'" she said. "'Is this place closed or something?' That could have been very frightening."

That emergency room may never be the same after her visit. Shortly thereafter, she filed a written report to the hospital. "I'm sure the staff was told to keep the lights on in the hallways after that," she said.

While doctors are used to hearing patients grumble, few complaints carry more weight than Ms. Gerber's. Rare in the health care industry, Ms. Gerber is a consultant hired by doctors and hospitals to rate their services by posing as a patient. Undercover consumers have long been used by retailers and hotel chains to improve customer service, but they



From the front desk to the examining room, Barbara Gerber of Devon Hill Associates in San Diego checks out how patients are treated in health care facilities that hire her. Sometimes she has a routine procedure, like a mammogram, and sometimes she fakes an illness.

are gaining favor in the health care industry, as more hospitals, health maintenance organizations and doctor's offices try to improve reputations and attract patients.

"These sleuths are keeping the health care providers on their toes," said Diane Archer, executive director of the Medicare Rights Center, a health care consumer rights group in New York. "We need more of them. And more power to them. They are uncovering important information 'that helps to promote a more accountable health care marketplace.'"

Ms. Gerber fell into the profession. Admitted to a hospital six years ago, she was amazed at the attitudes and the services, good and bad. At the time, she was working as a hospital administrator and thought how easily patient service could be improved by listening to patient's suggestions.

As the owner of Devon Hill Associates, a company based in San Diego that conducts health care marketing and sales training, Ms. Gerber soon added mystery shopping to her repertoire. Since 1991, she has made undercover visits for 15 long-term care companies and has picked up three hospitals and a doctor's office as clients in the last three years.

**V**ISITS from Ms. Gerber are thorough and expensive. She encourages doctors and hospitals to sign up for one or two inspections to try out the service. One visit costs as little as \$400, but the price climbs quickly to \$5,000 for a regular inspection, which usually involves three or four visits. Clients who want Ms. Gerber long term, which usually includes monthly inspections at 20 to

30 sites each year, can expect to pay about \$60,000 a year.

The fee buys an inspection that almost always exposes a few hospital flaws. Three years ago, Ms. Gerber visited Chesapeake General Hospital in Chesapeake, Va., inspecting the mammography clinic as well as long-term care facilities and the gym.

"Barbara actually came in and had a mammogram," said Becky Maples, vice president for planning and marketing at Chesapeake General. "None of the staff complained about being fooled, but in a way Barbara was a real patient."

While Chesapeake's mammography clinic met with Ms. Gerber's approval, the hospital's gym did not. Because the hospital wanted to attract people from the community to exercise, Ms. Gerber was alarmed by what she saw as a lack of enthusiasm among some of the hospital's sales staff.

"Apparently, our sales people would show people around the health facility, and they would be good at giving information but wouldn't try to close the sale," Ms. Maples said. "It was something easy to correct, but we may have not known about it had we not had the viewpoint of someone who had actually been through it as a shopper."

Some visits have provided a few surprises. Unstoppable in her critiques, Ms. Gerber once

made it all the way to the operating table to inspect an outpatient surgical unit. She brought the procedure to a halt by telling the surgeon, who was in on the ruse, that she drank orange juice a few hours before, a disqualification for anyone scheduled to receive anesthesia.

Afterward, Ms. Gerber dressed and went home, but not before she noted that the surgical staff had behaved professionally.

The operating room may appear to be daunting territory, but Ms. Gerber said she has little trouble getting inside. Because Ms. Gerber has an inside contact at the companies that hire her, she can arrange to have procedures bent to allow her to complete her inspection quietly. Usually, the extra hand isn't necessary.

"Sometimes the client may give us a script of what they want us to say to get in," Ms. Gerber said. "But getting inside the emergency room is relatively easy. People come in there with all kind of complaints that aren't emergencies. I can say that I have a shoulder injury or a bad cough. They treat me as an outpatient."

On most visits, she wears street clothes, though sometimes she also dons a wig to avoid being recognized.

To be fair, Ms. Gerber and two of her employees often visit a site three times before

writing a report, taking care each time to note the good with the bad. One emergency room receptionist was written up for repeatedly turning her back while

quizzing one of Ms. Gerber's colleagues about her health history.

If the hospital staff cannot make enough mistakes on their own, Ms. Gerber joyously provides some ample opportunities. One of her favorite ploys is to refuse to give her birth date to emergency room registrars. Few hospital employees are willing to accept no for an answer and spend as much as a half hour badgering her for it.

"Not giving your birth date can sometimes be a real problem for them," Ms. Gerber said. "The computer may not print the form out if all the blanks aren't filled in. It's interesting to note how upset the hospital staff person gets. The goal is to make the patient feel comfortable, not hound him."

**W**HILE patient posing may be new to the health care industry, other forms of consumer inspection are also at work. Elizabeth Moore, 75, a retiree from Denver, started shopping last April for a Medicare H.M.O. for herself and her 88-year-old husband, Thornton, and was appalled by what she found. After sending questionnaires to five H.M.O.'s seeking details on their coverage,

two refused to respond, and she later discovered that the other three had given inaccurate answers.

Roiled, Mrs. Moore became one of the worst enemies of H.M.O.'s in Colorado. To warn the elderly about problems of Medicare H.M.O.'s, she developed her "10 Commandments," a set of questions that consumers should ask before buying a policy. And she is setting up a Web site (<http://www.healthcare-disclose.com>). Last summer, she sent the list to Colorado legislators, who are considering a bill that would require H.M.O.'s to make their policies easily comparable so the elderly can understand them.

Mrs. Moore has made her commandments available to anyone in the United States who wants them. As of last week, she had mailed out 320 copies in Colorado alone.

"The point is that if you don't do this kind of shopping, then consumers can't make good decisions," Mrs. Moore said. "Some of these facilities don't want consumers to shop. That's all the more reason to do it."

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Barbara Gerber is President of Devon Hill Associates, a healthcare and long-term care marketing and sales training firm that offers mystery shopping services to hospitals, HMOs, clinics, physician offices, nursing homes, assisted living and retirement communities nationwide. Devon Hill Associates is located in La Jolla, California. For information on mystery shopping and other services, call 619-456-7800.

# Pittsburgh Post-Gazette®

WEDNESDAY, DECEMBER 7, 2005

Consultant goes undercover in hospitals  
to assess quality of care

## The mystery patient.

By Joe Fahy,  
Pittsburgh Post-Gazette

**L**eft alone in her hospital room, Barbara Gerber spent much of her time taking careful notes about the details of her care. Or she hid in the bathroom, where she dictated her observations into a tape recorder.

Except she was just pretending to be sick, posing as a patient to help improve the hospital experience for patients who are really ill.

Hospitals use undercover patients provided by her company, Devon Hill Associates, to give feedback about the experiences that real patients likely will encounter.

The concept of using trained shoppers to anonymously evaluate service delivery, known as mystery shopping, is well-established in the retail and hospitality industries but is relatively unusual in hospitals.

Stacy Innerst/Post-Gazette



Hospital officials generally become interested in mystery shopping to investigate patient complaints and to “raise the bar on customer service,” said Ms. Gerber, a longtime Pittsburgh resident who now lives in La Jolla, Calif.

“When people go into the hospital, the first thing they want is the very best medical care,” she said. “The second priority is to feel important -- for the staff to listen, be caring and kind.”

Surveys or other tools that measure patient satisfaction may give hospital administrators an idea of problem areas. But mystery shopping can further pinpoint the cause, Ms. Gerber said.

At one hospital that had complaints about slow preadmission screening, Ms. Gerber, feigning to be a patient, noted that the screening area was combined with an outpatient surgery recovery area. Her company’s report noted that nurses were hard-pressed to serve both areas, and the sounds of recovering patients were upsetting to patients being screened.

“We made a significant difference,” Ms. Gerber said, noting that the hospital decided to provide those services in separate locations.

Robert Chaloner, president of Cabrini Medical Center in New York City, said he used Ms. Gerber’s mystery shopping services when he headed a health system in New Jersey.

Many patients spoke Spanish, he said, so Ms. Gerber hired mystery shoppers who acted as if they could not speak English. Their observations led to a number of changes, including the hiring of bilingual staff at the front desk, he said.

Brad Neet, president of Saint Michael’s Hospital in Stevens Point, Wis., said he has used Ms. Gerber’s mystery shopping services at two hospitals. Among the resulting changes: the writing of thank-you notes to patients.

“I think in our arrogance, we think we understand what the patient needs,” said Britt Berrett, another repeat customer and president of Medical City Hospital in Dallas. “We need to be humble enough to realize that a different set of eyes can provide tremendous insight for the needs of patients.”

While she often uses other mystery shoppers to help her, Ms. Gerber said she poses as a patient herself in every project. She has often appeared at emergency rooms complaining of imaginary

symptoms. Once, she was on a gurney waiting to be taken to the operating room for cosmetic surgery when the procedure was called off, allegedly because she had eaten a few hours earlier.

In that case, the surgeon was aware that she was not a real patient. While a doctor’s cooperation is sometimes needed and the hospital staff is generally informed of a mystery shopping project, Ms. Gerber said she and her workers have always gone undetected in the departments they are investigating.

Noting that keeping a low profile is an important part of her job, Ms. Gerber declined to disclose her age. The only photos she shared showed her wearing a wig.

When she appears as a patient, she never uses her name and is careful to alter not only her appearance, but her personal history.

“That’s why we’re never found out,” she said. “You have to be very careful.”

Ms. Gerber said she got the idea for mystery shopping in hospitals more than a decade ago, after she had a negative experience as a real patient at a Pittsburgh hospital she declined to name.

“I had gone in for some surgery and had a life-threatening experience,” she said, refusing to discuss the incident in detail.

She had a background in hospital administration, and her consulting business focused at the time on using mystery shopping to evaluate the sales effectiveness of assisted living facilities.

“I decided maybe I could combine the tools I had already developed on the long-term care side with my background in hospital administration, and put together a program that could help consumers have a better experience in hospitals.”

Since then, she has conducted mystery shopping in hospitals in more than a dozen states.

A Pittsburgh native, Ms. Gerber grew up in Squirrel Hill, where her father was a family physician and her mother was a homemaker.

She graduated from Allderdice High School, then attended Penn State University and graduated from the University of Pittsburgh. She and her husband, Dr. Michael Gerber, a former cardiac surgeon at Shadyside Hospital, have three grown children.

After her marriage, Ms. Gerber earned

a master’s degree in library science at the University of Pittsburgh and became a medical librarian at Pitt. Deciding she wanted to be a health care administrator, she returned to Pitt and earned a master’s of public health in health administration.

She worked for four years in strategic planning and physician recruitment at Aliquippa Hospital, then was marketing director for several years at Ohio Valley General Hospital.

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“We need to be humble enough to realize that a different set of eyes can provide tremendous insight for the needs of patients.”

**Britt Berrett, president  
Medical City Hospital, Dallas**

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William Provenzano, Ohio Valley’s president, remembered her as “bright, capable and energetic” and noted that she started a program for conducting physical examinations for corporate employees at the hospital in the 1980s.

He said that Ohio Valley has not used her mystery shopping service, though “it makes a lot of sense. When you’re up in management, you don’t always see things the way the patient sees them.”

In 1987, Ms. Gerber left the hospital to establish her own company, initially focusing on occupational health and long-term care. Though she and her husband moved to California more than a decade ago, she still works with several associates in Pittsburgh.

Ms. Gerber said about two or three hospitals seek her mystery shopping services each year.

Demand is not greater, in part, because hospitals have other priorities and often “are very paternalistic,” she said. “The patient doesn’t have much control, and I think hospitals are reluctant to relinquish some of that.”

Part of the reluctance also is due to a misunderstanding of how mystery shopping can increase patient satisfaction, she said. Some hospital officials are concerned that some of their employees may feel they are being spied upon, she said.

“In the hospital industry where mystery shopping is uncommon, it can still be perceived negatively by staff.”



# Taking the Mystery out of Mystery Shopping

**W**henever the term “mystery shopper” is mentioned, we’ve discovered that it often inspires one of two strong reactions: immediate interest or on-the-spot suspicion.

But, whether you love or hate the concept, use of mystery shoppers posing as patients is growing in popularity among health care providers, and it’s important to understand what it can (and can’t) do for your organiza-

tion. For example, it’s not a quick-fix way to identify a practice’s marketing or “customer” service woes.

**Reports by objective, trained mystery shoppers, and regularly taking a close-up look at staff, systems, and environment can be a powerful tool that complements current methods of assessing and increasing patient satisfaction and improving quality.**

Nor is it, as some employees fear, a cleverly covert way for managers to achieve their hidden agenda.

Regular use of a mystery shopper is an enlightening and surprisingly affordable way to help improve patient satisfaction; improve systems; determine if staff members are following certain procedures; assess a staff’s responsiveness; and determine how well information is being communicated to patients. It has the added benefits of enhancing your image and keeping staff on their toes.

Using a mystery shopper often begins with scheduling and registration and continues with examination by the doctor and diagnostic testing. It concludes when the mystery shopper reports on good and bad treatment, along with special occasions of kindness, caring, and responsiveness. In some instances, the mystery shopper describes adherence (or lack of) to standards, procedures, and protocols and makes suggestions for improving systems that interfere with efficient or patient-friendly treatment.

Occasionally, investigation can be carried right up to the moment before surgery. For example, during a visit to a hospital, one mystery shopper was being prepared for surgery when the doctor canceled the case because the “patient” had drunk orange juice that morning. Only the doctor and senior management for the hospital knew that the mystery shopper was working undercover for the hospital. The mystery shopper documented and reported on every step of her treatment from the time arrangements were made for the outpatient surgery up to the moment it was canceled.

## A NEW Application for an Old Technique

**Most people associate the term “mystery shopping” (a well-established marketing research technique) with the retail, banking, or hospitality industries, where individuals, posing as customers, evaluate stores, banks, hotels, etc., on a variety of customer service and sales criteria. The goal is to make changes for improvement and increase customer satisfaction and retention.**

**The mystery shopping technique can be successfully applied to health care, too. individuals, posing “as patients (sometimes called “secret patients”), objectively evaluate hospitals, medical practices, HMOs, and clinics-in detail – on a variety of service and systems criteria. The goal is to make changes for improvement and to increase patient satisfaction and retention.**

— B.G.

BY BARBARA GERBER

If you're wondering how using a mystery shopper will fit into your patient satisfaction, quality monitoring, and image enhancement activities, the following suggestions should help "demystify" the mystery shopper experience for the first time user-and perhaps even raise a few new ideas for the experienced user, too.

**1. Be realistic in your expectations.** Imagine a mystery shopper's report as an instant snapshot of one part of your practice, clinic, or HMO at a specific point in time. Polaroid photos don't always capture us looking our best, but they do capture the immediacy of the moment: they're a slice of life, full of emotion, vitality, and reality. The best shots are the ones you take close-up: panoramic shots are too small and distorted to be effective.

That's also what a mystery shopper does best: it's an intimate, very human, close-up look at the people, service, systems, and the environment encountered by patients and their families who come to your office or facility. Conversely, use of a mystery shopper is not meant to be a comprehensive look at your practice or organization as a whole, nor an in-depth employee evaluation (remember, it's a slice of life). While using a mystery shopper can help you identify a potential problem area, it's not designed to measure consistency of performance-unless it is done on a very regular, frequent basis.

Using a mystery shopper lets you see how you're performing at a given time, in detail and what messages of professionalism, responsiveness, sensitivity, caring, patient interest, and quality are being communicated. But just as you wouldn't base an entire new treatment regimen on the findings of one study, mystery shoppers should never be the only vehicle used in making critical operational decisions.

**2. Be clear-but creative-in your goals.** Many people think of mystery shoppers merely as a marketing tool for evaluating patient satisfaction or "customer" service. Its fundamental principles, however, make it remarkably useful for gathering intelligence for a variety of other projects, such as:

- Monitoring whether the proper information is being given out to members of an HMO

- Identifying the need for diversity training in an organization
- Checking adherence to standards, protocols, procedures, etc.
- Monitoring the communication of instructions to patients
- Investigating how prospective employees are treated on interviews

Mystery shoppers can capture information on subjects you might not feel comfortable asking on a patient questionnaire. It can help identify or confirm suspected problem areas and even assist in prioritizing future actions from the patient's point of view.

Another real value of using mystery shoppers is that it documents the immediate experience: it conveys "this is how I'm feeling right now." With mystery shoppers, each moment is recorded as it happens-unlike patient surveys, where people often forget what happened over the passage of time or decide not to reveal a negative experience. Using mystery shoppers also eliminates the fear that some patients have about confronting the doctor with a complaint about their experience or treatment.

A real example is a man who went to his new HMO doctor for the first time. The patient later told a number of friends that the front office people were fighting with each other when they couldn't find his records. He also commented that the waiting room looked dirty, which made him wonder about the overall cleanliness of the office. The patient said he liked the doctor when he finally saw him, but the first impression had made him want to leave and never return. However, he told friends that he would never have mentioned his complaints to the doctor.

**3. Decide-in advance-when and whom to tell.** In nearly every case, mystery shoppers bring both good and bad news. One of the most frequent questions we receive is "Should I tell the staff they'll be observed? Even more importantly, should I tell them what I saw?"

It's a question that deters some doctors and managers who worry about the risk management (read: legal) implications of using a mystery shopper from adding it to their quality monitoring palette. Although each communication decision should be made on a case-by-case basis, we sometimes advise that employees not be told about the first mystery shopper engagement-before it is conducted-until a decision is made to use mystery shoppers on a routine basis.

## SUGGESTED READING LIST

◆  
*The Healthcare Customer  
Service Revolution: The  
Growing Impact of  
Managed Care on Patient  
Satisfaction*

By David & Peggy Zimmerman  
and Charles Lund  
Irwin Professional Publishing/  
Healthcare Financial Management  
Association, 1996

Once the decision is made to go forward with mystery shoppers on a regular basis, however, employees should be advised of the service and receive detailed feedback on the results. Employees should also be told that they will be expected to review and respond to the mystery shopper report and/or act upon the results. In most cases, employees will eventually formally "authorize" the service as they see that it leads to improvements, and in many cases, individual recognition and praise for good service.

#### 4. Begin benchmarking.

just as you can look through a family photo album and see its members change and grow over a period of years, a consistent program of mystery shopping allows you to see real patterns of progress and improvement within an individual department, office, or clinic, or across multiple departments, offices, and clinics.

Never approach your first mystery shopping experience with the thought that it will be your last. To be effective, it should be incorporated as an ongoing part of your patient satisfaction and quality monitoring program. The information you collect during each encounter lets you identify and compare areas for future improvement, both on a long-term and short-term basis. Depending on the nature and goals of your mystery shopper project, the need for repeat visits or calls can be as infrequent as every six months-or as often as several times a month.

#### 5. Choose your mystery shopper firm carefully.

In choosing a qualified mystery shopper firm, you should first and foremost look for an organization that will respect and protect your privacy and reputation. Intelligence, excellent powers of observation, and a concern for detail are also important qualities for the individual mystery shopper-as well as a strong sense of ethics and objectivity. But there must also be the desire and ability to learn a role and act a part. In certain cases, a mystery shopper with a health care background can be helpful. Find a firm that inspires your trust and confidence and which has experience in the health care field. Don't hesitate to ask in-depth questions about the background and training of the individual mystery shopper, too. You're depending on your mystery shopper to know what to look for and be able to record it as accurately and comprehensively as possible.

Your mystery shopper firm should also be willing to develop a very tailored program designed to address your specific needs. Working together, you can develop the format, recording methods, and report structure that best suits your needs.

## CONCLUSION

Competition for patients will be even greater in the future. If patients (or employers, for that matter) don't feel attention to their needs, they may go somewhere else. For this reason, it appears to be more important than ever for doctors and managers to know how patients really feel about their medical encounters, and to learn what systems and procedures are not working as they should. Reports by objective, trained mystery shoppers, and regularly taking a close-up look at staff, systems, and environment can be a powerful tool that complements current methods of assessing and increasing patient satisfaction and improving quality.

**Barbara Gerber** is president of Devon Hill Associates, a La Jolla, California health care and long-term care market firm that offers mystery shopping services to hospitals, clinics, physician offices, HMOs, nursing homes, and assisted living and retirement communities nationwide.



# Under <sup>the</sup> Covers <sup>of</sup> Healthcare





## By taking the trepidation out of transparency, these healthcare professionals found a way to improve patient satisfaction.

A patient walks into a San Diego-based hospital expecting to receive preoperative instructions, but because of a language barrier she walks away with little or no information. Halfway across the country, another patient checks into a Texas hospital's ED complaining of fainting spells. The night staff performs the necessary tests and admits the patient. However, without a private room, the patient spends a sleepless evening while another patient coughs and hacks all night long.

Sound like bad jokes? They're not. But the healthcare administrators receiving such feedback after inviting mystery shoppers into their facilities wish they were. In the case of the preoperative Spanish-speaking patient, the hospital's administrator, Britt Berrett, was on a mission to develop service standards and improve customer satisfaction scores for his 300-bed community facility. It's been more than 10 years since that experience, and Berrett still remembers the shock he felt when reading the shopper's report. "It was disturbing," he said. "Patient care was compromised because of the inability to communicate and the frustration of the physician."

In the case of the ED insomniac, the feedback was Berrett's. He had been appointed president and CEO to Medical City Hospital in Dallas only days earlier, but the results of his overnight stay instigated his second encounter with mystery shopping. "A tremendous amount goes on behind the scenes that administrators don't see," he said. "Sometimes we forget the newness patients experience on a daily basis."

It was that sentiment that prompted Barbara Gerber, founder and president of Devon Hill Associates, to develop her own mystery shopper program more than 20 years ago. Previously an assistant administrator and director of marketing, Gerber had vast experience with occupational health consulting. She also had a nursing home administrator's license and, with associate Bill Neff, had begun sales training for administrators on the long-term-care side of the healthcare industry.

"That's really how the mystery shopping started. As part of the sales training, I went into the facilities and pretended I was looking for a home for a family member," she said. "I would then go back to the administration with firsthand knowledge of how I was treated."



Years later, as she was lying in a hospital bed after an abysmal experience of her own, Gerber realized the skills she'd developed could be useful to healthcare administrators industry-wide. As the consumerism of healthcare increases, mystery shoppers provide these organizations with the answers they're looking for, and sometimes more.

"Hospitals want confirmation that they're doing the right thing," Berrett said. "What they find out is, despite their best efforts, more needs to be done. Although in both cases we walked into this thinking we had our acts together, knew what we were doing, and were moving in the right direction, we concluded from the results that we weren't as far down the road as we needed to be."

### Digging deeper

Although mystery shopping is not intended to replace a hospital's customer and patient satisfaction initiatives, it is intended to provide information most administrators don't have the time to find on their own. For California HealthCare Foundation (CHCF), a nonprofit and independent philanthropy focused on improving healthcare delivery across the state, mystery shoppers did just that. When the organization hired Devon Hill Associates, California had just signed into law the Payers' Bill of Rights requiring hospitals to adequately post and provide financial information for consumers on a variety of procedures.



## Devil's advocates

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“As people become more responsible for a greater percentage of the healthcare costs through high deductible health plans or additional consumer engagement in health plans, we wanted to know if they had the information available to them to shop,” said Maribeth Shannon, director, market and policy monitor program at CHCF. “We were testing to see whether or not hospitals had adapted and if it was possible for consumers to get prices when they needed them.”

Confidentiality regulations prevented the organization from following actual consumers through the healthcare process, and sending price inquiry letters to each of the 350-plus hospitals in California seemed to miss the point. Even after zeroing in on mystery shopping, CHCF wasn't sure the standard mystery shopping procedures were appropriate.

“We were concerned about imposing on the hospitals,” Shannon said. “If we're concerned about access to healthcare resources, why would we create artificial contacts within the systems? As a result, we only looked at what the quotes were and if consumers could get information. We didn't investigate if the providers follow through on the billing end.”

Over a six-month period, Gerber and her team of “shoppers” had made more than 622 calls and visits to the 64 hospitals surveyed, making it Devon Hill Associates' largest project to date. The study uncovered where the hospitals' processes were falling apart. In some cases, the hospital had only appointed one person to handle all pricing quotes. If the consumer didn't know how to get to that person and the front line of the hospital wasn't trained to direct consumers accordingly, the whole system fell apart.

According to Shannon, for the most part, all surveyed hospitals had holes in their processes. Although many called to thank CHCF for the feedback, many were shocked with the findings. “They thought they had the right procedures in place to address these questions because the legislation was in place,” she said. “The feedback we got from hospitals was ‘We see where the problems are, and we're working on it.’ They hadn't realized there were holes in their system.”

### Pushing transparency

When Berrett received Medical City Hospital's results, he also opted to share. Although he's been in other organizations in which the administration was unwilling or embarrassed to share the results of the patient satisfaction surveys, he believes sharing the results of such a process is imperative but must be handled with kid gloves. “Sometimes it's hurtful, challenging, and difficult to have someone say you're not as good as you thought you were, and that's tough. But cowboy up, embrace the issues, and move forward. For the mystery shopper program to be effective, the results must be shared in an environment of trust and respect with everyone involved.”

For those out there who consider the thousands of dollars and numerous hours healthcare institutions spend enlisting secret shopper agencies a waste, Berrett has another strong message: you're just scared. “It's cowardly to say you can't do it because that patient bed could otherwise be used during the same time period. Devil's advocates out there fail to understand the intimate nature of the healthcare experience by using a mystery shopper. We've become much more attuned to what that patient experience is.”

Medical City Hospital's results speak for themselves. In 2000, the organization ranked in the double digits for overall performance amongst the 190 hospitals that comprise the HCA (Hospital Corporation of America) family. Today, the hospital is number one. But although the mystery shopper program did instigate a number of changes across the organization, including an eight-year, \$290 million phasing construction project that gave the organization's 660 beds private rooms, Berrett said mystery shopper programs should not replace a hospital's other customer service and patient satisfaction initiatives. Mystery shopping represents another level of commitment to ensuring an excellent patient experience.

“Patients can access the Web and explore their specific healthcare issue,” he said. “They can also evaluate hospitals, and soon physicians, on efficiency. With the amount of information consumers can access, we need a culture of transparency. Mystery shoppers, for the hospital administrator, push that transparency.” ☰

—Amanda Gaines

# San Francisco Chronicle

## Mystery shoppers' work can be good for what ails you They pose as patients to give hospitals the full treatment

Victoria Colliver, Chronicle Staff Writer  
Sunday, September 17, 2006

*Reprinted from the San Francisco Chronicle*

"Jason" had done his research and knew exactly what symptoms would send him straight to the emergency department.

"Faking a head injury, it really gives you an opportunity to ham it up a little bit," said Jason, a Southern California professional in his 30s who declined to give his name. His ruse got him a CT scan.

Jason is not a hypochondriac, nor does he suffer from Munchausen syndrome, a disorder in which people fake illnesses to elicit attention. Instead, he's a "mystery shopper," an undercover consumer hired by health care providers to feign illness or injury. They do so to evaluate how well hospitals treat patients.

In the case of the phony head injury, Jason kept up his pose until a concerned emergency doctor wanted him to submit to further "potentially painful" tests.

"I had to think on my feet and think, God, do I want to go through this?" he said. "Ultimately, I refused treatment."

By that time, he had the information he needed.

The practice of mystery shopping is well known in the retail industry. It's used by department stores, restaurants, hotels and other businesses to fine-tune service and attract customers.

As hospitals and other facilities have come under increasing scrutiny, more health care organizations are turning to mystery shoppers to learn how they can better satisfy patients and improve their reputations.

Devon Hill Associates of San Diego is one of few companies nationwide that specializes in medical mystery shopping.

The firm's founder and president, Barbara Gerber, regularly poses as a patient and recruits others, like Jason, to surreptitiously observe medical professionals, checking for flaws as well as good practices that could make a

patient's experience more comfortable and improve the quality of medical care.

"Hospitals see the world changing around them and there's more of (an) emphasis on quality and customer service," said Gerber, a former hospital administrator who has been conducting mystery patient visits for 10 years. She said demand for her business has increased in the past year or two.

While one can imagine the allure of pretending to be a real customer at, say, a nice restaurant or a golf course, why would someone voluntarily spend hours in a hospital waiting room — let alone submit to unpleasant scans, blood tests and examinations?

Gerber, who has undergone tests that have taken her to the point of being wheeled into the operating room, said her "shoppers" are motivated by wanting to improve health care services. She screens out anyone who appears to have an agenda, such as wanting to retaliate for poor medical treatment.

"When it comes down to simulating an illness and going through an examination, it takes sort of (a) special person," she said.

Most of the visits are routine and involve basic diagnostic testing, she said. Often, a doctor is "in on" the mystery visit because the point is not to check the medical care per se, but to see how hospital staff members — from the front desk to the pharmacy — interact with the patient.

Devon Hill's clients are typically hospitals and long-term care facilities. They pay between \$10,000 and \$40,000 for the firm's services.

The California HealthCare Foundation, an Oakland health philanthropy, commissioned Devon Hill mystery shoppers to pose as uninsured patients asking hospitals about the costs of

specific procedures. The study — which involved 64 hospitals statewide — required 622 calls and visits, the most the firm has ever handled.

The foundation opted against having fictitious uninsured patients undergo medical treatment, said Maribeth Shannon, director of the foundation's hospitals and nursing homes program. Shannon said the foundation was concerned about adding unnecessary procedures and bills to an already overburdened health system.

Gerber said hospital officials sometimes raise ethical issues about mystery patients getting unnecessary treatment, especially in emergency departments, potentially taking the place of patients who genuinely need care.

She maintains that hospitals generally can absorb three to five mystery visits without compromising care for others. What's more, she says her shoppers' supposed injuries are never severe enough to take priority over patients with serious traumas.

Gerber said "patient" visits are just part of the job. Writing meticulous reports about the experience can be even more time consuming.

"It was very, very interesting to hear from the mystery shopper their perspective of lying in a patient bed and spending the night," said Zoe Rodriguez, who hired Devon Hill to carry out a series of mystery visits when she worked at Southern New Jersey's Burdette Tomlin Memorial Hospital.

Rodriguez, who now works as the director of laboratories at Kennedy Health System in Cherry Hill, N.J., said Gerber's reports were extremely detailed — noting stains on the waiting room furniture, how staff members dressed and whether they addressed patients by their first names.

Based on the report, the hospital made a

number of changes, such as changing the waiting-room system and rescheduling some night-time duties that woke patients up.

“In health care, the consumer is getting very savvy,” Rodriguez said. “Patients have the opportunity and ability today to make informed decisions and select where they want to receive care.”

To gather detailed observations, Gerber’s network of sleuths must find ways to note their impressions without drawing attention. Sometimes that involves covert recordings. While California does not allow tape recording without the consent of all parties, some states require that only one party be aware.

“Everybody who does this gets a little nervous,” Gerber said. “They’re nervous because they have to act. They’re a little bit nervous because they’re afraid someone will pick out who they are and they won’t be able to carry it off.”

Jason, who has a full-time job, conducts mystery visits on his own time. Because hospital workers are not expecting “fake”

patients, he doesn’t expect to get caught, he said. He commits his observations to memory, noting that he is good at recalling details. Sometimes he calls his voice mail to leave information.

“Joan,” 64, another mystery shopper, said she take notes in newspapers or crossword puzzles. Sometimes she slips into a restroom to jot down information.

Joan, a resident of a southwestern state, said she and her husband, who are both retired, segued into the medical field after doing mystery shopping at other locations, such as restaurants.

Gerber won’t divulge how much she pays her “shoppers.” Joan said medical visits pay better than other forms of mystery shopping. Still, she isn’t doing it for the money.

“If you break it down for the fact you’re away from home for two or three days and spend two or three days writing reports ... you’re probably making 25 cents an hour,” she said.

Joan said she likes playing a role and helping hospitals improve the patient experience. If the hospital is out of state,

Joan said she and her husband can enjoy a free trip and hotel stay.

While her husband has undergone blood and imaging tests, Joan said she has not had to endure anything more extensive than an X-ray when she limped into an emergency room in a California hospital.

“In that particular case, one of the things I found was I was left in a room without a lot of explanation about what was going to happen next or when,” she said. “As a patient, that can not only be frustrating and irritating, but, if you’re really sick, that could be frightening.”

Joan is planning her next “visit,” which will be to an out-of-state hospital. She won’t reveal any details. This next job will involve a complex scenario, but Joan isn’t worried.

“We come up with a specific ailment to see how they (hospital staff members) handle it, but we don’t have to have our appendix out,” she said.

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