



# The First Phone Call – Where Marketing Plans Die in 4 Seconds Flat

Carolyn Cook, Director of Service Excellence, **MedStar Medical Group**

Kristin Baird, **President/CEO, Baird Group**



# What We'll Cover



Explore common provider perspectives on patient experience, including popular measurement tools and why they frequently object to the methods used



Examine how observational research harvests stories rich in facts and feelings that shed new light on why patients rate you the way they do



Hear case examples of how leaders use mystery shopping data to engage providers in real solutions that elevate the patient experience



Explore types of mystery shopping and how they uncover the true experience and lead to positive change

# MedStar Medical Group...by the numbers.

A clinical and operational cornerstone of the MedStar Health Distributed Care Delivery Network

## Employed providers

**4,026** employed providers\*

2,540 employed physicians

1,486 advanced practice clinicians



**38** system and regional service lines

One of the **largest medical groups in the country**



**3.8 million** patient visits\*\* annually

**13 million** wRVUs\*\*\*



More than **300 sites of care**, covering more than **85 zip codes**



Hospital-based



Telehealth



Ambulatory



Home Care



More than **1,000 providers** covering acute care across 10 system hospitals



More than **1,150 residents and fellows**

**100** residency and fellowship programs



Supported by **1,500 MedStar Health provider teaching faculty**



More than **850 providers** holding faculty appointments at Georgetown University



More than **400 physicians** engaged in research



More than **1,000 research papers** published per year

\*Source: PeopleSoft and ECHO as of September 2022; does not include residents and fellows

\*\*Source: IDX – FY 2022

\*\*\*Source: FY 2022 UHC RVUs

Version September 2022

 MedStar Health

**SHSMD**

Society for Health Care Strategy & Market Development™

# The Challenge: Create a world-class medical group



Financial Success & Delivering on the promise of  
Our Distributed Care Delivery Network

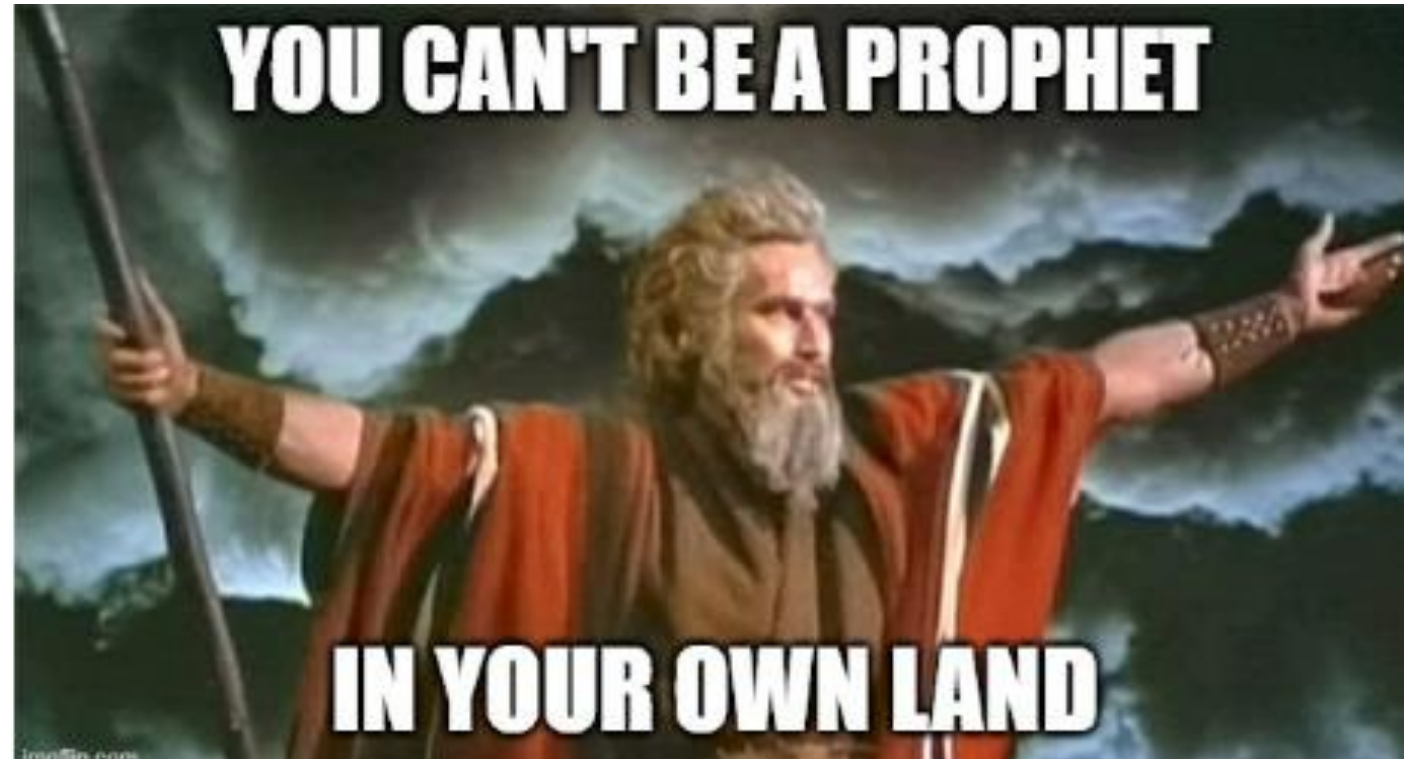
# Measure to Validate & Inspire Action



# Build or buy?

- Homegrown mystery shopping
  - No action
  - No credibility with staff or providers
  - Data was not clear
  - Lag time
  - MMG too big to scale that program (even if we wanted to...which we didn't!)

# Two Elements at Play





- Quality piece was missing
- Needed outside expertise to boost credibility and inspire action
- Not just ring time, talk time and abandonment rate – empathy, listening, service excellence
- Access to what they called for
- Feedback in a timely manner



# Baird Group





**And this is what they get...**



# Undone from Day One<sup>®</sup>

If we lose them here,  
we won't get them back!

# It's how we treat people



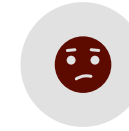
Courtesy



Friendliness



Knowledge



Concern



Were needs met?



Were questions answered?



Appointment access



Options offered?

 MedStar Health

**New year.  
Fresh commitment  
to your health.**

We make it easy with convenient, compassionate primary care close to home.

Book an appointment now.  
Visit [Access.MedStarHealth.org](https://www.accessmedstarhealth.org) or call today.



**Health care at your fingertips.**  
From appointment requests and refills to secure physician messaging, our app makes managing your health easy. Visit [Access.MedStarHealth.org](https://www.accessmedstarhealth.org).



**Sick care with flexible scheduling** when you need it most.



**Expert care** for individuals and families.



**Urgent care** when and where you need it. Whether it's late nights or weekends, in person or eVisit, we've got you covered.



**Coordinated care**, including access to the entire MedStar Health network.



**Partners in prevention**, helping you stay healthy.

 MedStar Health

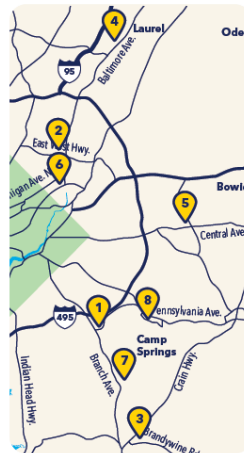
10980 Grantchester Way  
Columbia, MD 21044

"I had a great experience at this office. Everyone was knowledgeable, competent, and welcoming. I look forward to coming back."

-Sarah T., MedStar Health patient

**It's how we  
treat people.**

To learn more about our physicians and practices near you, or to request an appointment, visit [MedStarHealth.org/PrinceGeorges](https://www.accessmedstarhealth.org/PrinceGeorges).



Conveniently located near you.

- 1 MedStar Medical Group at Camp Springs**  
5801 Allentown Rd., Ste. 510  
Camp Springs, MD 20746  
P 301-899-0020
- 2 MedStar Medical Group at Hyattsville**  
6401 America Blvd., Ste. 203  
Hyattsville, MD 20782  
P 301-209-5480
- 3 MedStar Medical Group at MedStar Health at Brandywine**  
13950 Brandywine Rd, Ste. 125  
Brandywine, MD 20613  
P 301-782-2220
- 4 MedStar Medical Group at Laurel Internal Medicine**  
13952 Baltimore Ave.  
Laurel, MD 20707  
P 301-490-1990
- 5 MedStar Medical Group at Mitchellville**  
12158 Central Ave.  
Mitchellville, MD 20721  
P 301-430-2750
- 6 MedStar Medical Group Family Medicine at Fort Lincoln**  
4151 Bladensburg Rd.  
Colmar Manor, MD 20722  
P 301-699-7700
- 7 MedStar Medical Group Primary Care at Clinton**  
10403 Hospital Dr., Ste. 103  
Clinton, MD 20735  
P 301-877-4210
- 8 MedStar Medical Group Primary Care at Upper Marlboro**  
9440 Marlboro Pike, Ste. 200  
Upper Marlboro, MD 20772  
P 301-952-8614

NON PROFIT ORG.  
U.S. POSTAGE  
PAID  
MVPRINT

 Society for Health Care Strategy & Market Development™



# THE POWER OF THE FIRST PHONE CALL

2023

**13,245 calls**

**First-time callers**

**32 U.S. markets**





**38%**

**OF FIRST TIME CALLERS SAY THEY ARE NOT LIKELY TO BECOME PATIENTS OR RECOMMEND THE PRACTICE BASED ON THEIR INITIAL CALL.**



**3%**

increase  
since 2016

**SHSMD**

Society for Health Care  
Strategy & Market  
Development™



---

## Methodology that stands up to scrutiny

- Ethical and operational considerations
- No fake appointments
- Sample size
- Gather facts AND feelings

# It's the consumer's story that inspires action

The attendant was extremely courteous and very friendly

She didn't ask me any questions, which made me think she didn't care."

The attendant was very empathetic and caring throughout the call. She made me feel understood and cared for

I felt disappointed that the appointment was months away.

She was knowledgeable and helpful. She answered my question with no problem. I felt confident that I could ask her any question."

The attendant had a very poor closing. She just hung up.

- Considerate of caller's time
- Friendly
- Empathy/Caring



- Appointment Access
- Sincere Interest
- Reach live attendant

# Baird Mystery Shopping Basics

- Participation based on Medical Practice Survey results for *Ease of Contacting* and *Staff Treat with Respect and Compassion*
- Strategic service line practices performing below the MMG average in both these dimensions are included
- Practices must be accepting new patients

# Mystery Shopping Phases

## Phase 1

- February – June
- 52 Practices
- 12 Practices improved above MMG average and were not included in the next phase

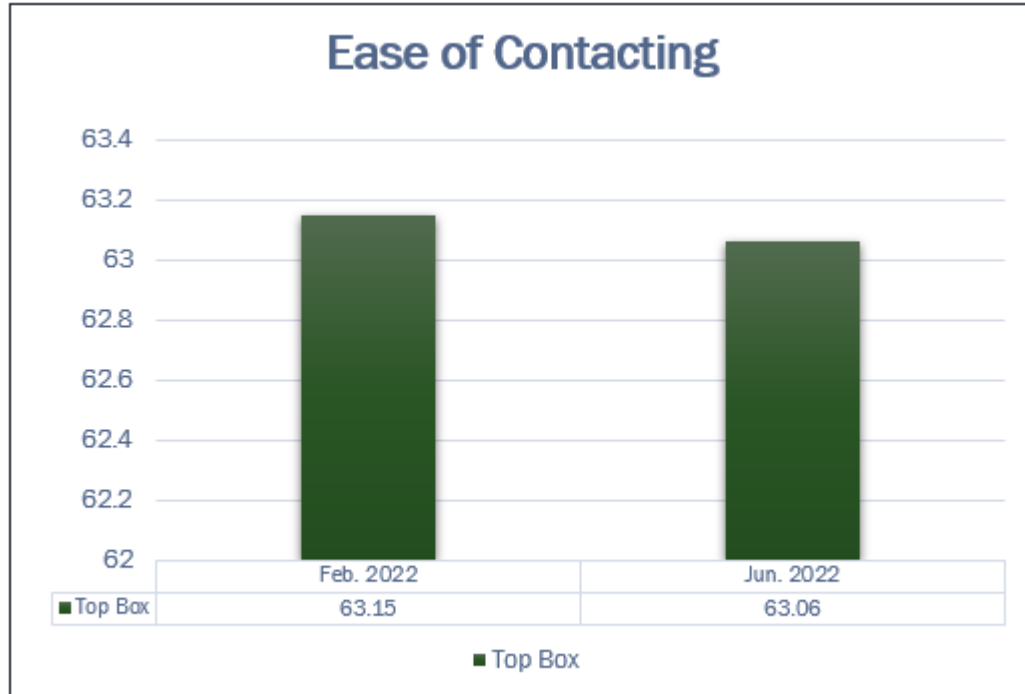
## Phase 2

- August – December
- 54 Practices
- 14 Practices improved above MMG average and will not be included in the next phase

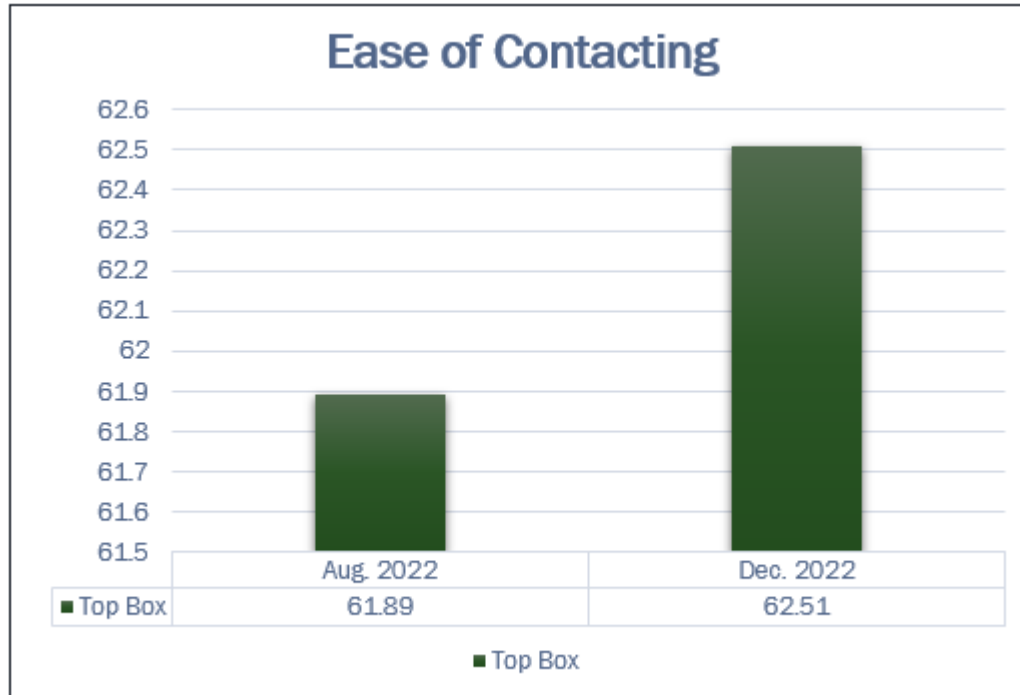
## Phase 3

- March – June
- 57 Practices
- 10 Practices improved above MMG average and will not be included in the next phase

# Phase 1

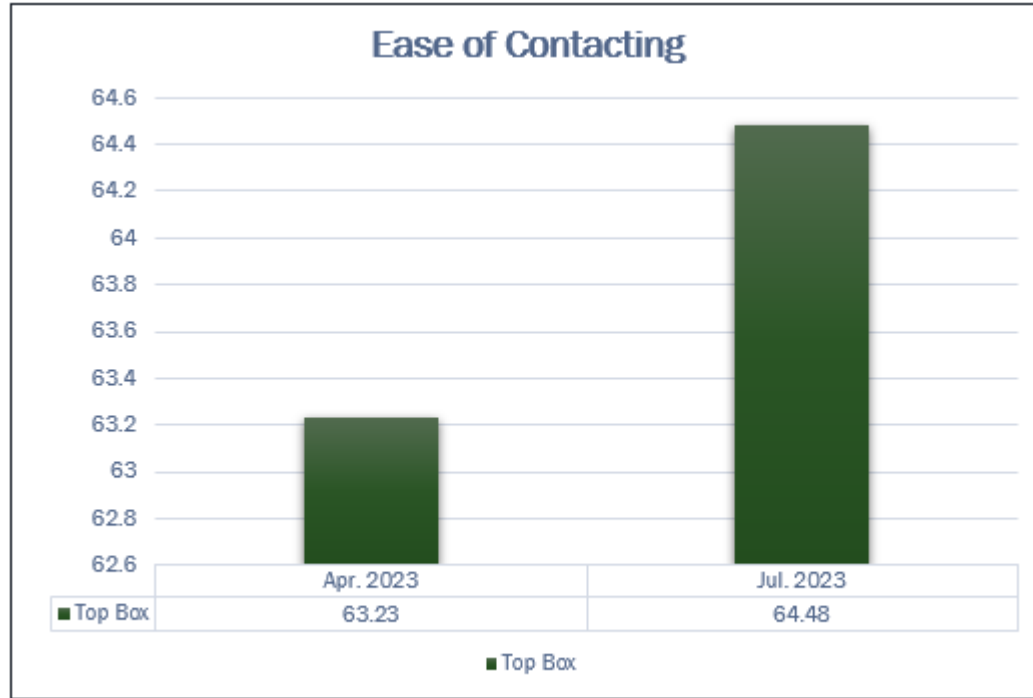


# Phase 2





# Phase 3



# Baird Group Overall Result



# Where data is shown, improvement follows

Data created action  
AND resources

Expanding call center  
– Leaders have a case

Moving FTEs

Helped get request to  
recruit

Concrete information  
about what  
consumers will  
tolerate for wait time

Uncovered unknown  
process issues (frozen  
slot)

Let go of template

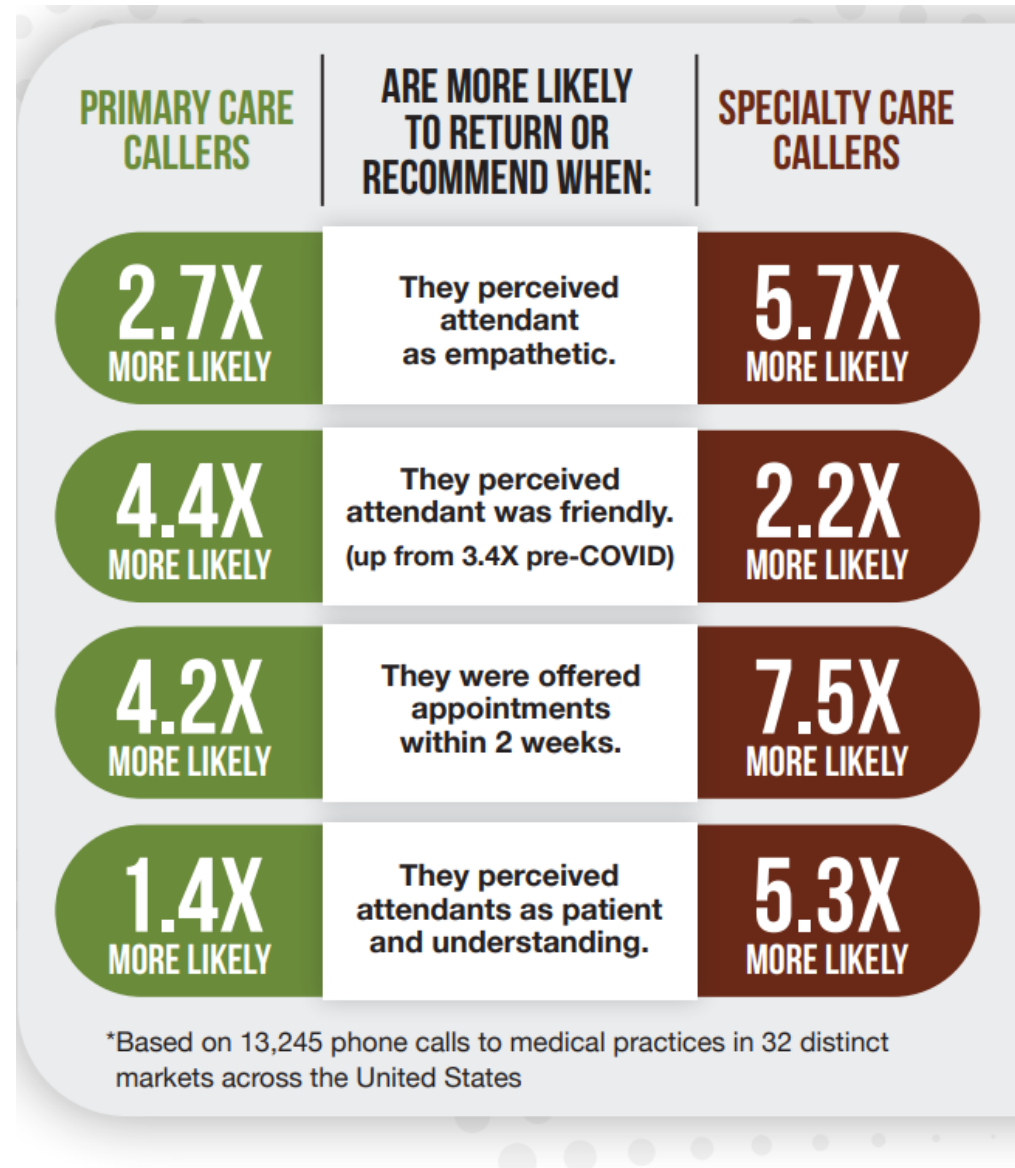
Patient satisfaction  
improved

# Correlations

- Closing: warmth & friendliness
- Empathy and caring
- Appointment access



# What matters most in primary and specialty care



# Big Takeaways



Staff knows the phone experience is a priority

Identify where recruitment is essential and build buy in

Clearer about access issues and where more resources are needed

Physicians more open to give up templates

Managers engage in real-time coaching



# Brené Brown

*“Vulnerability is the birthplace of innovation, creativity and change.”*



# Questions?

Please be sure to complete the session evaluation!





# Kris Baird

- President/CEO of the Baird Group
- [kris@baird-group.com](mailto:kris@baird-group.com)
- 920 650 7937

Kristin Baird is a culture catalyst. A registered nurse and former healthcare marketing executive for two Wisconsin systems, she is the founder of Baird Group, a consulting firm focused on creating engaged, high-performing cultures. Baird blends her clinical, leadership, marketing, and communication skills to help organizations and their leaders achieve their optimal performance.

Baird is the author of five books and hundreds of articles on culture, leadership, engagement, and patient experience. Her blended learning course, *Be the Leader Nobody Wants to Leave: 8 Skill-Builders for Busy Leaders*, is earning international accolades for increasing employee engagement and retention by building essential leadership skills.

# Carolyn Cook

- Director of Service Excellence, Medstar Medical Group
- [Carolyn.m.cook@medstar.net](mailto:Carolyn.m.cook@medstar.net)