In-Office Surveys to Measure Patient Satisfaction:
Keeping Your Fingers on Your Patient's Pulse

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If you're serious about understanding your patients, fine-tuning service and improving patient relations, an in-office survey is a terrific place to start.

- **Are you willing to ask the questions?**
- **Are you brave enough to listen!**
- **Will you act on patient feedback?**

How do you know if your patients are happy or dissatisfied with your practice? "Oh, they tell us", you say! I highly doubt that patients tell you all the nuances of how they really feel about your office. A patient in one of our focus groups complained about the doctor's chair side manner. Even though I knew what his response would be, I asked the patient, "Did you ever tell the doctor how you felt?" He responded, "No way, the doctor's the one with the sharp instruments in his hands and besides, it wouldn't make any difference – he wouldn't change." And that pretty much is the attitude most patients have. If they complain to anyone, it is usually to the assistant or the business staff. It's too uncomfortable for them to be direct about their feelings when it comes to healthcare providers.

If you want to know – you have to ask!
So it's up to you to ask … in a manner that is comfortable for the patient. One method of gathering feedback is through patient surveys. These surveys could be managed by a consultant, an outside survey service, online or in-house. Conducting a survey in-house can be the most cost-effective method but it depends on how it is handled. If you mail the surveys to patients, expect postage to be costly and expect a lower rate of return than if you have the patient complete the survey while they are in the office.

An in-office survey provides an ear to your patients in a low cost way while ensuring patient anonymity.

The method that follows is highly cost-effective and has a high response rate. The concept comes from the hospitality industry. You've seen the surveys that are provided in hotels, both in the hotel room and at the checkout counter. Take your cues from these surveys - however be more proactive on soliciting patient participation. I'll address the method of distribution and use first. At the close of this article I'll suggest survey design.

Logistics of survey paperwork
The first thing you need is a box with a slot in it – the idea being similar to a mail box slot into which the completed survey will be placed by the patient. Ideally you'll get a box with a highly-visible lock on the front of it. The lock is important because it says to the patient, "Your survey has a degree of anonymity because it is mixed with other completed surveys and is not readily opened immediately after you leave the office!" Then position the box near the door of the practice, away from the front desk. Where it is located also influences the perceptions of anonymity.

The surveys will be disseminated by the team at the front desk. You may have one survey that is used for all patients. Alternatively, you may have different surveys for different patients or services. The business staff may provide hygiene patients with a specially designed survey just for hygiene patients. You may have a different survey for new patients as compared to long-term patients of record. You may even have a specialized survey for patients responding to an advertisement or patients of special services. Whatever the case may be, the appropriate survey will be chosen by the business staff member and handed to the patient. If you have several different surveys, they should be placed in an area that is accessible to staff but unseen to patient. They needn't know that you are surveying different issues.

Determination of the appropriate survey may be made at the time the patient returns to the front desk after treatment. It may also be determined in advance of the patient's arrival – in this case, the survey may be placed inside the chart so that the business staff does not have to look for the appropriate one while the patient waits.

Requesting survey completion

The survey will be provided to the patient on conclusion of the clinical service or treatment. The assistant or hygienist who walks the patient to the front desk may ask the patient to complete the survey prior to the patient reaching the front desk, "We're conducting a very short survey of patients to learn what we can do to better serve you. The survey is anonymous and we'd really appreciate it if you'd be willing to participate … " Or the business staff may provide the survey to the patient, "While I'm preparing your statement, would you take just 30 seconds to complete a 5-question patient satisfaction survey? Please don't sign it, we want it to be anonymous and we want patients' honest feedback on what we can do to better serve you. When you're through, please fold it and drop it in the lock box by the door."

How do you use these surveys?

Then advise the patient what you do with the surveys. The patient wants to know that the survey will be taken seriously and have some genuine significance. They don't want to think that a survey is an empty promise that "you care." Once you have the patient's agreement, hand the patient the form along with a pen. Then follow with something like this, "We open the box once a week [or whatever frequency you decide]. We review all patient feedback and we look at how we can fine-tune our service. Then we make changes accordingly." If you produce a newsletter, or if you have a website, you could add, "You'll be able to read about the impact of the surveys in our newsletter or on our website." No matter how you state it, it's important that patients know they will be heard and that you take their comments seriously. If they never see any changes or if they think the survey is a promo gimmick, then all your efforts are meaningless and could work against you.

When the patient has agreed to complete the survey, be sure to thank the patient sincerely.

The Spoken and Unspoken Messages

Here's how the message is sent, both in the verbal message and what the underlying message really is:

Spoken words	Unspoken message:
"While I'm preparing your statement …"	This will take no extra time … you'd be standing here anyway
"just 30 seconds"	This is very short
"5-question"	Again … very short
"Patient satisfaction"	This is our concern – we want to ensure you are satisfied here
"don't sign it … anonymous"	We don't want to know who said what, we just want feedback
"…serve you better."	We want to continue to improve
"… fold it"	People think there is greater anonymity when a survey is folded, "hiding" their responses
" … lock box …"	The lock implies that team members don't look at surveys immediately after patient departs!
"… by the door"	The farther away from the eyes of the business staff, the better in the patient's mind
" … open the box [state frequency]"	We don't open it immediately after you leave – and your survey will be mixed in with others
"…we make changes accordingly."	This is not cheap talk – we really pay attention and adjust as is possible.
" … read about the surveys"	We take it seriously enough to let patients know the survey outcomes

What will you REALLY do with the surveys?

Determine the frequency of survey evaluation. If you have regular weekly or monthly meetings, this is an ideal time to evaluate patient feedback.

Select two people to open the box and tally the surveys. Ideally you'll have one business person and one clinical person do this together. It's a good idea to have different people do it each time, so that there is no question of objectivity.

Separate the surveys according to survey type. If you have only one type of survey, then that's easy! Tally the scores and create one master sheet that will be distributed and discussed at the meeting. Patient comments can be listed separately.

Surveys need to be taken seriously. That is, what one person writes earnestly probably represents the thoughts or feelings of many more. It's easy to laugh at, or blow off written comments that are uncomfortable to read, but that may be a form of denial. If you're sincere about fine-tuning patient service, then be open-minded to what others have to say.

Who wrote that crazy remark?

As comments are tallied, if there is a comment that might be hurtful to a particular person, it may be appropriate to show that comment to the doctor before including it in a master list seen by all. There's no one answer to this – each situation must be evaluated on a case-by-case basis.

It is human nature to try to figure out who wrote which comments. You may find yourself re-thinking which patients were in the office at the time of this survey group. Try to avoid doing this! It's counter-productive and really shouldn't matter! It could affect the way you interact with the patient in the future and you could well be wrong! Look at the group in the aggregate in order to understand how patients feel about you and your practice.

In your staff meeting, the team must evaluate what the overall feedback means. Bear in mind that the higher the quantity of surveys you have, the more accurate is the aggregate feedback.

The ideal in-office survey has 5 questions with room at the bottom for comments. When you evaluate responses, make a list of changes that you could effect in relation to each question. Then prioritize those ideas. Bear in mind that if there is a repeatedly "fair" or "poor" rating by patients in a certain area, it is vital that changes be made promptly.

Then provide feedback to patients in some form to ensure they know you truly pay attention to survey responses. You can include an article in your newsletter or put similar information on your website. The purpose should be to let patients know you listen. Though this can also provide promotional opportunities, the primary purpose should be to keep patients informed to your responsiveness and any changes made as a result of patient feedback.

Create your Survey

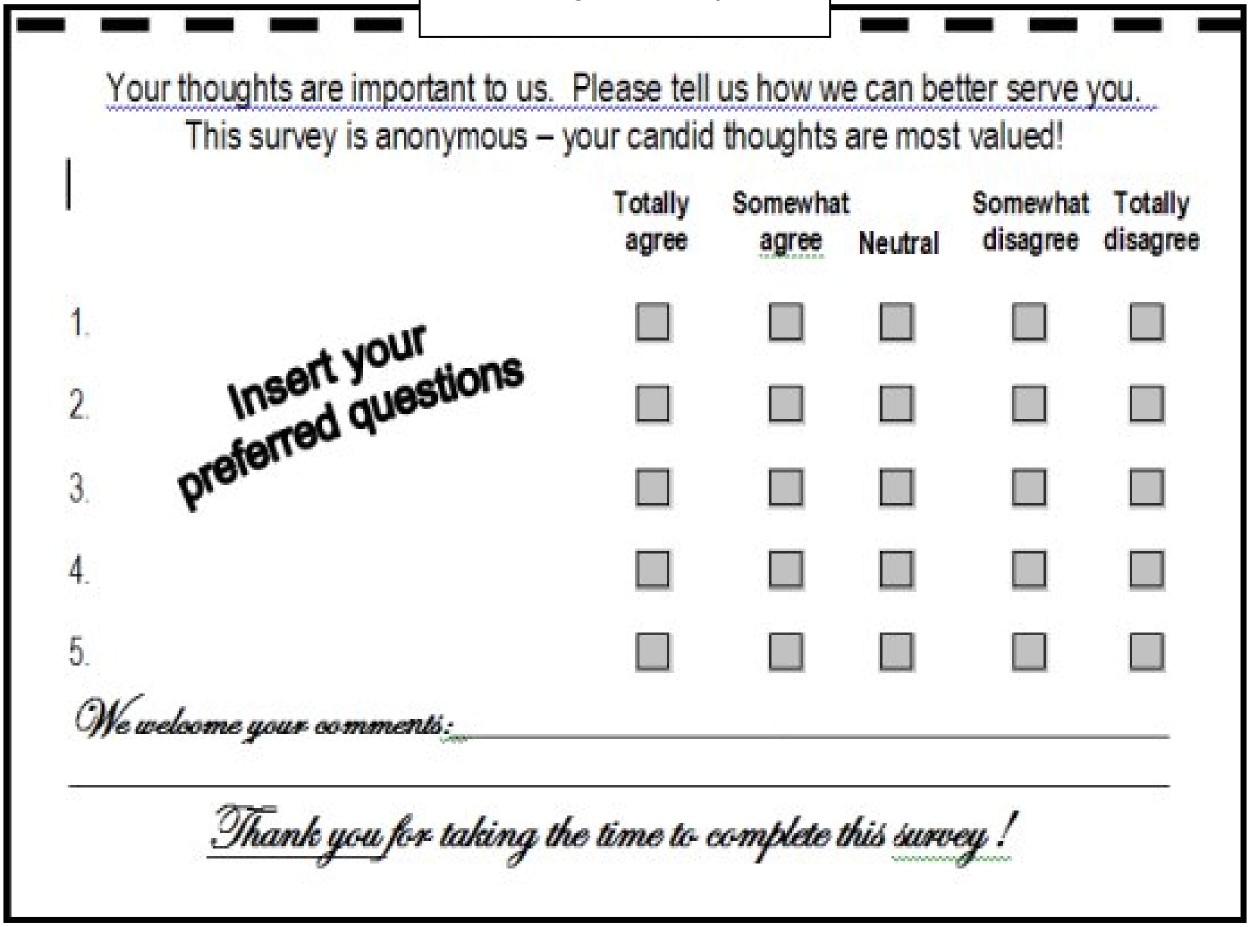
Paper color: White. If you create different surveys that are used during the same period, use a different paper color for each survey type.

Paper size: 4 ¼ x 5 ½" (½ sheet of 8.5x11)

Paper format: Fold the paper in half like a note card with the fold at the top. Survey questions will be typed horizontally on the inside of the "card". On the front face of the card (the part that will show as you hand it to the patient), type: "30-second quality quiz" in a large font. Be sure to test how long it really takes to complete the survey, and use the appropriate time-frame on the card front! If you use fewer questions, you'll get higher response rate

Survey layout: Plan on 5 questions related to the type of survey you are writing *(general, hygiene, new patient etc.)* The easiest surveys to complete are written so that answers are in the form of a "scale of agreement". It's very important that you consider the verbiage for each question and ensure that the scale you are using makes sense for the respondent. (See the sample layout on the next page.) It is very important that the scale is very clearly marked – so that the check off boxes are used correctly by the respondent.

Folded edge of survey card


Your thoughts are important to us. Please tell us how we can better serve you.
This survey is anonymous – your candid thoughts are most valued!

	Totally agree	Somewhat agree	Neutral	Somewhat disagree	Totally disagree
1.	☐	☐	☐	☐	☐
2.	☐	☐	☐	☐	☐
3.	☐	☐	☐	☐	☐
4.	☐	☐	☐	☐	☐
5.	☐	☐	☐	☐	☐

Insert your preferred questions

We welcome your comments:

Thank you for taking the time to complete this survey !

This represents the most "respondent-friendly" type of survey. The patient immediately sees it as easy to complete because of the check boxes. Once you have created one survey, it is simple to use it as a template for more surveys on different topics. The comments that patients write are often the most valuable feedback. Encourage patients to include their "candid comments" and let them know that they may use the back of the card if more room is needed.

Alternatively, you may ask a specific question you'd like patients to comment on, such as, ***"What could we have done today to make your experience in our office better for you?"***

Alternative Scale:

An alternative to the Agreement-disagreement scale is the "Satisfaction" scale. In this scale the check box column headings read as follows:

Very satisfied - Satisfied - Neutral - Not satisfied - Very unsatisfied

Clearly, the questions must be formatted so that this scale provides the appropriate response options.

Questions for your survey

The first decision to make is the type of survey you are planning – what kind of information do you seek from patients? Your survey may be a very general one to get an overview of patient perceptions of your office and service. That is the ideal starting place for the first survey you do in your office. As you proceed with surveys in your office, you may fine-tune the questions to get more specific feedback on certain issues. Also, you may consider running more than one survey during the same period, such as a general survey and a hygiene survey. If you take this approach it's a good idea to use different color paper to easily separate them.

There are no hard and fast rules for the questions you ask – you have many options. Listed are some questions you may consider for a general survey. Some questions are highly suitable for new patients, some are more focused and appropriate for patients of record. Whatever questions you choose, it is extremely important that you phrase the questions so that they make sense with the response scale you use.

- ❑ It was easy to locate the office
- ❑ There was ample parking
- ❑ I was pleasantly greeted in reception
- ❑ The appearance of the reception area is positive
- ❑ My appointment started on time
- ❑ I was treated well by the front office staff
- ❑ I was treated well by the clinical team
- ❑ I was treated well by the doctor
- ❑ This office is considerate of my needs
- ❑ The doctor listens to me
- ❑ The clinical team listens to me
- ❑ The business staff listen to me
- ❑ Financial matters are handled well
- ❑ Insurance matters are handled well
- ❑ It was easy to get a convenient appointment
- ❑ I like getting a courtesy call in advance of the appointment
- ❑ I was encouraged to ask questions
- ❑ The treatment was explained well to me
- ❑ I was educated about _____________
- ❑ I feel comfortable referring others to this office

The options on questions are endless, these are just a few! What is important is that you choose questions that relate specifically to your practice and your patients.

A good approach is to brainstorm as a team on this issue. Ask the team, to independently write down either:

- **What are the top 3 issues that patients seem to be unhappy about?**

Or ...

- **What are 3 questions you think we should put on our first survey?**

Then collect the pages and find common issues that are listed. That's indication of what different team members perceive from patients – having just front office staff, or just the clinical team writes the survey will only provide a skewed perspective. However, all team members get some type of feedback or impressions from patients and it's important to get a global perspective on this issue.

Testing the survey

This is a very important step! It is imperative to run at least a few test surveys prior to disseminating to patients. Ask "test respondents" to give real-world feedback. You need to find out what questions are confusing and how the survey might be improved. Once you've gotten the feedback, you'll be ready to run copies of these surveys. But don't run too many! It never fails that you'll find SOMETHING that needs to be tweaked, and you don't want to have 100 duplicated at that point!

Quantifying your survey results

If you apply values to the response options you can quantify and average patient responses. In other words, apply a numeric value to each response in the scale, such as:

Totally agree=5
Somewhat agree=4
Neutral=3
Somewhat disagree=2
Totally disagree=1

These numbers won't appear on the survey itself. However, they'll be used when you tally the surveys. Numbers help us understand where our strengths and weaknesses are. If you plan on conducting the same survey repeatedly (say once a quarter), then you are able to track your improvements and there is great value in this.

The rest of the story

Once you've conducted your first in-house survey, you'll find that it gets easier and easier to create future surveys. And you'll find many benefits to this process. These surveys will provide you with basic quantitative information. Once you've learned key information from patients you may opt to have a professional survey organization conduct more detailed surveys. Working with a professional survey firm can provide you with great depth of insights because the data is interpreted in far more complex ways.

You may also consider conducting a focus group with patients. This provides qualitative, subjective feedback. Focus groups may be based on issues gleaned from prior surveys, enabling you to ask for deeper information from patients. *See our article on **How to Conduct Your Own Focus Group.***

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