Instituting Higher Standards for Laboratory Customer-Touch Departments

By Peter T. Francis

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Clinical labs (commercial/hospital) have a host of different departments that regularly "touch" either clients or their patients. Examples are client services, billing, phlebotomy, sales, courier and technical/professional staff. For those labs who actively seek to increase their testing and revenues, it becomes obvious training these employees remains a critical factor if management expects them to meet or exceed customer/patient expectations.

Unfortunately, some managers view training as an interference with accomplishing their work. Thus, to consolidate time, effort and financial resources, upper management frequently employs the "tribal method" of training. This translates into the new employee sitting (or traveling in the case of sales and couriers) with an established staff member for a certain number of days and learning by word of mouth. Monkey-see, monkey-do. Hold on a minute—what if the staff person has a bad day, bad habits or a poor attitude? Is observation *all* that remains in developing a new employee? Top laboratories have customer-touch department supervisors (or a designated trainer) who provide classroom-style training, along with manuals and role-playing activities. They have the new employee review policies and procedures for their particular department as part of the on-the-job training.

The training should not stop after the initial session. Improving and advancing the skills and professionalism of every employee in the organization—especially customer-touch employees—remains an on-going process. Formal training sessions should be regular and non-negotiable. This accomplishes several things: (1) it demonstrates the lab's commitment to improve each employee, (2) it helps establish the lab's culture and (3) it embeds correct standards and procedures. With training, everyone sings in harmony to the same tune.

In the case of proper sales training, every representative should know things like (1) how to respond to common objections, (2) the four basic stages of a sales call, (3) the components of a good sales strategy, (4) how and when to suggest a commitment, (5) how to build effective relationships, (6) the follow-up procedures after a call (7) the various transport supplies the lab provides, (8) the connectivity solutions the lab offers, (9) when ABN forms are used, (10) the insurances (and related sub-products) the lab does *not* accept, etc. Knowing these items form the foundation. In addition, successful salespeople understand specific tests for up-selling opportunities. Sales people require on-going training and skills-refreshening due to the expansive knowledge they must possess for selling lab services. Sales training for established reps should be a minimum of twice a year to engrain the proper techniques and adjunctive lab knowledge. There exists no substitute for repetitive training and follow-up coaching.

Couriers, phlebotomists, billing and client service employees, especially, require continuing customer service training due to their incessant interaction with clients and patients. They create either an exceptional, average or poor experience for the customer/patient. In turn, this reflects upon the lab and shapes its reputation.

There are several things labs can do to build and manage extraordinary levels of customer satisfaction and loyalty. The supervisors (or trainer) need to teach that listening, understanding and responding to clients and patients are *very* important aspects of *every* employee's job. If a staff member uncovers an issue, they should solve it politely and expeditiously or pass it on for immediate upper management resolution.

Another operating principle good labs implement forges into two components: (1) defining superior service and (2) establishing a service strategy. Each customer-touch department should write down an understandable and unifying idea of what the department wants to accomplish to make itself unique in the client's eyes. This concept of service strategy directs the attention of people in the department toward the real priorities of the client. A service strategy translates into a distinctive formula for delivering service; it focuses on a well-chosen benefit premise that demonstrates value to the client and establishes an effective competitive position. In essence, it says, "This is who we are, what we do and what we believe in." The statement does not have to be long—in fact, brevity (one phrase or clause) can be powerful and meaningful.

Another way to establish superior benchmarks means setting standards and measuring performance. When it comes to improving service quality, the discussion begins and ends with the client's assessment. Superior service quality reigns if the client says so—and it vaporizes if the client says the department did a poor job. The client's most recent experiences and their level of satisfaction equate to the only true and reliable measurement of service quality. Targets need to be set for items such as report turnaround, warehouse supply turnaround, acceptable hold times in client services and billing, timeframes for courier pick-up, acceptable wait times at PSCs, acceptable number of specimen processing errors, patient re-draws, etc. One of the most common traits of outstanding lab companies shows in their dedication to measuring customer satisfaction—both clients *and* patients. Sending or handing out satisfaction surveys gives the lab a sense of its service levels and where they should make improvements.

To achieve higher standards, it condenses down to hiring the right employee for the right job. If you employ people within the customer-touch departments who maintain a strong interest in client relations and want to bend over backwards for the client or patient, you will inculcate an enviable culture and set your lab on the right course.

Establishing a "service recovery" component stands as another way to bring about superior customer service levels. Service recovery defines a term that describes a frequently repeated concern: if something goes wrong, will anybody make a special effort to set it right? Will someone go out of his way to make amends with the client/patient? Does anyone know when or how to deliver a simple apology? A good recovery system translates into a positive and managed effort to attack a problem so thoroughly the customer (or patient) recognizes the attention and understands the lab's willingness to make it right. Building an effective service recovery system begins with two things: (1) knowing the client/patient's expectations and (2) understanding what the service breakdown looks and feels like from the victim's viewpoint.

In summary, selecting the right individuals and offering continuous training within customer-touch functions will facilitate indoctrinating higher standards for your lab. In order to compete effectively, the sales organization needs a thorough and constant stream of training in a variety of components. Creating optimal operational benchmarks, listening to client feedback and then acting on the issues all work toward enhancing the lab's reputation. Every lab should institute a service recovery system wherein managers and supervisors (1) meet to review customer issues, (2) create resolution and (3) inform the client of the solution. All of the suggestions listed above will go a long way in establishing higher service standards for your laboratory.

*Peter Francis is president of **Clinical Laboratory Sales Training, LLC**, a unique training and development company dedicated to helping laboratories increase their revenues and reputation through prepared, professional and productive representatives. Mr. Francis stands as a proud member of the Washington G2 Advisory Board to which he has contributed a number of articles. He has also published articles in industry-related magazines such as **Vantage Point, ADVANCE for Administrators of the Laboratory, ADVANCE for Laboratory Professionals and Medical Laboratory Observer.** Visit the company's web site at www.clinlabsales.com for a complete listing of services.*