

Eli's Rehab Report

Practice Pointers: Retain Clients By Examining -- & Improving -- Their First Impressions

Find -- and fill -- your practice's gaps with this self-assessment tool.

Your practice's entire focus should center on regulatory compliance and industry benchmarks, right? Wrong -- and your inattention in other areas could significantly affect your business' success.

"Everyone talks about compliance, but what we need to talk about is how to our businesses can improve, what we could be doing better," points out **Peter Kovacek, PT, DPT, MSA**, rehab expert and principal with **Kovacek Management Services** in Detroit. And no one sees your flaws more acutely than your patients.

Solution: Before you can improve your practice's procedures and workflow, you must see it from your patients' perspectives using an assessment tool that outlines what's most important for your facility, Kovacek says. A self-assessment will reveal your missteps and give you a working list of what you can do to make patients' experiences better.

However, a generic tool won't reveal your clients' most pressing issues -- and it definitely won't help you fix the problems that keep them from coming back or recommending you to their friends and family.

Better: You should create a first impression assessment that is customized for your practice and your clients. Here's how to get started:

Start With The Right Template

There are many health care related self-assessment tools available to rehab providers, but not many address assessment from patients' perspectives and without a laser-like focus on compliance.

Look for: You want a self-assessment tool that doesn't ask you to compare yourself to other practices or facilities, Kovacek notes. "Every practice is a complex organism and no two are alike," he points out. Therefore, you want an assessment that pushes you to examine how you're doing against what your patients expect, not against what others are doing.

For instance, an assessment developed by Kovacek asks practices to evaluate their facilities' appearances and signage, how well staffers communicate with clients' family members, and whether staff members carry themselves professionally. These standards are all subjective to your region and client base.

Know What Matters Most

Once you find the self-assessment template that asks the right questions, you must determine which of those questions are really important for your practice and its clients.

Do this: Ask yourself, "What have patients been angry about? Where have they been disappointed? What questions do we have to answer over and over again?" suggests **Teresa Schneider, PT, MPT** with **FirstHealth & Rehab** in Gaithersburg. The answers to these kinds of questions will steer your assessment priorities.

You could even ask patients to complete a short survey before you begin the assessment. Ask them share their thoughts on where you're failing their expectations and what areas need the most improvements.

Home In On Wrongs, Not Rights

The goal of your assessment is not to prove that you're doing everything right -- it's to find the gaps between what you're doing now and what you'd like to do in the future, Kovacek says.

Use your client surveys, past experiences, and current priorities to really focus on the procedures and routines that aren't meeting expectations. If your staffers are constantly complimented on their telephone services, that area won't require intense focus. On the other hand, you'll want to take a close look at areas that receive many complaints.

Try this: Ask staff members to share with you any complaints or problems they've observed, Schneider recommends. Write each one down to see if a trend emerges. Keep this list on hand so that you can spot problems as they occur.

Prepare For An Assessment Cycle

Performing the first assessment moves you closer to creating an environment and culture that keeps clients coming back to your door, bringing their family and friends with them. But that's just the first step.

Now that you've spotted concerns and are working to address them, you must assess yourself again to make sure your solutions are working, Kovacek says. Each assessment you perform becomes a goal-tracker that allows you to measure how much you're improving, he notes.

For instance, the first assessment uncovers that your staffers aren't regularly asking about patient satisfaction. To rectify that, you might determine that your staffers should inquire about satisfaction at every other visit. You'd then use follow-up assessments to monitor your progress toward meeting that goal, Schneider points out.

Remember: Over time, the assessment you're using will need to change. Your client base may change or your practice's goals may shift, and the assessment must adapt to fit those needs. As you perform subsequent assessments, you must ask whether the metric you're using still fits. When it doesn't, start back at the beginning.

Put The Assessment To More Work

A self-assessment will reveal your practice's flaws, but you can gain even more traction out of it, Kovacek points out. "Creating and performing the assessment will open up a discussion among staffers and give them a defined set of behaviors and skills that they should strive for," he says.

Best: Assessments can easily put staffers on edge because they often appear to focus on rooting out an individual's flaws. However, if you make the assessment about streamlining workflow and giving patients a great first impression, you'll eliminate any judgment -- leaving staffers with the desire to overlook the "who done it" and get right at the "what will we do about it."

You can quickly get staffers' buy in by showing them how the assessment will benefit everyone, advises **Michael Roach** with **Michael C. Roach & Associates** in Chicago. For example, you might share with them how creating a calm, professional environment leads to a happier patient base. Then explain how increased patient satisfaction will lead to a larger client base and the potential for increased wages, he suggests.

The bottom line: Assessing your practice from you clients' points of view will highlight what you're doing well and what is begging for improvement. Using the assessment process, you'll create an environment that makes clients feel welcomed and appreciated -- and that's the best way to keep your services on the top of their minds.

Resources: Take a look at Kovacek's sample first impressions self-assessment tool on page 21. You'll also find other helpful managerial tools, such as a productivity workbook and quiz, basic business skills assessment, and ownership readiness assessment at <http://ptmanagerblog.com>.