

Seeking Help – Is Your Practice or Agency Consumer Friendly?

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What is the experience of consumers seeking help from your organization? Several months ago, my wife and I were shopping for a new bed and visited two national furniture chains. The contrasting customer experience was amazing. In one store, we were immediately greeted by warm and friendly staff that listened to our request, answered all of our questions and, while we were with him, and kept his focus totally on us—his customers. The experience in the other store was the exact opposite. We were not greeted by friendly staff, had to weave our way through the confusing store layout to find the beds, and could not easily find anyone willing to help us because each employee worked in their own department. Guess which store got our business?

Since 2002, addiction treatment and mental health providers across the country—including providers that offer treatment for problem gambling—have used a customer-focused process improvement method aimed specifically at improving access to and retention in treatment. This methodology is founded upon five key principals that differentiate successful versus unsuccessful organizations in implementing change.^{2,3}

1. Understand and involve the customer (user) of the process an organization is trying to improve.
2. Choose processes for improvement that meet an organization's overarching goals.
3. Engage powerful and respected change agents in the change process.
4. Seek ideas and encouragement from outside the field.
5. Quickly but thoroughly test solutions before full-scale implementation.

Of these five principles, we've found that the first principle is the most important. Before starting any change, agencies are asked to conduct a walk-through of their intake process or their process for engaging customers. The steps are simple:

1. Select two detail-oriented people committed to enhancing customer service to play the roles of a client and a family member.
2. Identify a typical presenting problem at your practice or agency.
3. Let your staff know about the walk-through and encourage them to make the experience as close to normal as possible.
4. Conduct the walk-through and experience the processes from the client and family perspective by asking what might a customer be thinking and how he or she might feel.
5. Record those observations and feelings.

Here is a quick guide to help you record those observations at each potential step of the intake process.⁴

- **Calling for an appointment:** Were you told to call back or transferred to voice-mail? Were you given an appointment during your first call? How long would you have to wait for an appointment? Were you able to schedule an appointment immediately? Would you have to miss work to get an appointment?
- **Appointment day:** As you arrive, think about what it would be like if you have never been here before. Is transportation an issue? Are parking, directions, and signage adequate? What was the environment like? Did it feel welcoming or cold and harsh? How were you greeted when entering the facility?
- **Intake process:** During the intake process think about it from the client's perspective or from the perspective for their family coming in for the first time. Fill out all the required forms. Were they repetitive, cumbersome and confusing or easy to complete? How long did you wait in the waiting room? Did the process engage the client's family? Were they able to accompany the client through the entire intake process? Will you have to wait a long time for the next appointment?

If the focus is treatment engagement, ask how easy is it to schedule the appointment? Do sessions meet the individual client needs? How welcoming are staff and other clients to new individuals? Does your organization follow-up with clients who miss their treatment appointment? At the end of the walk-through process, ask yourself two questions:

1. What most surprised you during the walkthrough?
2. What two things would you most want to change?

I would like to invite private practitioners and treatment agencies alike who provide treatment for problem gambling to conduct a walk-through in your organization, experience the intake process from the customer's perspective, or even ask them for feedback directly. Please share your findings by sending an e-mail to me at jay.ford@chess.wisc.edu. If we get enough responses, I will ask the NCPG to share the results with the field.

References

- ¹ Please visit www.niatx.net for more information about this initiative.
- ² Capoccia V. A., Cotter F., Gustafson D. H., Cassidy E., Ford J., Madden L. et al. (2007). Making "stone soup": How process improvement is changing the addiction treatment field. *Joint Commission Journal on Quality and Patient Safety*, 33: 95-103.
- ³ Gustafson D. H., Hundt A.S. (1995). Findings of innovation research applied to quality management principles for health care. *Health Care Management Review* 20:16-33.
- ⁴ See <https://www.niatx.net/Content/ContentPage.aspx?NID=32> for more detailed instructions