

## Mystery Shopper Study Results

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Submitted: August 16, 2018

West Michigan CMH recently participated in the Michigan Association of CMH Boards “Mystery Shopper” project.

As a part of participating in this project,

- WCMCMH Customer Services staff agreed to “mystery shop” other participating CMHs using the instructions, tool, and scenarios outlined by the Board Association.
- WCMCMH agreed to allow other participating CMH staff to “mystery shop” WCMCMH using the instructions, tool, and scenarios outlined by the Board Association.

Please see Attachment #1 of this document for more information about the instructions, tool and scenarios from the Board Association.

### Results:

For the period of April 2018 – June 2018, staff from different CMHs across the State of Michigan “mystery shopped” West Michigan CMH.

Below are the results of these 6 calls.

<u>Indicator:</u>	<u>Percentage of Yes Responses 2013:</u> <u>N=21</u>	<u>Percentage of Yes Responses 2014:</u> <u>N=20</u>	<u>Percentage of Yes Responses 2018:</u> <u>N=6</u>
Did staff person identify him/herself at initial greeting?	76.2%	100%	100%
The telephone was answered by a live voice.	100%	100%	67%
The initial greeting was warm and welcoming.	80.9%	100%	100%
The person spoke clearly and professionally.	85.7%	100%	100%
The person used terminology that I understood.	100%	100%	100%
The call was not hurried or rushed through.	85.7%	95%	100%
My questions were answered.	85.7%	100%	100%
I understood the information provided.	95.2%	100%	100%
This call was never put on hold for over 3 minutes in duration.	95.2%	90%	100%
I talked to no more than 2 people to get my question answered.	95.2%	90%	100%
This call met my expectations.	80.9%	95%	100%

### **Reviewer Comments:**

Louise informed me that it was in their annual paper. I then asked if the documents were attached that needed to be filled out, she wasn't sure so she informed me that she was going to transfer me to Cheri. Did not know who Cheri was until she stated her name and title when she answered the call. Cheri informed me that they have a mental health advance directive booklet and she could mail it or leave it at the front desk for me.

Jodi informed that my friend can walk into their agency from 8 am to 4:15; Monday through Friday or call on the phone. I asked her if my friend would need to bring with them if they walked in and she informed me that they would need to bring their insurance card and driver's license.

**Suggestion:** When someone calls requesting services, it would be nice if they informed the caller of what they need to bring with them if they decide to walk in to their agency for services. Someone anything calling that is needing services most likely wouldn't know that they need to bring their insurance card and driver's license with them. She was very polite and professional.

Called stating my brother is moving into city in Lake County and I am collecting info for him about the best way for him to request SUD services. Was told that as soon as he has established residency in Lake County, he can call the same number I called. He should say he is looking for new services.

Called stating my hearing impaired brother is moving into city in Mason County and I am collecting info for him about the best way for him to request services for the first time. She asked if I would be coming with him. I said, I could if helpful. While she offered to let me talk with someone about his "special needs" I did defer. And I asked if they felt him coming into the office would be preferable to calling and she thought so - especially if someone was with him.

Polite

I stated that I was interested in services and wanted to know how they determine cost of services. She asked what County I lived in because she did not recognize the area code that I called from. I state Barry. She stated that they only serve person in Mason and Oceana Counties. She asked if I could be put on hold and she would get me the number to call in Barry County. She picked back up the call in a couple minutes and gave me the number of 269-948-8041. She stated if I call that number they would be able to give me the information. She asked if there was anything else I needed before we ended the call.

Long wait initially to have call answered. I almost hung up. Call rang over 8 times and then there was a click and it started ringing again. The call was answered on the 2nd ring.

Family living in Baldwin has a friend that would like to come in for services but only speaks very little English. Staff asked for primary language of this individual. I stated Spanish. Staff suggested just come as a walk-in to the Lake County office here in Baldwin with the person that is requesting services. They have a bilingual staff member named Ashley that would be able to do a screening with them to see if they are eligible for services. Or if they had someone that they were comfortable with that was able to interpret, have them call and assist the individual requesting services with a phone screening done with Ashley.

Long wait initially to have call answered. I almost hung up. Call rang over 8 times and then there was a click and it started ringing again. The call was answered on the 2nd ring.

Translation and interpretation services should be provided at no cost to the client or potential client and this should be communicated. There are laws in regards to using family members or friends and should only be used in extreme emergency.

**Recommendations:**

The Mystery Shopper results will be shared with all clerical team members and other support staff that were identified as part of the project. In the past, the clerical team has found the results of this project to be very meaningful. All indicators were maintained or improved with the exception of "The telephone was answered by a live voice," which shows a significant decrease. It appears that this happened in two different instances where the phone rang over 8 times, clicked, rang again and was picked up on the second ring. According to the data the time frame of these calls was during the lunch hours when phone coverage is somewhat decreased which could have led to the caller experiencing multiple rings prior to an operator picking up. As a team we will discuss the scenarios and ways to avoid a caller experiencing multiple rings (to the point where they may think they should hang up.) Strategies will include placing an existing call on hold, while answering another incoming call.

## Mystery Shopping Scenarios

1. Access to Care - (caller to ask...How would I/family/friend get into services?)
2. Concerns regarding services (caller to mention they are not happy with their services. Who do they talk to?)
3. Mental Health Emergency - (caller to ask what they should do if someone is having an emergency)
4. Callers that speak other languages - (caller to ask for self/family/friend What to do if person does not speak English? How do they get help?)
5. TTD/TTY or Michigan Relay - (caller to ask for self/family/friend how someone who uses this type of equipment/service for calls reaches the organization)
6. Provider List (caller to ask how they can access or be sent a copy of the organization's provider listing)
7. Access to Substance Abuse Services - (caller to ask for self/family/friend how to contact the right place to get set up with SUD services)
8. Advance Directive/Crisis Plans (caller to ask for self/family/friend who to ask for information about AD. And if get CS rep...ask for a copy of information)
9. Cost of Services (caller to ask on behalf of self/family/friend how the cost of services is determined. What about private insurance? Medicaid? No insurance?)
10. Affiliate/CMH Information - (caller to ask for copies of information about the organization's board of directors, PIHP board, or other info that may want to ask for)

## Michigan Customer Services Mystery Shopper: 2018 Call Tracking Sheet

**Section I. Identifying information for each call. To be used to track the improvement opportunities of the call.**

I. Agency called:		Call Date:		Call Time:	
Agency phone number called:					

**Section II. For many agencies, it is part of the telephone answering protocols for staff to identify themselves. For others, it is not a requirement. As with section I, to be used by the agency that was called, to track the improvement opportunities of the call.**

II. Did the staff person identify him/herself at initial greeting? <i>If not, please ask for name below.</i>	Yes	No
	Name:	
Tracked for feedback purposes for the agency called. This item is not part of any score for the call.		

III. In the YES/NO column, please check the box to represent the answer to each question. If call is transferred or a voicemail is left, please indicate in notes section. <b>(Check only one score per each question – see below)</b>	Individual answering phone and/or CS representative	
CUSTOMER SERVICE CRITERIA	YES	NO
1. The telephone was answered by a live voice.		
2. The initial greeting was warm and welcoming. (the person was polite and friendly when answering the call)		
3. The person spoke clearly and professionally. (good voice rate/pitch, inflection, enunciation, respectful tone, empathic)		
4. The person used terminology that I understood. (no unfamiliar or unclear acronyms or jargon /slang language)		
5. During this call, I felt I was given enough time for conversation.		
6. My questions were answered.		
7. I understood the information provided.		

8. This call was never on hold for over 3 minutes in duration.		
9. I talked to <b>no</b> more than 2 people to get my question answered. (either the person who initially answered or the person I was transferred to helped me)		
10. This call met my expectations. (no unanswered questions, treated respectfully, good communication style)		
TOTAL YES		TOTAL NO
<b>IV. Scoring:</b> add the "1" and "0" scores from the "YES" and "NO" columns.		

Section V. If a call is answered and directed to voicemail before the Scenario question can be asked and the 10 call questions can be answered, use this section to track the message left and if/when the call is returned. Then, go back and provide a score.

For calls that were answered and sent to Voicemail.

Message left?		Call returned?		If returned, date, time	Notes about call
Yes	No	Yes	No		
		Within 24 hours			

Section VI. A summary of the answer(s) the caller received to the scenario situation.

**Call Scenario #'s**

1. Access to Care
2. Concerns regarding services
3. Mental Health Emergency
4. Callers that speak other languages
5. TTD/TTY or Michigan Relay
6. Provider List
7. Access to Substance Abuse Services
8. Advance Directive/Crisis Plans
9. Cost of Services
10. Affiliate/CMH Information

<b>VI.</b> Call Scenario #:		For feedback purposes, please summarize the answer/resolution given:

Section VII. Please give feedback about the call and improvements you would recommend regarding the way the call was handled.

<b>VII. How could this call have been improved? (Please provide specific details on how beneficial more information was needed and why)</b> Examples: Was the call answered by voicemail? Was there loud background noise? Was call disconnected? Was person's tone of voice distracted/curt/disinterested/might they have been eating? [THIS SECTION IS OPTIONAL]

Section VIII. Please report who made the call.

<b>VIII. CMH Calling</b> (Your name and your CMH)	
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