Content Sheet 13-1: Overview of Customer Service

Role in quality management system

This module will describe basic elements that are essential for developing an effective customer service program.

Customer satisfaction is a major component of a quality management system, and a significant focus in the ISO standards. Ultimately, the laboratory produces a product – the test result–for its customers. If the customer is not well served, the laboratory is not achieving its primary function.

Overview of the process

Philip Crosby defined quality practice as meeting the requirements of the customer. He applied this practice to business and manufacturing, but it is equally important for a medical laboratory. The medical laboratory needs to know who its clients are and to understand clients' needs and requirements.

Medical laboratories have a range of customers including patients, physicians, public health agencies, and the community.

Quality is meeting **customer needs**

Philip Crosby
Four Absolutes of Quality Management
1979

Laboratory responsibilities

It is the responsibility of the laboratory director to ensure that the customers' needs are met, and that there is customer satisfaction. The quality manager is responsible for measuring the degree of customer satisfaction, using surveys, indicators, and audits to take preventive and corrective action.

All laboratory staff must understand the importance of customer satisfaction. Laboratory personnel must always interact with customers in a way that is appropriate, providing needed information, and being courteous.

Establishing a program to address customer satisfaction

Seeking customer satisfaction requires the following.

1. Commitment—Customer satisfaction is a requirement of several international standards for laboratory quality, but some laboratory staff might consider it secondary to technical competency. Because of the importance of customer satisfaction in a quality system, all staff must be strongly committed to the process.
2. Planning—Monitoring takes time and planning to be done properly. Appropriate monitoring tools need to be developed prior to gathering information. Poor planning results in inadequate information and often leads to uninterpretable information.
3. Knowledge—Creation of useful monitoring tools requires specific knowledge. If there are not people in the laboratory that have that knowledge, the laboratory may consider sending staff for special training or hiring a consultant.
4. Resources—The process to monitoring does not have to be heavily resourced, but does take time. Some of that time can be saved by having access to calculators, computers, and the internet.

Content Sheet 13-2: The Laboratory Clients — The Customers

The laboratory and its clients

The laboratory has many clients and the needs of all must be carefully addressed. A central figure in the client list is the **physician or health care provider**. The initial request for service originates with this person, and the laboratory staff generally identify the ordering physician as the primary client. Remember that in a hospital setting, the health care provider will be assisted by many other people, including **nurses, medical assistants, phlebotomists, and secretaries or clerks**. These vital hospital personnel should also be considered clients of the laboratory, and their needs must be considered.

Another important client for the laboratory is the **patient**, usually including his/her **family**. Family members may play a very important role in patient management, and may help with sample collection and transport.

When laboratory testing is being performed to meet a public health need, **public health officials** or workers become clients of the laboratory. The laboratory is a critical partner in surveillance, disease detection and prevention, and other public health programs. Laboratories need to meet the needs of the public health workers in addressing problems. They sometimes need to share information without compromising the confidentiality of the patient. Specialized laboratories such as food safety or water testing laboratories would have other customers to consider such as **food producers, manufacturers, or water systems managers**.

The **community** in which a laboratory works also has expectations. The community needs to be assured that the laboratory will not create a risk for workers, visitors, or the public.

In many countries, laboratory tests can only be ordered by a licensed health care provider ─ a physician, or a nurse, or a dentist. In some countries, laboratory tests can be ordered by the patient directly without referral from a physician or nurse. Some patients do not have the knowledge or expertise to order the right test or to interpret results. Laboratory personnel may have to provide assistance in test selection and interpretation.

Legal identity

International standards usually require that any laboratory clearly identify itself to the public, giving assurance that an identified person is in charge and accessible. At a minimum, every laboratory must make public a laboratory name and address, and the name of the director, including relevant contact information.

Physician/ health care provider requirements

The health care provider expects to have access to accurate clinically relevant information that can be understood and used in a timely manner. Health care professionals need assurance of laboratory responsibility throughout the testing process, including preexamination steps, the testing process itself, and the post-examination process.

In the re-examination phase, physicians will be particularly interested in the test menu. They benefit from an accurate collection manual, requisition forms that are complete but user-friendly, and a timely delivery system.

For the testing or examination phase, physicians would like to be sure of working with competent personnel. They need to know that the test methods being used have been validated and that testing is done with good process control and with quality control procedures in place. Appropriate management of all adverse occurrences or errors will significantly affect physician laboratory use.

The physician looks to the laboratory to do an excellent job in managing the post-examination steps, as these are critical to receiving the results of testing. A solid laboratory information system, a method for results verification, and for delivering timely and interpretable results to the right place are all important.

Patient requirements

The patient expects to receive personal care, keeping in mind comfort and privacy. He or she also expects to be assured that the testing has been done correctly and properly, and provided to the health care provider in a timely manner.

The laboratory actions needed to meet the patient requirements include:

- providing adequate information, both for collection of a specimen, and also information about the laboratory;
- providing good collection facilities;
- having available trained and knowledgeable personnel; personnel should know how to collect a sample properly, and should be trained to be courteous to all patients.
- giving assurance that the laboratory records are maintained properly so that they can be easily retrieved, and also giving assurance of protection of the confidentially of the records.

Public health requirements

Public health professionals have the same needs as health care providers, requiring that all parts of the pre-examination, examination, and post-examination processes are carried out properly. They may need special kinds of information in dealing with an outbreak or epidemic, such as specific collection processes or forms designed for the particular project or investigation. Public health officials will also be particularly concerned with safety issues and containment of infectious material.

Food manufacturers and producers and, water plant managers will need information from the laboratory to help them comply with their specific quality requirements.

Community requirements

The community in which a laboratory does its work expects that dangerous materials will be kept within the confines of the facility, and that the laboratory will protect their own workers from risk. The community should be aware of communicable disease alerts, and surveillance and response activities.

The laboratory is responsible for assuring safety and security, for containment of any infectious materials, for dealing appropriately with waste management, and for following all regulations for the transport of dangerous goods.

Serving all clients well

All clients benefit when a laboratory chooses to put in place a quality system and to seek recognition that it is accredited to the highest standards. This provides assurance that the laboratory is following quality practices and that the results it produces are accurate and reliable.

Good customer service provides:

- valuable information for best patient care;
- valuable information to improve surveillance and other public health actions;
- a professional image for the laboratory.

Customer service is an integral part of a quality management system.

Content Sheet 13-3: Assessing and Monitoring Customer Satisfaction

Methods for assessment

In order to understand whether client needs are being met, the laboratory will need to employ tools for gaining information. The laboratory needs to actively seek information from customers, rather than just waiting for customers to contact the laboratory with a complaint.

Important information on customer satisfaction may be obtained using:

- complaint monitoring
- quality indicators
- internal audit
- management review
- satisfaction surveys
- interviews and focus groups.

The monitoring of customer service/satisfaction is part of the continual improvement performed by the laboratory.

Using assessment methods

When the laboratory is contacted about a problem, this can provide important and helpful information. All such complaints should be thoroughly investigated, and remedial and corrective action taken. However, remember that **received complaints** may reflect only the "tip of the iceberg" because many people do not complain. The laboratory cannot use received complaints as the only means of assessing customer satisfaction.

Quality indicators are an objective measure of laboratory practices. Indicators can be developed that look at complaints, timeliness, patient refusals, lost or delayed laboratory reports, as examples. When these indicators are being monitored, information about customer needs and satisfaction will be acquired.

When the laboratory conducts **internal audits**, some aspects of laboratory practice that affect patient satisfaction can be examined. Examples might include turnaround times, always of great concern to physicians or health care providers.

All findings from these investigations should be very carefully **reviewed by management** and followed up with appropriate action.

Content Sheet 13-4: Customer Satisfaction Surveys

Customer surveys

In order to actively seek information about how clients view the laboratory's service, it will be necessary to conduct surveys (paper-based or electronic) or to use interviews and focus groups. In this way the laboratory can address specific questions to areas of concern, and can look at areas not commonly covered by complaints or internal processes.

ISO standards put a heavy emphasis on the importance of customer satisfaction; customer surveys are required in ISO 9001 standards for quality management systems. Any laboratory that implements a quality management system, whether accredited or not, needs to use some method for surveying clients in order to understand whether needs are being met.

To be successful, **surveys** should be carefully planned and organized. Deciding which clients to ask to participate in a survey is important. Surveying health care practitioners is often easier than surveying patients. Laboratory staff can also be asked to participate in surveys and may offer good suggestions for streamlining operations to improve customer service.

Any survey questionnaire should be pre-tested for clarity. When developing material, avoid leading and biased questions. Be sure to analyze the results in a timely manner, and, when possible, provide some feedback to the group that has been surveyed.

If the survey is to be conducted using **interviews,** the following tips can be helpful.

- Write out all questions in advance, so that everyone is asked the same questions.
- After asking some specific questions about their satisfaction with the laboratory, ask an open-ended question that allows customers to provide honest feedback. For example, ask how the laboratory could improve its service to you.

Employing **focus groups** can be a very useful technique for gathering information on customer satisfaction. The process of a group discussion will often elicit comments and ideas from all the participants that might not otherwise surface. When conducting focus group discussions, consider the following:

- assemble small groups of 8-10 people;
- include people with diverse backgrounds and laboratory needs;
- start by asking questions that build trust;
- develop a focus group guide for consistency between groups;
- ask open-ended questions—not "yes or no" questions.

Summarize verbal responses in a written report that can be used by the laboratory as a tool to improve customer service.

Successful surveys identify OFI

When measuring customer satisfaction, whether by survey, indicators, or audits, much will be learned when the method is successful. This information and the insights on customer service that it provides can be used to help the laboratory identify opportunities for improvement (OFI). The OFI will lead to preventive and corrective actions.

Information gathering must lead to change in a continual improvement process.

Content Sheet 13-5: Summary

Summary

Seeking customer satisfaction requires commitment from the laboratory management and staff. It is important to remember that technical competency is not the only goal for the laboratory.

A program for addressing customer satisfaction requires good planning, the development of appropriate monitoring tools, the knowledge to apply the tools to gain usable information.

Customers, or clients, of the laboratory include physicians and other health care providers, hospital and clinic staff, patients and their families, public health officials, and the general community.

Monitoring customer satisfaction requires some resources, primarily involving staff time. Managers need to assure that these resources are available.

Key messages

- Meeting customer needs is a primary goal of the laboratory.
- Everyone in the laboratory is responsible for quality, and, therefore, for customer service.
- An active quality management system ensures laboratories meet all client requirements.