

How to Make Your Lab More Efficient & Service-Focused than Ever

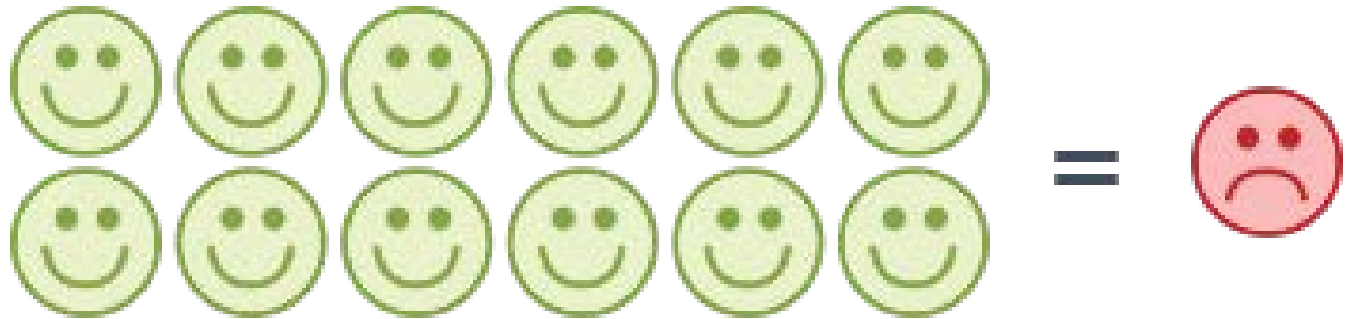
Presented by:

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(ASCP)**

Vice President of Client Services
Stone Clinical Laboratories

Did You Know?

It takes **12** positive experiences to make up for one unresolved negative experience.



Source: "Understanding Customers" by Ruby Newell-Legner

2 Focus Areas Client Services Must Resolve:

- Client Onboarding
 - Streamlined process
 - Positive experience
 - Accurate training
- Managing Data
 - Accountability
 - Action driven
 - Accuracy
 - Efficiencies



Bad Customer Service will Cost You

78% of consumers have bailed on a transaction or not made an intended purchase because of poor service experience.



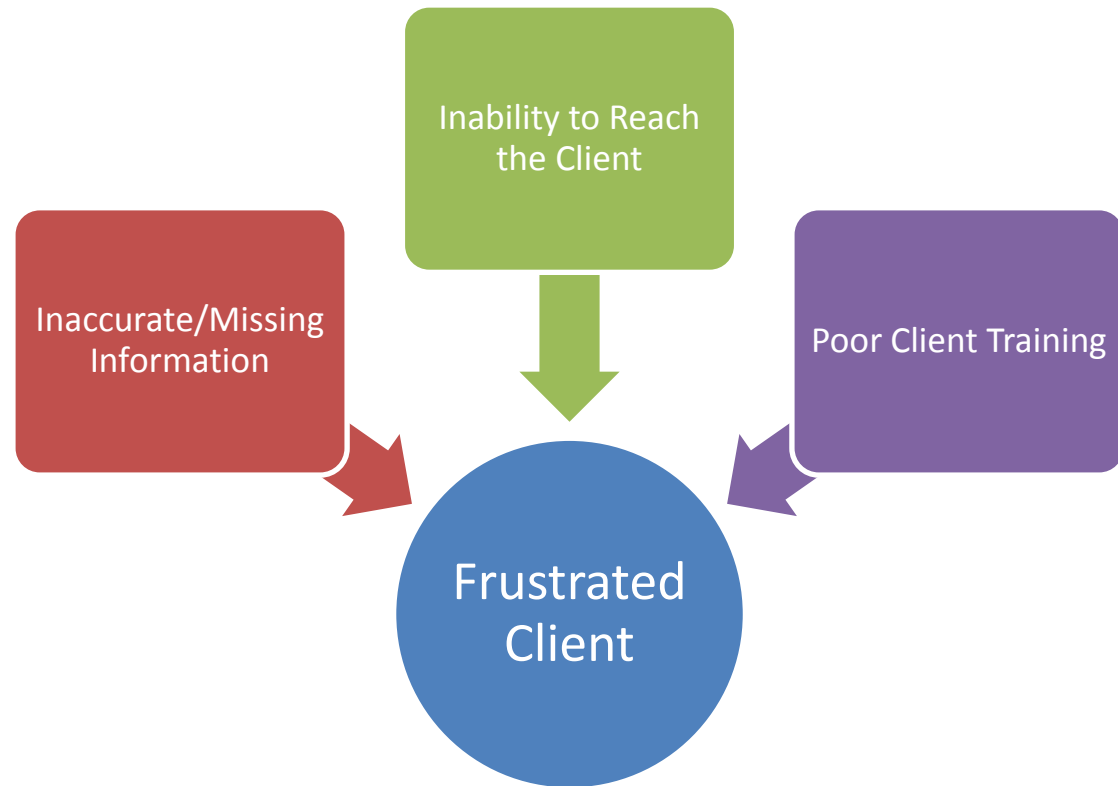
Source: American Express Survey, 2011

The background of the slide is a composite image with a blue and purple color scheme. It features various laboratory glassware including beakers, flasks, and test tubes, some containing liquids. Overlaid on this are several chemical structures and molecular models, including a benzene ring, a carboxylic acid group, and a complex organic molecule. The text is centered over a white rectangular area.


CLIENT ON-BOARDING

Without proper information in laboratory systems
the client's experience can be frustrating.

3 Common On-Boarding Problems:



Inaccurate or Missing Information:

- 
- Client name & address
 - Provider NPI
 - PECOS eligibility
 - Contact name for critical results
 - Fax number
 - Result method
 - Hours of operations
 - Billing & shipping preferences

Inability to Reach the Client:



- Critical results cannot be quickly and correctly relayed
- Delayed supply shipments
- Unable to deliver results
- Cannot retrieve missing information
- Billing issues remain unresolved

Poor Client Training:



- Rejected specimens
- Not accurately completing the requisition form
- Pre-analytical errors
- Samples misidentified
- Proper processes overlooked

General Frustrations:

- All client & laboratory interactions are critical
- Misinformation leads to multiple calls to or from the client
- Missing or incorrect supplies can delay specimen collection
- Patient care is jeopardized due to delayed results
- Incorrect client billing information leads to delayed collections



Becoming a Service Focused Laboratory



- Smaller staff in today's climate must be efficient
- Data must be readily available to all staff in real-time
- Errors can be identified and prevented with data collection tools
- Less time addressing problems leaves time for client outreach

Lessons Learned: The On-Boarding Dos



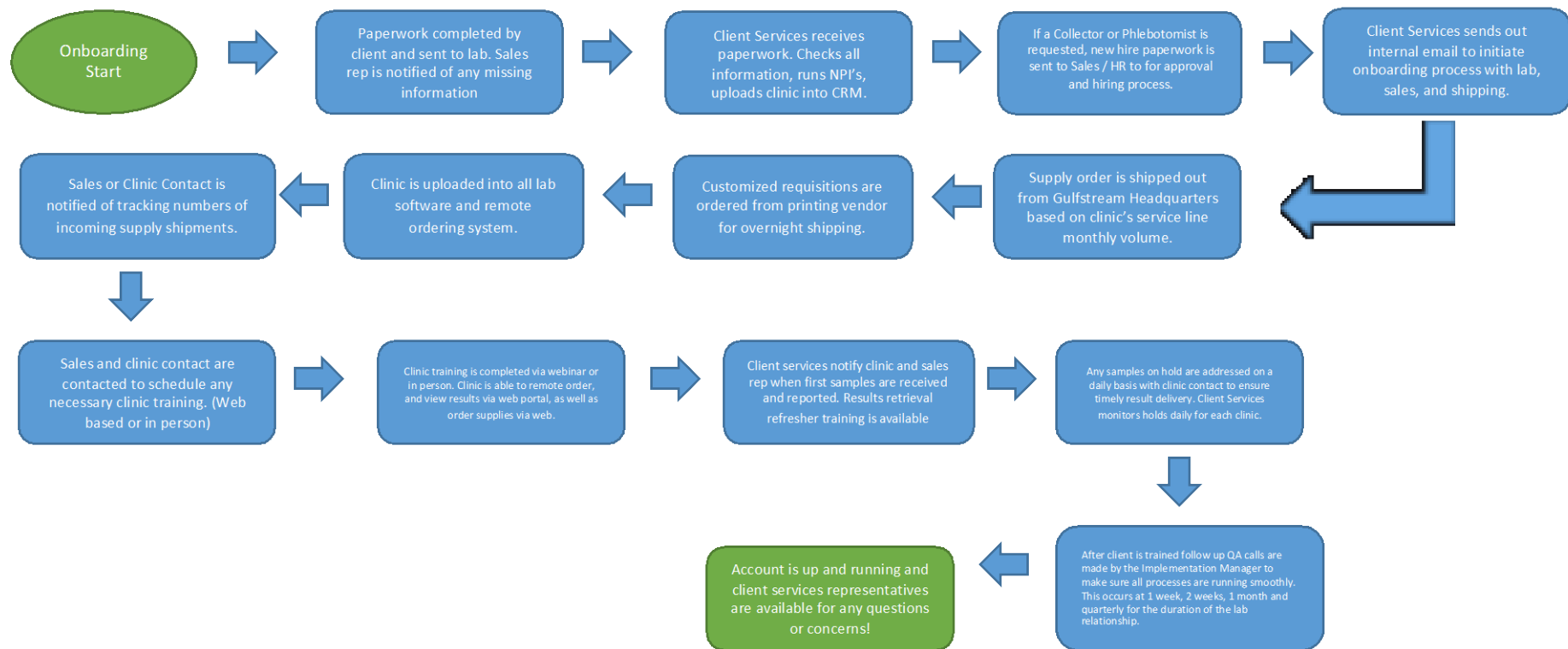
- Review the needed info with sales teams and client account reps
- Confirm information with the client upon receipt
- Compile data in a centralized secured platform accessible by all team members

Lessons Learned: The On-Boarding Don'ts



- Accept samples from clients without all necessary information being received
- Rely solely on paperwork
- Assume that you can train the client after they send the first samples

Proper On-Boarding Process:



CRM Improves Processes & Tracks Efficiencies

Before CRM

- Clients had > 50% pre-analytical error rate on specimens.
- Onboarding supplies would remain unshipped or client not trained properly.

After hc1

- Pre-analytics errors **reduced to <20%** and the rate is still dropping.
- All clients are successfully on-boarded without missing any steps in the process.



Case ID: C23

Organization Physicians Group A

Host Codes ORG21003

General Information

Supply Request

Save

Save & Back

Supply Request Form

Description

Supply Category

-- Select a Category --



Supply Item

-- Select an Item --



Desired Quantity

0



Add Request

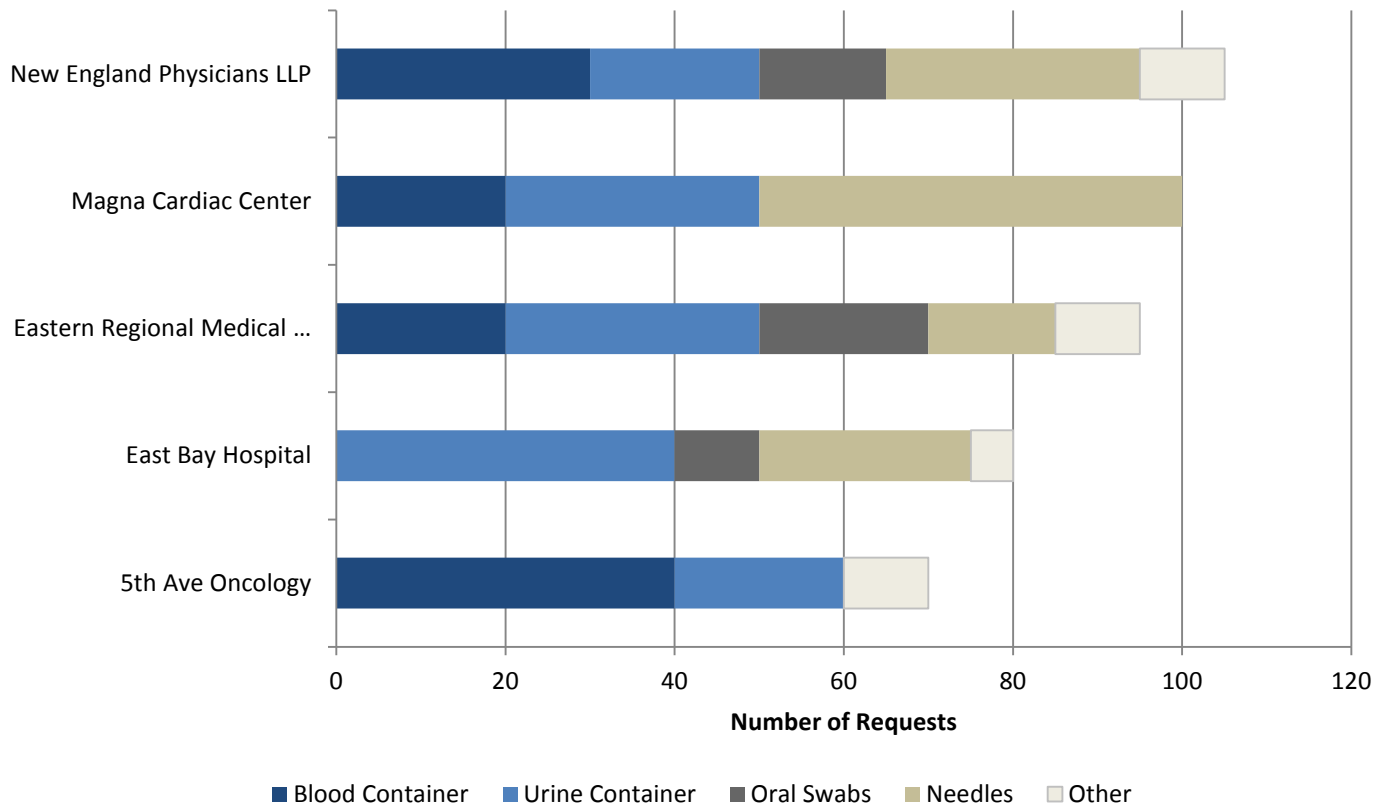
Line #	Supply Item	Category	Qty Requested	Shipping Status		
1	Lancet Needle	Blood Collection	30	Ordering	<input checked="" type="checkbox"/>	
2	Vacutainer Blood Collection Tube, 5mL, Lavender	Blood Collection	20	Ordering	<input checked="" type="checkbox"/>	
3	Specimen Cup w/ Temperature Strip	Urine Collection	15	Ordering	<input checked="" type="checkbox"/>	
			Update Selected	-- Select Status --	Submit	

Dashboard

Supply Request

[+ Add Tab](#) [✕ Remove](#)

Top 5 Accounts – Supplies Requested:



Filters

General Filters

Date:

Last 3 Months

Supply Category:

Blood Container
Urine Container
Hair Containers
Oral Swabs
Needles

Select: [All](#) | [None](#)

Accounts:

5th Ave Oncology
East Bay Hospital
Eastern Regional Medical ...
Magna Cardiac Center
New England Physicians LLP

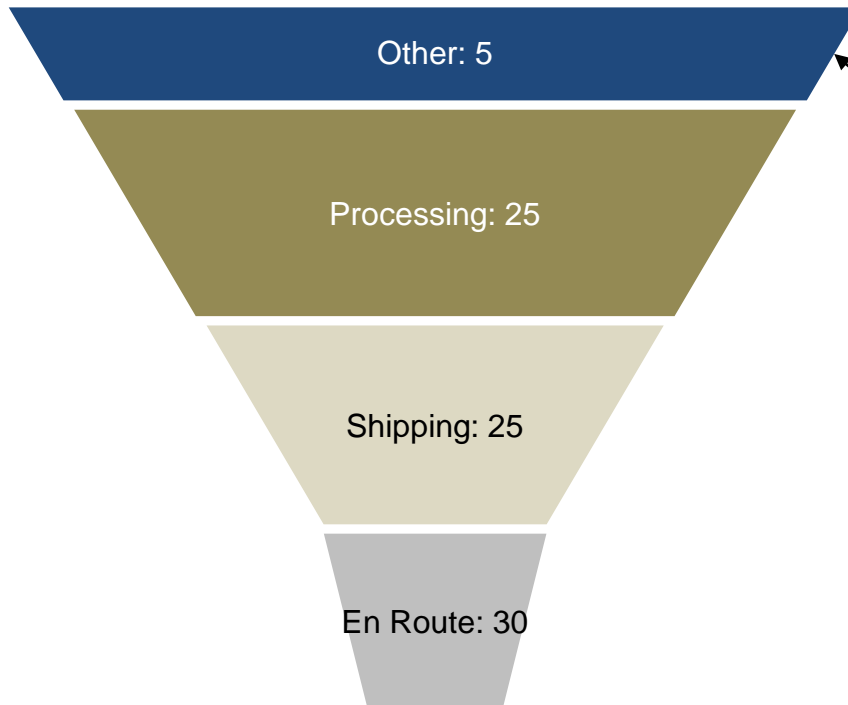
Select: [All](#) | [None](#)



Dashboard

Supply Request

Supply Request Pipeline:



Investigate supply
pipeline and
issues

[+ Add Tab](#) [✕ Remove](#)

Filters

General Filters

Date:

Last 3 Months

Supply Category:

Blood Container
Urine Container
Hair Containers
Oral Swabs
Needles

Select: [All](#) | [None](#)

Accounts:

5th Ave Oncology
East Bay Hospital
Eastern Regional Medical ...
Magna Cardiac Center
New England Physicians LLP

Select: [All](#) | [None](#)

Did You Know?

A typical business hears from 4% of it's dissatisfied customers.



Source: "Understanding Customers" by Ruby Newell-Legner



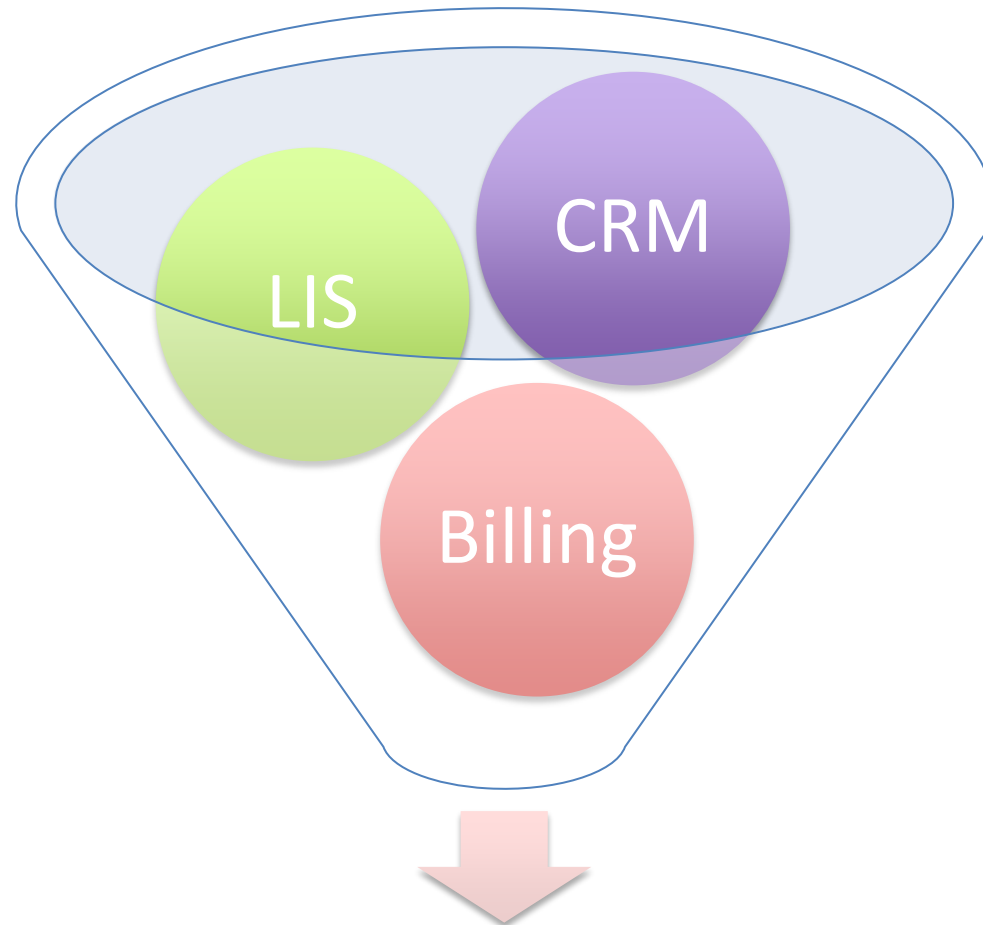
MANAGING DATA

Keeping all information organized, accessible and up-to-date

Pain Points with Manually Managing Data

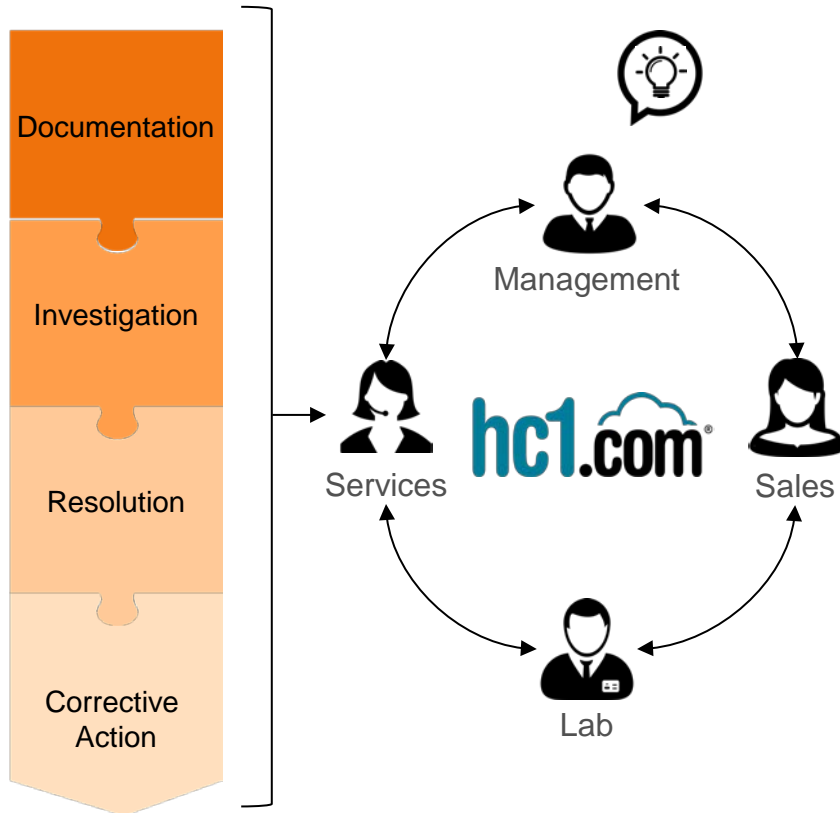


3 Essential Tools for Modern, Successful Service



Integrated onto 1 Secured Platform

CRM Streamlines Processes & Centralized Documentation



- Driving efficiencies & accountability to provide client-centric service
- Gaining immediate visibility into trends & analytics
- Decreasing time in resolving client issues
- Simplifying & standardizing workflows

10 Signs You Need a CRM



10. More time spent with the process than serving clients
9. No single source of information
8. Little to no visibility into processes
7. Reports are difficult to pull
6. Losing data
5. Treating every client the same
4. No idea how the lab is performing from the clients' view
3. No visibility into client activities
2. Not sure how you are acquiring/losing clients
1. Losing more clients than gaining

How a CRM Delivers a Positive Client Experience



- Pinpoint trends in real-time
- Align all stakeholders
- Quicker responses to clients
- Discover opportunities for internal and external improvements
- View all client activities
- Central location for all information
- Standardize, consistent processes & communication

Identifying Your Process:











Tracking is required for all clients:

- ☐ Who are the account contacts?
- ☐ When were supplies shipped?
- ☐ What are the tracking numbers?
- ☐ What time do they need specimens picked up?
- ☐ Is the courier /shipper pick up scheduled?
- ☐ Has the client been trained to review results in the portal?
- ☐ Has the fax line been confirmed to be working?

CRM is More than Issue Management



 Documentation	 On-Boarding	 Client Confirmation	 Data Entry
 Supply Tracking	 Specimen Pick-Up	 Portal Training	 Accountability



5th Ave Oncology

Mailing Address: 412 Grand Forrest Dr., New Bedford, MA, 2744

Phone: (941) 356-3106 | **Fax:** (863) 563-9670

Host Codes: ORG20102

Document and access all account details in one profile and easily configure for your business needs

[Find Duplicates](#)
[Edit](#)

General Information

Location & Contact Information

Contacts & Providers

Onboarding

Organization Number

472227

Organization Type

Strategic

Relationship Manager

Ront, Frank front@hc1.com

Sales Rep

Ront, Frank front@hc1.com

Sales Territory

South

Specialties

Oncology

Important Contacts



Karri Kirkland

karrimkirkland@5th...

(941) 356-3106



Dr. Alberto Groesbeck

albertoagrosbeck@5...

(863) 942-6472



Dr. Robert Thornton

robertgthornton@5th...

(406) 325-2482



Review current activities, documents and emails

Initiate documentation of a customer call after a quick glance at the current activity

Activities

Orders

Attachments

Messages

Create a new:



Case



Task



Memo



Opportunity

All



Quick Filter

		Organization	Type	Category	Subject	Order Date	Due Date	Status	Priority	
		5th Ave Oncology	Task	Sales Visit	Onsite executive presentation	06/01/2015	06/02/2015	Open	Medium	
		5th Ave Oncology	Case	Results	Dr. Thornton needs results to be resent	05/28/2015	05/30/2015	Open	High	
		5th Ave Oncology	Case	Complaint	TAT delay complaint	05/26/2015	05/27/2015	Open	High	
		5th Ave Oncology	Case	Complaint	Billing complaint	05/21/2015	05/22/2015	Closed	High	

<< < 1 - 4 > >> out of 4 | Page Go | Rows per page: 10

See outstanding tasks and issues at a glance


5th Ave Oncology > C457


Case ID: C457

Organization 5th Ave Oncology

Host Codes: ORG20102

Streamline and standardize data entry by configuring hc1 to align with each of your workflows

General Information

Details

Subject	Results not reported when expected
Category	Services
Subcategory	Complaint
Root Cause	
Assigned To	Customer Service
Status	Open
Priority	High
Date *	05/27/2015 9:15 AM
Description	Karri called to get the status on another result for Dr. Thornton
CC Users	



This Case is unresolved

Resolve Case

Cancel Case

Integrate your LIS to associate orders and specimens to hc1 Cases

Related Items



Karri Kirkland

karrimkirkland@5th...

(941) 356-3106



Dr. Robert Thornton

robertgthornton@5th...

(406) 325-2482

...

Order # 1741121



Keep related contacts visible and accessible within the hc1 Case

Activities

Attachments

Messages

Create a new: Memo Task

All



		Assigned To	Type	Subject	Created On	Due Date	Status	Priority
--	--	-------------	------	---------	------------	----------	--------	----------

Dashboard

Case Management

Monitor your team's open cases based on how long they've been open to ensure timely resolution.
Set your own thresholds to highlight urgent items.

+ Add Tab × Remove

Summary

Detail

Open Cases by Days Open



Create Date	Days Open	Client	Category	Subcategory	Case Owner	Link
05/28/2016	4	5 th Avenue Oncology	Services	Complaint	Jasmine Flowers	View
05/28/2016	4	East Bay Hospital	Services	Inquiry	Jasmine Flowers	View
05/30/2016	2	5 th Avenue Oncology	Services	Results	Carl Baxter	View
05/30/2016	2	Egon Physicians	Services	Results	Trish Martin	View
05/30/2016	2	Hoosier Heart Clinic	Services	Supplies	Jasmine Flowers	View
05/30/2016	2	5 th Avenue Oncology	Services	Complaint	Steve Gillespie	View
05/30/2016	2	5 th Avenue Oncology	Services	Results	Trish Martin	View

Case Owner Volume and Time to Resolution



Owner	Open	Resolved	% of Total	Avg. Hours
Jasmine Flowers	21	121	45%	21.5
Trish Martin	5	51	19%	6.8
Steve Gillespie	2	65	23%	5.4
Carol Spear	1	35	13%	9.1

Root Cause	Resolved	% of Total	Avg. Hours
Collection Error	156	40%	21.3
Physician Error	123	26%	6.5
Courier Error	72	21%	12.7
IT error	45	13%	18.7

Filters

General Filters

Date

05 / 01 / 2016

05 / 31 / 2016

Organization Type

Hospital
Physician Office
Urgent Care

Select: All | None

Customer

- Omit -

Case Owner

Carl Baxter
Trish Martin
Steve Gillespie

Select: All | None

Set your own thresholds to highlight in red the items requiring action, such as Average Time to Resolution exceeding 15 hours.

Dashboard

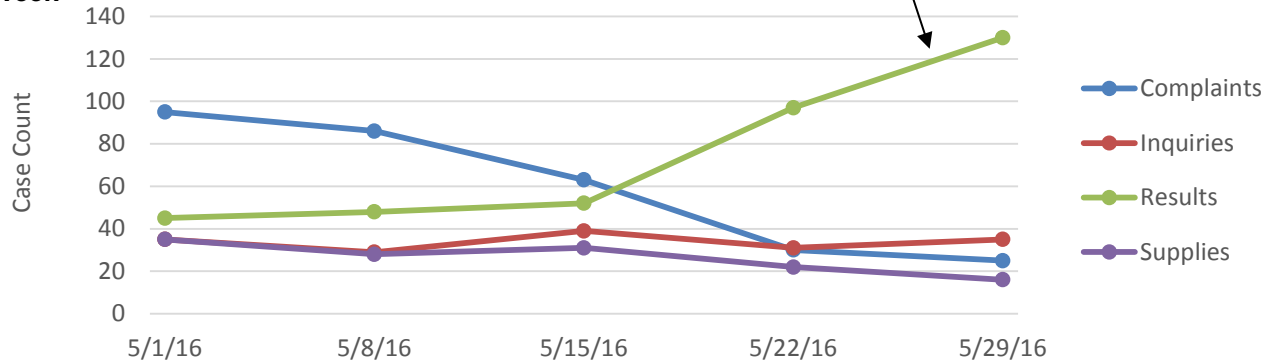
Case Management

Summary

Detail

Case Trends by Sub-Category

Year | Quarter | Month |
Week



Manage your business based on growing trends. When result related calls are on the rise, this may indicate a larger issue with your lab's resulting

[+ Add Tab](#) [✕ Remove](#)

Filters

General Filters

Date

05 / 01 / 2016

05 / 31 / 2016

Organization Type

Hospital
Physician Office
Urgent Care

Select: [All](#) | [None](#)

Customer

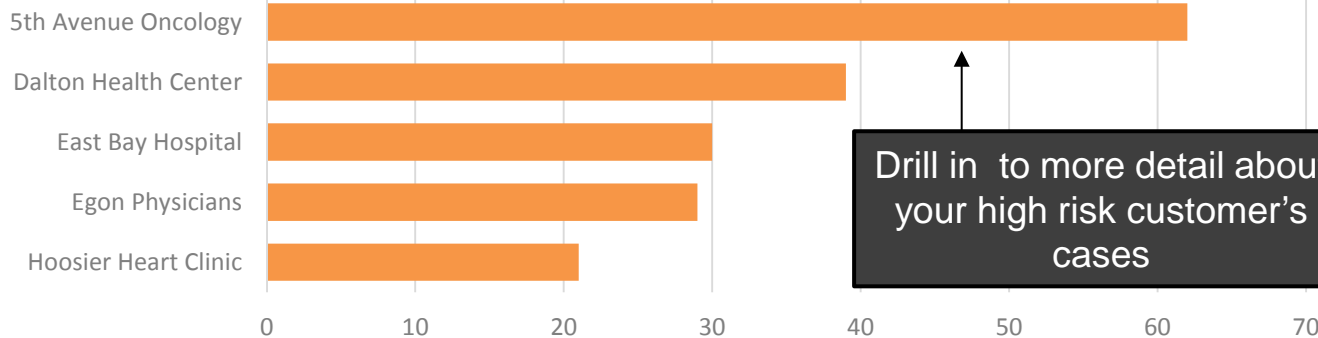
- Omit -

Sub-Category

Complaints
Inquiries
Results

Select: [All](#) | [None](#)

Case Volume by Customer



Drill in to more detail about
your high risk customer's
cases

4 Parameters for a Client Service Department



1. The Client Services department is the liaison between everyone outside the laboratory and the laboratory operations
1. Answering questions and resolving issues is considered the purpose of Client Services, not an interruption
1. Tools must be developed and information made readily accessible to Client Services representatives
1. All measurable activities must be monitored for effectiveness and improvement opportunities

Source: "Customer Service and Its Importance in the Clinical Laboratory" Victoria L. Anderson

Achieving Superior Services



Client Outreach Experience



Organized,
Enhanced
Communication



Faster Issue
Resolution



Greater Visibility
into Client Issues



Proactive
Identification of
Trends



Transparency with
Ordering Patterns



Quicker Access



More Meaningful
Data



Greater Client
Satisfaction



Staff Satisfaction

Real-World Success Story

Before CRM

- Difficult client onboarding process due to lacking accountability
- Absence of an outreach program and wasted opportunities to grow revenue and client base

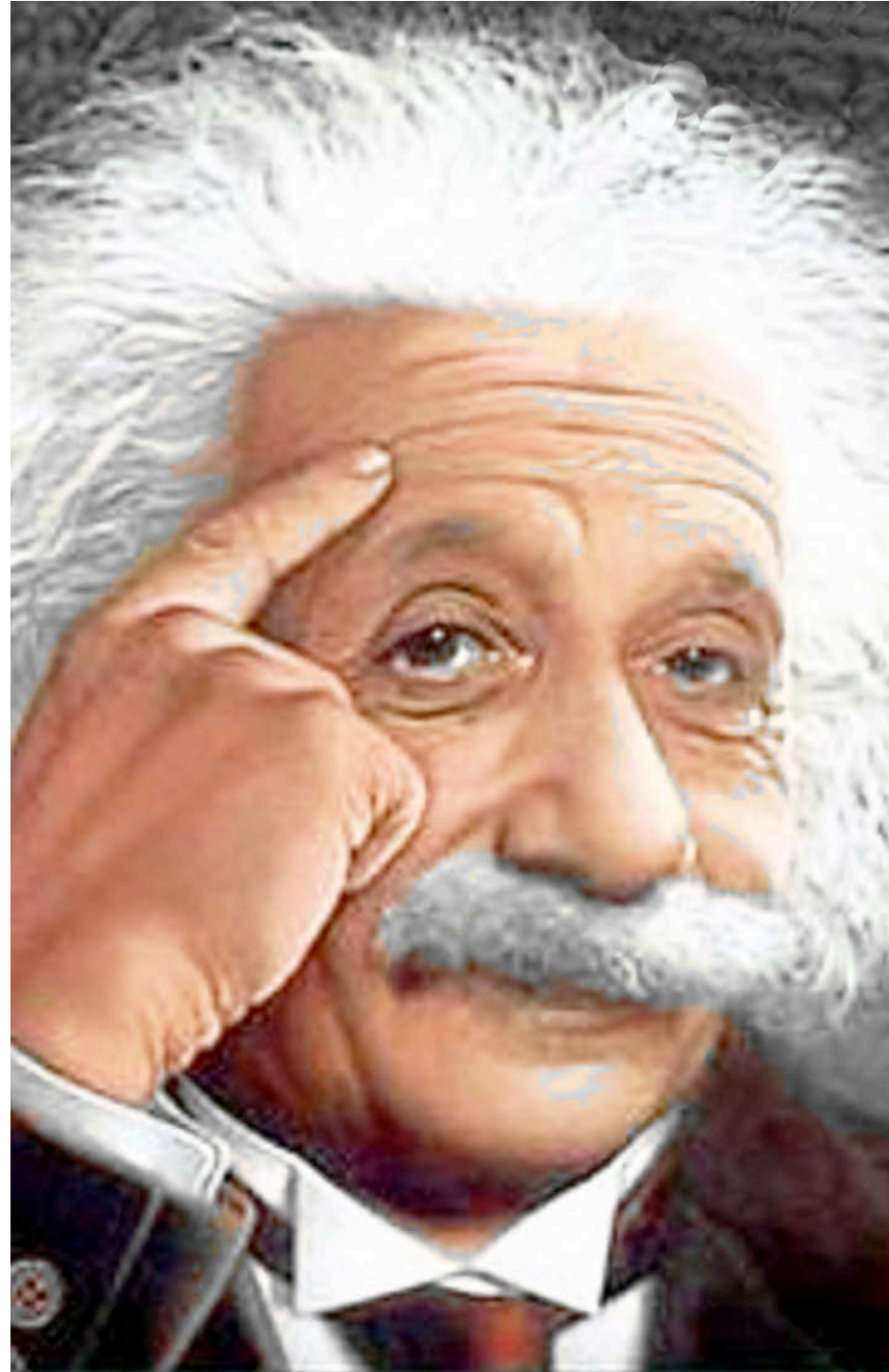
After hc1

Decreased client onboarding time by 50%

- Streamlined processes at every step to create easy onboarding and client management
- Use holistic provider profiles to plan and flawlessly execute sales strategies and communications

**“Only a life lived in the
service to others is worth
living.”**

***~Albert
Einstein***



Questions & Answers

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