This tool accompanies Lessons for Financial Success available at mgma.com/lessons. Lessons is a free, easy-to-use guide for office administrators and physicians who manage their own practices but may not have a formal business background.

**Tips for Conducting a Patient Satisfaction Survey**

Health care providers, insurers, and governmental regulators now recognize patient satisfaction as a legitimate measure of health care quality. Your practice can also utilize patient satisfaction surveys to gauge the level of quality your practice attains. Continued surveying will give you a metric of where you are now, where you are going, and where you want to be in terms of patient satisfaction.

Implementing a surveying plan can be tedious and time consuming. This guide is meant to give you tips on how to develop a patient satisfaction metric efficiently, saving both time and money.

**Implementation Steps**

1. Form a patient satisfaction team consisting of at least one physician and administrative leader. This team will help plan, develop, and implement the survey as well as be committed to the follow-up and change management process.
2. Decide whether or not your patient survey will be related to their one specific visit or if it will be related to a more general view of the practice.
3. Determine whether contracting with an outside surveying company is in the budget; if not, you should conduct the survey in-house.
4. Determine the method of data collection
   a. Handing out survey directly after visit
   b. Mail to get a random sample of patients
   c. Mail to a target population of patients
   d. Mail to all patients
   e. Telephone survey
   f. Online survey
5. Decide on the frequency of data collection
   a. Annually?
   b. Monthly?
   c. Quarterly? (Quarterly is a good choice because it eliminates possible seasonal biases)
   d. Other?
6. Decide on the subjects to be measured. Many surveys focus on communication, convenience, friendliness of staff, waiting times, and perceived quality. The subject matter should cater to your practice’s size and specialty.

7. Decide on the type of measurement in the survey. The best way is usually a consistent scale for all questions such as from “Poor” to “Excellent.” Make the survey clear, easy to follow, and short so that patients are apt to actually take the time to fill it out (see Example Patient Satisfaction Survey tool).

8. Decide how the data will be entered for analysis. This process demands a great deal of thought and planning since it will probably take up the most staff time.

9. After the data is analyzed, make sure you follow-up with the patients who left contact information. This can lend great insight into improvements that need to be made, plus it will strengthen patient-practice relations.

10. Based on the survey results, determine what types of changes need to be made within the practice to improve patient satisfaction. One of the most important aspects of perceived patient care and quality is the amount of time the physician spends with the patient, so be wary of this component of the survey.