

Secret Shopper Call Questionnaire



Secret shopper calls can be a useful strategy for understanding the patient’s experience when they call the clinic to inquire about services or make an appointment. The purpose of these calls is not to catch staff doing something wrong; rather it is a tool that can help identify opportunities for improvement. Use this questionnaire to help the caller record consistent information.¹ Family planning clinic staff can use this questionnaire to help record consistent information when making calls.

1. Select a fictional patient case.

Choose one of the examples below or create your own.

Emergency Contraception

- Unprotected sex yesterday
- Heard there was a pill available
- 17 years old
- Live in same area as clinic
- No income, don’t want parents to know
- Last menstrual period 14 days ago

Contraception

- Would like to start birth control
- Know about pills, also heard there was something that could go in one’s arm—interested in talking about options
- Live in same area as clinic, new to the area
- Income \$800 a month, no insurance
- 24 years old
- Last menstrual period 7 days ago

2. Fill out information about the fictional patient.

Fill out the information below before calling for reference.

Name of Person Calling:

Date:

Time:

Fictional Name Given:

Age:

Location:

Reason for Calling:

Other Characteristics (e.g., uninsured, don’t want parents to know, etc.):

1. Note that in some states it is illegal to record people without their knowledge.

3. Record what happened on the call.

Note: Secret shoppers should not schedule an actual appointment. End the call after the appointment time is offered but before an actual visit is confirmed.

How many times did the phone ring before it was answered?

Did you have to call more than once? Yes No

If yes, why?

Did the answerer identify the clinic and provide their name? Yes No

Answerer's name:

How many times were you put on hold?

How long were you on hold (the first time)?

When were you offered a visit? First available day # of days from today.

Did the answerer...	Yes	No	Notes
Use a warm, welcoming tone			
Have a courteous manner			
Quickly identify the caller's needs			
Answer the caller's questions			
Avoid clinical jargon			
Seem knowledgeable			

Other comments/observations: