A laboratory outreach’s logistics program impacts every aspect of service to its customers, including establishing personal relationships with each customer’s staff, maintaining safe driving habits, minimizing exposure to potentially infectious materials, ensuring optimal specimen integrity, supporting turnaround time goals, all while adhering to strict, and complex transportation regulations. Certainly, logistics is a critical support function to a laboratory that cannot be managed in a casual manner; however, it is not an impossible task.

An audience at Clinical Laboratory Management Association’s ThinkLab 2012 responded to the question prompt, “Is your courier service owned, contracted, or a combination?” Fifty-four percent of attendees responded that they purchased the service and 46 percent either owned their service or used a combination of internal and external courier support. There is no single, ideal model for an outreach courier activity; hence a manager has flexibility when developing a logistics program.

In Laboratory Outreach Couriers – Understanding the ‘What and Why,’[^1] we discussed how to evaluate customer needs, understand your outreach competition’s capabilities, and complete a courier inventory checklist. This is a necessary tool in understanding your current capabilities.

**Make Versus Buy**

When establishing or refining a courier service, many outreach programs must decide whether they should “make” or “buy” this important function.

When a laboratory owns and manages the courier function, it also has full ownership of the courier staff interactions with outreach customers. The laboratory can hire the best representatives for their outreach program and may choose to cross-train staff, assigning additional responsibilities as needed to support other areas of the laboratory. Through routine (and sometimes immediate) feedback, the laboratory will know if the courier function is meeting customer needs and expectations and can follow up with customers to make adjustments accordingly. However, creating an owned courier function has a unique set of responsibilities, including personnel management, policy and procedure development, regulatory compliance, courier scheduling and routing, insurance coverage, and vehicle purchase, maintenance, and replacement.

When a laboratory utilizes an external courier function, the contracted company assumes responsibility for all aspects. When working with an external courier, the outreach laboratory must seek a “partner” rather than a “vendor.” An external courier partner must support and promote the laboratory outreach program’s goals, provide a reliable service, and represent the laboratory in a professional manner consistent with the character of that particular organization.

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[^1]: Laboratory Outreach Couriers – Understanding the ‘What and Why.’  
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Many outreach programs use a hybrid model with both internal and external courier support. External couriers may supplement the laboratory's existing internal courier service through providing backup coverage for staff absences, STAT or on-call pickups, and/or maintaining off-shift routes or select routes in areas not routinely served.

Primary Considerations for an Owned Courier

Eliminate Logistical Redundancy – If there are other couriers within your organization who are transporting records, pharmacy, mail, or supplies throughout your target outreach geography, identify opportunities to consolidate these activities. Combining several logistical functions into a single activity will improve efficiency, reduce interruptions at the customer locations, provide continuity in service, may provide access to a broader geographic area, and, ultimately, will reduce costs.

Routes – In order to estimate staffing and vehicle needs, it is critical that you understand the level of service that you will be providing. One courier stop per day for 20 customers located within a 10-mile radius will require fewer resources than multiple stops per day across a broader geography. Also, it is important to note that urban routes will have unique requirements when compared to rural routes. It will be necessary to gather data, including address, time(s), and approximate length of time that the courier will be stopping at each location. Once the data is collected, sort it by time and location. Depending on your level of comfort with technology, you can design routes simply by using colored pushpins on a map or through routing software. There are many easy-to-use routing programs, including some that are freely available on the Internet. (To locate a variety of sites that offer routing support and products, type the phrase, “route planner” into a search engine.) Once you know the number and types of routes, you should have a better understanding of how many couriers and vehicles you will need.

Vehicles – It is necessary to provide courier vehicles that are reliable and professional in appearance. Many laboratory outreach programs will purchase or lease cars that are similar in style and color and have the hospital or laboratory logo on them. Some institutions may have fleet vehicles that are available. However, be wary of “sharing” a vehicle with another service unless absolutely necessary. This may lead to vehicle unavailability when the outreach program needs it. Regardless of who owns the vehicles, it is necessary to provide the following:

- Routine and scheduled maintenance;
- Fuel;
- Electronic toll pass (if needed);
- Car wash (weekly wash and detailing every six months);
- Insurance (vehicle and driver);
- Dedicated parking near an entrance for specimen drop-off at the laboratory; and
- Dedicated parking for idle vehicles.

Finally, you may also choose to reimburse mileage for employees that use personal vehicles. This option may be especially feasible for phlebotomists that are collecting specimens from a long-term care facility on their way to work in the laboratory.

Employees – The laboratory courier is the most frequent face of the laboratory that a customer sees; hence, it is critical to hire the best possible employees to fill this important customer service function. Before you can hire your laboratory couriers, it is necessary to identify a manager that will oversee the employees and processes. This manager can help to develop a job description for the courier. The
job description should identify the key skills that the courier must have and critical functions that he/she must fulfill. Any courier candidate must have a clean driving record and be able to safely drive in the traffic and road conditions present in the target geography. In addition to selecting primary courier staff, the manager must anticipate absences and have adequate coverage available.

**Policies and Procedures** – It is critical to develop a comprehensive set of courier policies and procedures. Couriers must demonstrate competence in all routine job functions and should know where to access procedures for less-frequent activities. A courier procedure manual must contain the following:

- Procedures for performing all functional tasks of the position
  - Expectations for dress code, behavior, and communication with clients and laboratory employees
  - Specimen packing and temperature requirements
  - Procedure for notifying the laboratory and/or the client if the courier is not on schedule
  - Procedure for notifying the client that they did not or were not able to pick up specimens (see Figure 1, page 11)
In addition to being able to perform the job functions, it is important that the courier understands the vital role that he/she plays in patient care. The bags that they are transporting contain precious specimens that were obtained through painful procedures and may be irreplaceable.

- Specimen tracking procedure (see Figure 2, page 12)
- Include copies of any forms that the courier must complete
  - Route and schedule information
  - Copy of route with all stops and scheduled times
  - Vehicle checklist (see Figure 3, page 12)
- Special-case scenarios:
  - Traffic accident protocol
  - Vehicle breakdown protocol
  - Spill kit location and instructions for use
- Route-specific instructions or policies that do not apply to the other routes.

Training – In addition to being able to perform the job functions, it is important that the courier understands the vital role that he/she plays in patient care. The bags that they are transporting contain precious specimens that were obtained through painful procedures and may be irreplaceable. A patient’s life may depend on the specimen being transported to the laboratory in an expedient and safe manner.

The courier must also be knowledgeable and compliant in all regulatory aspects of transporting biological specimens and protecting patient health information. As such, state and national regulatory agencies require annual training and competency testing. The acronyms of these national agencies and/or regulations include: Health Insurance Portability and Accountability Act (HIPAA), Occupational Safety and Health Administration (OSHA), Department of Transportation (DOT), International Air Transport Association (IATA), International Civil Aviation Organization (ICAO), etc. There are many groups that offer dangerous goods training. A free, online resource for this training can be found at www.mayomedicallaboratories.com/education/online/dangerousgoods/index.html.

Technology – It is essential that the courier can utilize all of the technology tools they need to perform his/her job. These tools include:

- Cellular telephone – Required so that the courier can communicate with the laboratory. The laboratory may choose to provide the courier with a company phone, with use restricted to business purposes only. Be sure to test the phones throughout the market area to make sure that cell phone coverage is available.
- Tracking technology – Some laboratories may invest in technology and systems that are capable of tracking specimens by barcode or radio frequency identification (RFID) tag. These tracking systems may require separate devices and the couriers must be comfortable using these devices.
- Global positioning system (GPS) technology – Many cars are equipped with GPS devices, which can aid tracking courier activity. This technology may be used to ensure adherence to schedules and routes or to locate a courier when a customer requires a STAT or on-call pickup.

Creative Alternatives – Within each outreach program, there are variables that do not fit well into any checklist. Perhaps there is a large physician office building adjacent to the laboratory, and a walking courier can effectively support the customers within that building. Or, there may be a large practice on the other side of the medical campus and a golf cart can easily transport specimens to the laboratory. Some institutions have an active troupe of volunteers that are willing to be trained in infectious hazards and can provide on-campus specimen transportation. Conversely, in areas that are extremely remote, it may not be possible to provide a routine courier service that is affordable. Perhaps an employee of that office passes by another outreach customer on their way home from work and can drop off specimens for the laboratory, and the laboratory’s courier can pick them up, along with the office that is on the route.

Primary Considerations for a Contracted Courier – The majority of this article has focused on the details of implementing an owned courier function. Simply stated, the primary variable when considering contracting with an external courier is whether or not they are able to fulfill each of these previously mentioned service and operational details to your level of satisfaction. It will be necessary to develop a contract that fully describes the services that they will provide, the associated costs, and then perform a financial comparison of the options. It is important to recognize that price should not be the sole factor when selecting a courier function. Additionally, the outreach laboratory may need to take a proactive stance when identifying the service
elements and behaviors of the contracted couriers when they are interacting with the laboratory’s customers. These elements may include employee dress code and behavior. The laboratory will expect that the courier actively solicits and reports any significant customer comments or findings that he/she encounters through their routine work.

**Conclusion**

Regardless of the courier service model that is selected, it is important to routinely monitor performance by soliciting customer feedback and adjusting services accordingly. Although the primary function of the outreach courier is to safely and effectively transport specimens to the laboratory, the courier positively impacts patient care by ensuring pre-analytic specimen quality. An effective courier is a vital business asset, soliciting customer loyalty by providing excellent customer service and professionally representing your laboratory to your outreach customers.

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**References**


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**Jane Hermansen**, MBA MT(ASCP), outreach program coordinator at Mayo Medical Laboratories, has more than 25 years of clinical laboratory experience working with hospitals in the development and expansion of their outreach programs. Her experience includes clinical research, process engineering, laboratory outreach consulting, training and facilitation and project management.

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