



Engineering the Patient Experience

Dispensing – Visit Close - Telephone

Module 4



Patient experience engineering steps

1. Examine the current clues creating patient impressions

Setting: sights, sounds, smell, tactile impressions of the physical office environment

Cast: human interactions

Process: functional steps

- Identify negative clues that sometimes occur → eliminate
- Identify neutral clues that could be made positive

2. Re-define the process to communicate positive clues and exceed expectations



Identifying current clues

1. List the normal sequence of events for each stage of the patient visit - - what usually occurs currently
2. Identify words, actions, appearances that create a negative impression
3. Identify words, actions, appearances that are neutral - - make no impression

Combustion points

- Points during a customer experience where the process sometimes breaks down and causes complaints
 - Blockage in smooth transition from stage to stage in service delivery
 - Inattention by staff
 - Communication breakdowns/misunderstandings between customers and staff
 - No one with an answer
 - Policy mismatched with customer situation

Dispensing - spectacles

Where do we go wrong? What leaves a neutral impression?

Current Steps In Process	Deficiencies, Inconsistencies, Omissions, Emotionally Neutral Events, Combustion Points		
	Setting	Cast	Process
Greeting/introduction spectacle lens presentation			
Frames choices identification			
Frames selection			
Cost presentation			
Measurements			
Hand-off			

Re-define the process: Dispensing - spectacles

(Greeting/introduction spectacle lens presentation, frames choices identification, frames selection, cost presentation, measurements, hand-off)

	Cast	Setting	Process
Competence			
Personal engagement			
Presentation			
Efficiency			

- *What do we do right?*
- *What would make this the best possible patient experience?*
- *What would exceed patient expectations?*

Dispensing – contact lenses

Where do we go wrong? What leaves a neutral impression?

Current Steps In Process	Deficiencies, Inconsistencies, Omissions, Emotionally Neutral Events, Combustion Points		
	Setting	Cast	Process
Greeting/introduction			
Trial lens try-on			
Education			
Insertion/removal training			
Cost presentation/ordering			
Hand-off			

Re-define the process: Dispensing – contact lenses

(Greeting/introduction, trial lens try-on, education, insertion/removal training, cost presentation/ordering, hand-off)

	Cast	Setting	Process
Competence			
Personal engagement			
Presentation			
Efficiency			

- *What do we do right?*
- *What would make this the best possible patient experience?*
- *What would exceed patient expectations?*

Visit close/departure

Where do we go wrong? What leaves a neutral impression?

Current Steps In Process	Deficiencies, Inconsistencies, Omissions, Emotionally Neutral Events, Combustion Points		
	Setting	Cast	Process
Greeting			
Invoice preparation/explanation			
Pre-appointment			
Collection			
Farewell			

Re-define the process: Visit close

(greeting, invoice preparation/explanation, pre-appointment, collection, farewell)

	Cast	Setting	Process
Competence			
Personal engagement			
Presentation			
Efficiency			

- *What do we do right?*
- *What would make this the best possible patient experience?*
- *What would exceed patient expectations?*

Telephone: Prospective patient

Where do we go wrong? What leaves a neutral impression?

Current Steps In Process	Deficiencies, Inconsistencies, Omissions, Emotionally Neutral Events, Combustion Points		
	Setting	Cast	Process
Inquiry about pricing			
Inquiry about appointment availability			
Inquiry about credentials			



Disney Approach to Service Excellence

Re-define the process: Telephone – prospective patient

(inquiry about pricing, inquiry about appointment availability, inquiry about credentials)

	Cast	Setting	Process
Competence			
Personal engagement			
Presentation			
Efficiency			

- *What do we do right?*
- *What would make this the best possible patient experience?*
- *What would exceed patient expectations?*

Telephone: Current patient

Where do we go wrong? What leaves a neutral impression?

Current Steps In Process	Deficiencies, Inconsistencies, Omissions, Emotionally Neutral Events, Combustion Points		
	Setting	Cast	Process
Appointment scheduling			
Product arrival			
Emergency			
Non-emergency medical question			

Re-define the process: Telephone – current patient

(appointment scheduling, product arrival, emergency, non-emergency medical question)

	Cast	Setting	Process
Competence			
Personal engagement			
Presentation			
Efficiency			

- *What do we do right?*
- *What would make this the best possible patient experience?*
- *What would exceed patient expectations?*

Appendix



Disney Approach to Service Excellence

Product Dispensing

• NEGATIVE CLUES

• POSITIVE CLUES

SETTING

- | | |
|--|---|
| ==> Optical area small, haphazard, cluttered, poorly lighted | ==> Large, well lighted optical area with broad selection |
| ==> Frames/displays appear dated | ==> Attractive displays/product demonstrations |
| ==> Frames not organized by gender/age | ==> Modern fixtures in perfect repair |
| ==> Trial contact lenses disorganized | ==> Spotless, well stocked display cases |
| ==> Minimal product selection | ==> Frames organized by gender/age/lifestyle |

CAST

- | | |
|--|---|
| ==> Mechanical, impersonal behavior | ==> Warm, personal greeting |
| ==> Acceptance of interruption while serving patient | ==> Put patient at ease |
| ==> No interest in or response to patient's choices | ==> Probes to determine satisfaction with current eyewear, desires, questions about options |
| ==> Pushy salesmanship of add-ons | ==> Assist in narrowing choices |
| ==> Hurried, impatient demeanor | ==> Handle frames like expensive jewelry |
| ==> Exaggerated product claims | ==> Compliment patient on choice |
| | ==> Thank you |

PROCESS

- | | |
|---|---|
| ==> No assistance provided to narrow choices | ==> Demonstrate knowledge of popular styles, pros and cons of options, appropriateness for facial characteristics |
| ==> Offer too many choices | ==> Reference latest new products, as appropriate |
| ==> No explanation of product features | ==> Remove rejected choices from sight |
| ==> Make assumptions about patient's inability to afford | ==> Same day dispensing |
| ==> Product delivery delayed more than one week after order | ==> Latest styles, technology available and visible |
| ==> Confusing pricing | ==> Cost clearly explained |
| ==> No advice on product usage, maintenance | ==> Usage directions provided |

Check-Out/Payment

• NEGATIVE CLUES

• POSITIVE CLUES

SETTING

- ==> Handwritten statements
- ==> Charge calculation done manually

- ==> Computer system to create statement
- ==> Attractive packaging of products

CAST

- ==> Mechanical, impersonal behavior
- ==> No one immediately available to process transaction

- ==> Cheerful, warm tone of voice
- ==> Probe to determine satisfaction with service/products
- ==> Unanticipated extras provided at no charge (frame case, cleaning supplies, etc.)
- ==> Thank you

PROCESS

- ==> Charges at variance with with expectations
- ==> Surprises
- ==> Patient required to file for insurance without office assistance
- ==> Slow credit card authorization
- ==> No returns policy

- ==> Rapid calculation of charges
- ==> Easy-to-understand statement itemizes all charges and calculates insurance
- ==> Insurance claim automated
- ==> Multiple payment methods available
- ==> All credit cards accepted
- ==> Automated credit card authorization
- ==> Satisfaction guaranteed

Product Delivery

• NEGATIVE CLUES

• POSITIVE CLUES

SETTING

==> Product stored in jumbled mound with other customer orders

==> Products delivered in quality packaging

CAST

==> Mechanical, impersonal behavior
==> No comment on product purchased

==> Warm, personal greeting
==> Patient try-on encouraged to assure satisfaction with comfort and fit
==> Compliment patient on selection
==> Reminder about next appointment
==> Thank you
==> Small gift offered (lens cleaning cloth, lens case etc)
==> Follow-up phone call to assure satisfaction

PROCESS

==> Long search to find patient's order
==> Long, unexpected delays in delivery
==> Wrong product delivered
==> Product damaged or defective
==> No instructions to optimize product usage experience
==> No package provided to assist patient in carrying products purchased

==> Quality inspection of product made in front of patient
==> Products handled with care
==> Home delivery option offered
==> Order accuracy confirmed
==> Usage and care instructions provided
==> Contact lens re-orders available on-line

Appointment Making

• NEGATIVE CLUES

• POSITIVE CLUES

SETTING

- | | |
|--|---------------------------------------|
| ==> Busy signal | ==> Immediate answer by a live person |
| ==> Long wait before human being answers phone | |
| ==> Long recorded menu of routing choices | |
| ==> Lengthy call-waiting promotional message | |
| ==> Rustling papers or typing in background | |

CAST

- | | |
|--|---|
| ==> Rushed, impersonal tone of voice | ==> Clear identification of business name, responder's name |
| ==> Interruption during conversation | ==> Cheerful, warm tone of voice |
| ==> Placed on hold without permission | ==> Enthusiasm to help caller |
| ==> Explanations of office policies and payment requirements | ==> Knowledgeable operator able to answer questions credibly, quickly, with no ambiguity or need to refer |
| ==> Evasive answers about fees | ==> Personal recognition of caller/use name in conversation |
| | ==> Endorsement of doctor's expertise |
| | ==> Verification of appointment date/time |
| | ==> Thank you for call |

PROCESS

- | | |
|---|---|
| ==> Several weeks wait for appointment | ==> Convenient office hours |
| ==> No weekend/evening hours available | ==> Desired appointment times |
| ==> Few appointment slots available | ==> On-line appointment making available |
| ==> Excessive time taken to identify appropriate appointment time | ==> On-line medical history recording available |
| | ==> Confirm insurance coverage to patient as appointment made |
| | ==> Exam fees clearly explained |

Phrases to use/phrases to avoid: Product recommendation

NEGATIVE/NEUTRAL

“Here is a brochure that lists all your options. Read it over and tell us what sounds best.”

“The cheapest way to satisfy your need is...” (price focus, insults some customers)

“This offers the best performance but it’s very expensive” (unselling)

“This is a high index lens with a 1.75 index of refraction” (feature oriented/jargon)

POSITIVE

“I recommend...”

“The best solution for your personal vision requirements is...”

“Would it be okay to recommend what I think may best satisfy your need?”

“This advanced lens is so light and comfortable you forget you’re wearing them” (benefit oriented)

Phrases to use/phrases to avoid: Transaction close

NEGATIVE/NEUTRAL

“Is there anything else you need today?”

“See the receptionist on the way out to settle your account”

“We require a deposit”

POSITIVE

“Thanks for coming”

“It was great to see you”

“We look forward to your visit next year on (date)”

“Be sure to call us right away if you have any problems with your new...”

“We appreciate your trust in us”

“How would you like to take care of that today?”

“A deposit is customary for...”

Phrases to use/phrases to avoid: Telephone appointment making/inquiries

NEGATIVE/NEUTRAL

“Hold please”

“Who’s calling?”

“The doctor is busy”

“What’s your name?”

“Call back in ten minutes”

“I don’t know”

“I can give you Tuesday at 10:00am”

POSITIVE

“Would it be okay for me to put you on hold for a moment while I finish with another patient?”

“May I tell the doctor who’s calling?”

“The doctor is with a patient”

“Could you give me a number where the doctor can call you in ten minutes when he is available?”

“Just a moment. I’ll get an answer for you”

“The doctor can see you Tuesday at 10:00am”

“Could you spell your name please?”