Mapping the customer journey for dental and medical practices

Section 1: Identify key touchpoints

Instructions: List all the critical points in the customer journey where feedback would be valuable. Think about major interactions patients have with your practice. See the example below:

Touchpoint	Description	Example interaction
Appointment booking	The initial phase where patients schedule their appointments	Online booking, phone call
Appointment reminder	How your practice reminds patients of their upcoming appointment	SMS, email, phone call
Initial consultation	The first visit when patients meet the doctor and discuss their health	First consultation, initial examination
Treatment sessions	Follow-up visits for treatments or procedures	Check-ins like blood work, fillings, orthodontics
Post-treatment follow-up	The period immediately after a treatment is completed	Follow-up calls, checkup appointments
Ongoing care	Regular visits for preventive care and checkups	Checkups, cleanings

Billing and payments	The process of handling payments and insurance claims	Payment processing, insurance handling
Other (specify)		

Section 2: Align survey questions to the touchpoints you want to receive feedback on

Instructions: List all the critical points in the customer journey where feedback would be valuable. Think about major interactions patients have with your practice. See the example below:

Note: In the interest of avoiding survey fatigue, you'd typically send one survey to collect the feedback you're looking for. This survey might include multiple survey question types.

Touchpoint	Survey type question	Example survey question
Appointment booking	CSAT	"How satisfied are you with the appointment booking process?"
Appointment reminder	CSAT	"How satisfied are you with the reminders you received about your appointment?"
Initial consultation	Five-star	"How would you rate your initial consultation with our provider?"
Treatment sessions	CES	"How easy was it to understand and follow the treatment plan?"
Post-treatment follow-up	CSAT	"How satisfied are you with the follow-up care after your treatment?"

Ongoing care	Five-star	"How would you rate your recent checkup/cleaning?"
Billing and payments	CES	"How easy was it to handle your billing and insurance process?"
Other (specify)		

Section 3: Determine which touchpoints to cover in your first survey and any subsequent surveys

Instructions: Decide what touchpoints you want feedback on from your first survey and what you might collect feedback on later in the customer journey.

Example touchpoints you might want to collect feedback on and the timing buckets they fit into:

First 30 days survey	First 60 days survey	90 days + survey
- Appointment booking - Initial consultation - Post-treatment follow-up - Billing and payment	- Ongoing care - Ongoing treatment sessions	- Ongoing treatment sessions - Checkup - Reminders to schedule routine care

Section 4: Visualize the customer journey

Instructions: Create a visual representation of the customer journey with mapped survey points, frequency, and planned actions. Use the following table to draft your visualization.

Journey stage	Touchpoint	Survey type	Timing bucket	Actions/Analysis	Notes
Appointment booking	Online booking, phone call	CSAT	First 30 days survey	**RACI**: Assign R (Responsible) to the Reception team to analyze satisfaction. **Analysis**: Identify improvement areas, share feedback with the practice manager (A-Accountable), and develop an action plan (C-Consulted). **Communication**: Share insights in a monthly review meeting (I-Informed).	Capture satisfaction with the booking process
Appointment reminder	SMS, email, phone call	CSAT	First 30 days survey	**RACI**: Assign R (Responsible) to the Reception team to analyze satisfaction. **Analysis**: Identify improvement areas, share feedback with the practice manager (A-Accountable), and develop an action plan (C-Consulted).	Capture satisfaction with the booking reminder process

				Communication: Share insights in a monthly review meeting (I-Informed).	
Initial consultation	First consultation	Five-Star	First 30 days survey	**RACI**: Doctor as R for assessing initial consultation feedback. **Analysis**: Improve consultation process, address patient concerns. **Communication**: Report findings in monthly staff meetings (A: Practice Manager, C: Dental Hygienist or Nurse Team, I: Reception Team).	Get feedback on the initial consultation experience
Treatment sessions	Checkup, cleanings, fillings, etc.	CES	First 30 days survey	**RACI**: Treatment team as R for identifying friction points. **Analysis**: Enhance treatment process, track common issues. **Communication**: Weekly team meetings to discuss improvements (A: Lead Practitioner, C:	Understand ease of treatment and communication

				Practice Manager, I: Medical Assistants).	
Post-treatment follow-up	Follow-up calls	CSAT	First 60 days survey	**RACI**: Follow-up care team as R to evaluate follow-up satisfaction. **Analysis**: Implement improvements based on feedback. **Communication**: Monthly operations review to discuss findings (A: Practice Manager, C: Treatment Team, I: Reception Team).	Ensure satisfaction with follow-up care
Ongoing care	Regular checkups	Five-Star	90+ days survey	**RACI**: Hygienists or nurses as R for monitoring ongoing care satisfaction. **Analysis**: Continuous improvement in patient care. **Communication**: Share results in biannual strategy sessions (A: Practice Manager, C: Hygienist or Nurse Team, I: Assistants).	Continuous monitoring of ongoing care satisfaction

Billing and payments	Payment processing	CES	First 30 days survey	**RACI**: Billing team as R for assessing payment process ease. **Analysis**: Streamline billing and insurance processes. **Communication**: Monthly finance review to discuss findings (A: Practice Manager, C: Billing Team, I: Reception Team).	Feedback on the ease of billing and insurance handling
Other (specify)					

Tips for completing the worksheet

- **Collaborate**: Involve team members from different departments (e.g., reception, dental hygienists, nurses, billing) to get a comprehensive view of the customer journey.

- **Be specific**: Clearly define each touchpoint and ensure the survey questions are relevant and actionable.

- **Keep it simple**: Avoid overwhelming patients with too many surveys. Balance the need for feedback with the patient experience.

- **Iterate and improve**: Regularly review and update the journey map based on feedback and changing business needs.

- **RACI framework**: Utilize the RACI framework (Responsible, Accountable, Consulted, Informed) to ensure clear ownership and effective action on feedback.

- **Communication**: Establish a clear plan for sharing feedback insights with relevant stakeholders to drive changes based on the collected data.

Worksheet template: Mapping the customer journey for dental and medical practices

Now try filling it out for your own practice:

Section 1: Identify key touchpoints

Touchpoint	Description	Example interaction
Appointment booking	The initial phase where patients schedule their appointments	Online booking, phone call
Appointment reminder	How your practice reminds patients of their upcoming appointment	SMS, email, phone call
Initial consultation	The first visit when patients meet the doctor and discuss their health	First consultation, initial examination
Treatment sessions	Follow-up visits for treatments or procedures	Check-ins like blood work, fillings, orthodontics
Post-treatment follow-up	The period immediately after a treatment is completed	Follow-up calls, checkup appointments
Ongoing care	Regular visits for preventive care and checkups	Checkups, cleanings

Billing and payments	The process of handling payments and insurance claims	Payment processing, insurance handling
Other (specify)		

Section 2: Align survey questions to the touchpoints you want to receive feedback on

Instructions: List all the critical points in the customer journey where feedback would be valuable. Think about major interactions patients have with your practice. See the example below:

Note: In the interest of avoiding survey fatigue, you'd typically send one survey to collect the feedback you're looking for. This survey might include multiple survey question types.

Touchpoint	Survey type question	Example survey question
Appointment booking		
Appointment reminder		
Initial consultation		
Treatment sessions		
Post-treatment follow-up		
Ongoing care		

Billing and payments		
Other (specify)		

Section 3: Determine which touchpoints to cover in your first survey and any subsequent surveys

Instructions: Decide what touchpoints you want feedback on from your first survey and what you might collect feedback on later in the customer journey.

Touchpoint	When it occurs	Rationale
Appointment booking		
Appointment reminder		
Initial consultation		
Treatment sessions		
Post-treatment follow-up		
Ongoing care		
Billing and payments		
Other (specify)		

Example touchpoints you might want to collect feedback on and the timing buckets they fit into:

First 30 days	First 60 days	90 days +
• Appointment booking • Initial consultation • Post-treatment follow-up • Billing and payment	• Ongoing care • Ongoing treatment sessions	• Ongoing treatment sessions • Checkup • Reminders to schedule routine care

Section 4: Visualize the customer journey

Instructions: Create a visual representation of the customer journey with mapped survey points, frequency, and planned actions. Use the following table to draft your visualization.

Journey stage	Touchpoint	Survey type	Timing bucket	Actions/Analysis	Notes
Appointment booking					

Appointment reminder					
Initial consultation					
Treatment sessions					

Post-treatment follow-up					
Ongoing care					
Billing and payments					
Other (specify)					

Tips for completing the worksheet

- **Collaborate**: Involve team members from different departments (e.g., reception, dental hygienists, nurses, billing) to get a comprehensive view of the customer journey.

- **Be specific**: Clearly define each touchpoint and ensure the survey questions are relevant and actionable.

- **Keep it simple**: Avoid overwhelming patients with too many surveys. Balance the need for feedback with the patient experience.

- **Iterate and improve**: Regularly review and update the journey map based on feedback and changing business needs.

- **RACI framework**: Utilize the RACI framework (Responsible, Accountable, Consulted, Informed) to ensure clear ownership and effective action on feedback.

- **Communication**: Establish a clear plan for sharing feedback insights with relevant stakeholders to drive changes based on the collected data.