

# Patient Journey Mapping

the  
invisible  
orthodontist

## Secret Shopper Call Audits

Auditing new patient call handling, building action plans to tighten up identifying emotional buying behaviours

## PRM Action Steps Focus

Revisit of 'non converter' actions sets and nurture workflows. As behavior shifts, we need to make sure that we are aware and aligning with this change.

## CRM Usage Audits

Identify opportunity areas for members and recommend where to spend energy for maximum benefit.

## TC Conversion Infrastructure

Review current TC trackers, conversion rates vs averages and build action plans to sharpen closing at the consult.

## Share Eco-Insights With Team

What does it mean to them in their roles and what impact will they see or feel and how do they need to adapt to counter it.

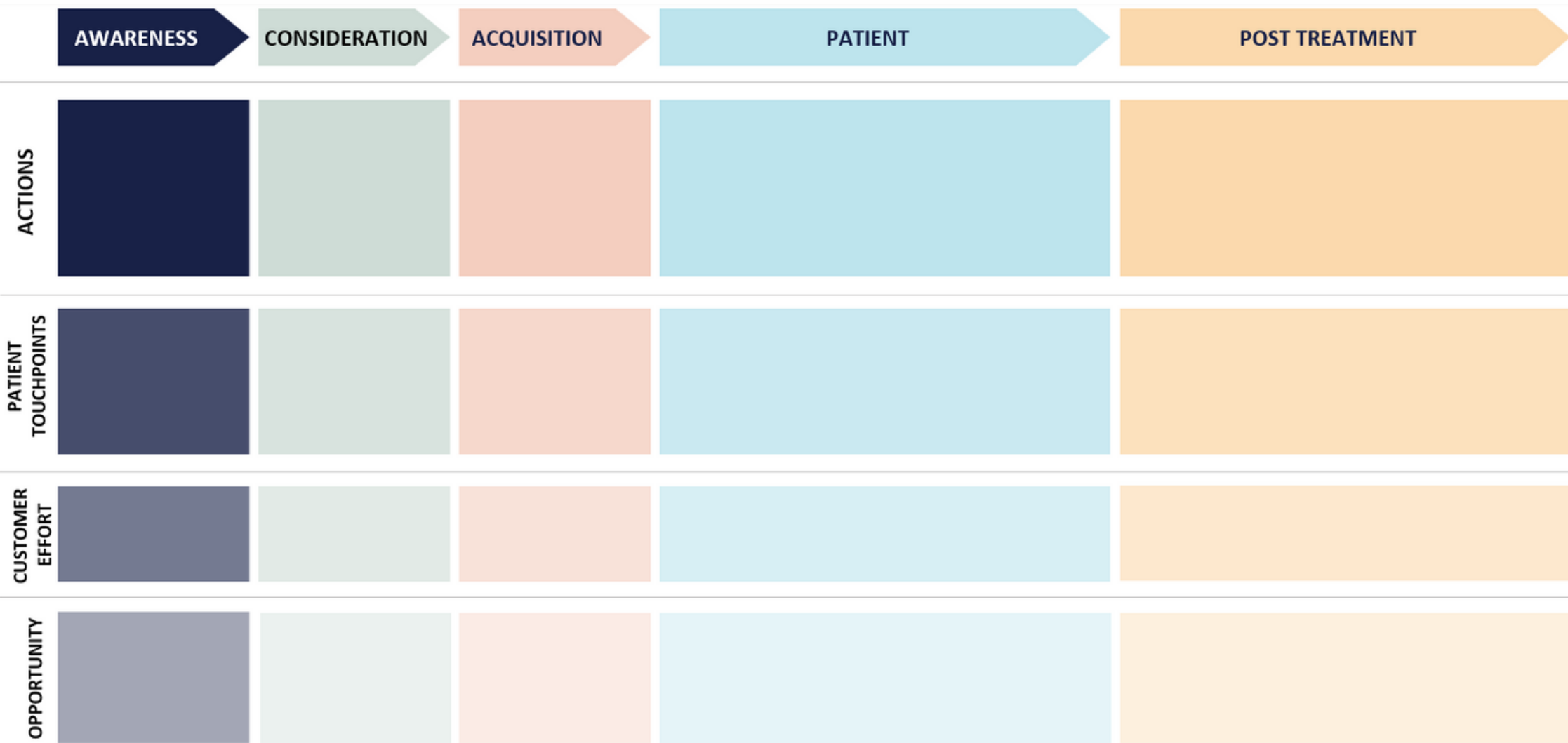


**Prospect  
Journey**

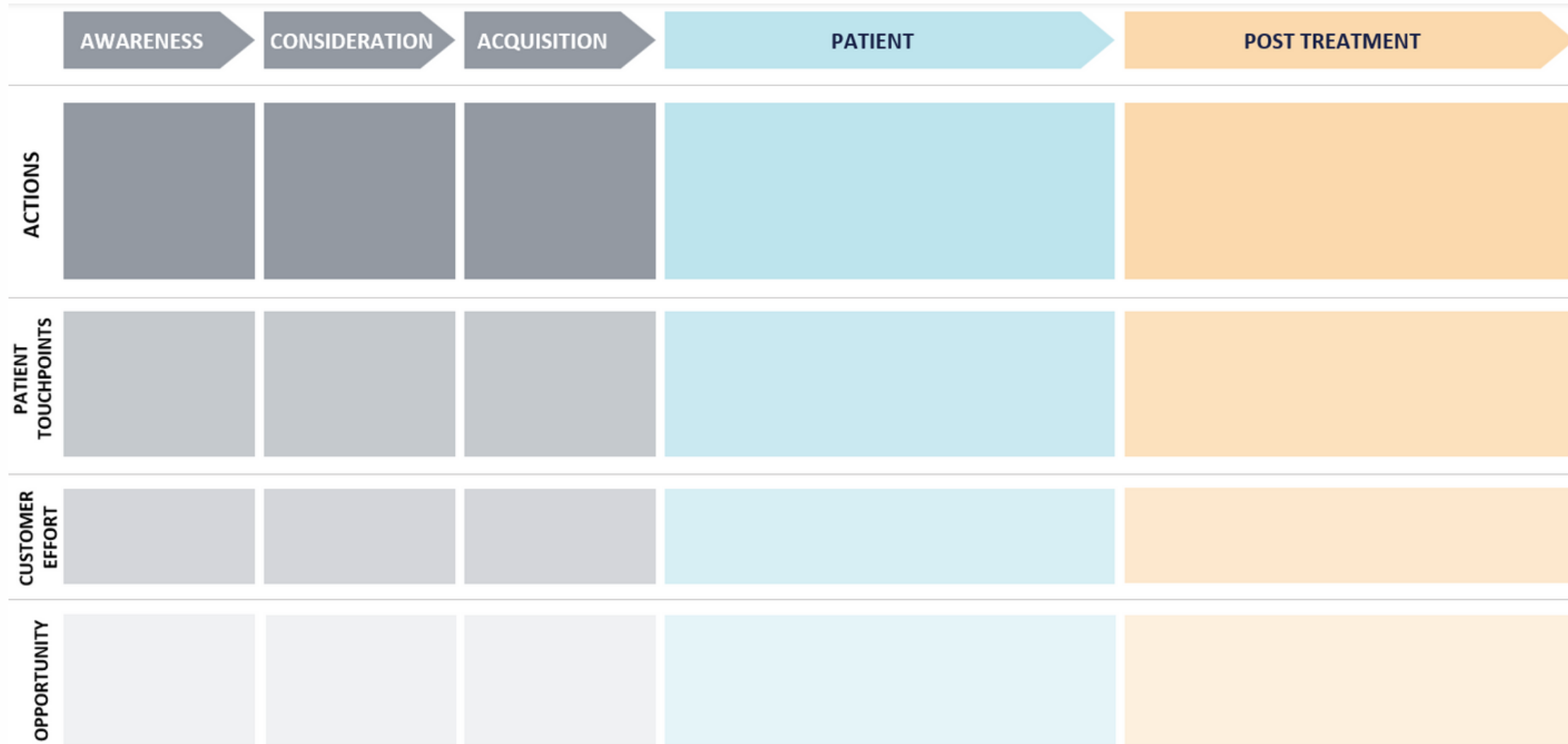
## CRM Source Reviews

Cleansing sources in PRM to ensure accurate reporting ahead of drive-in referrals for phase 2.

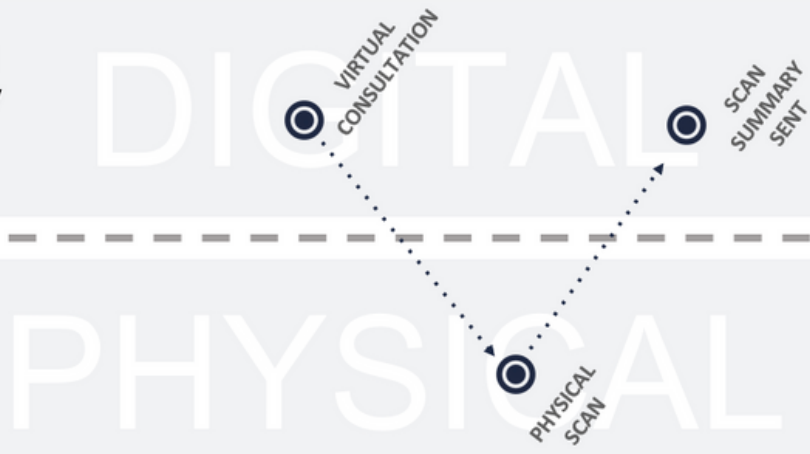
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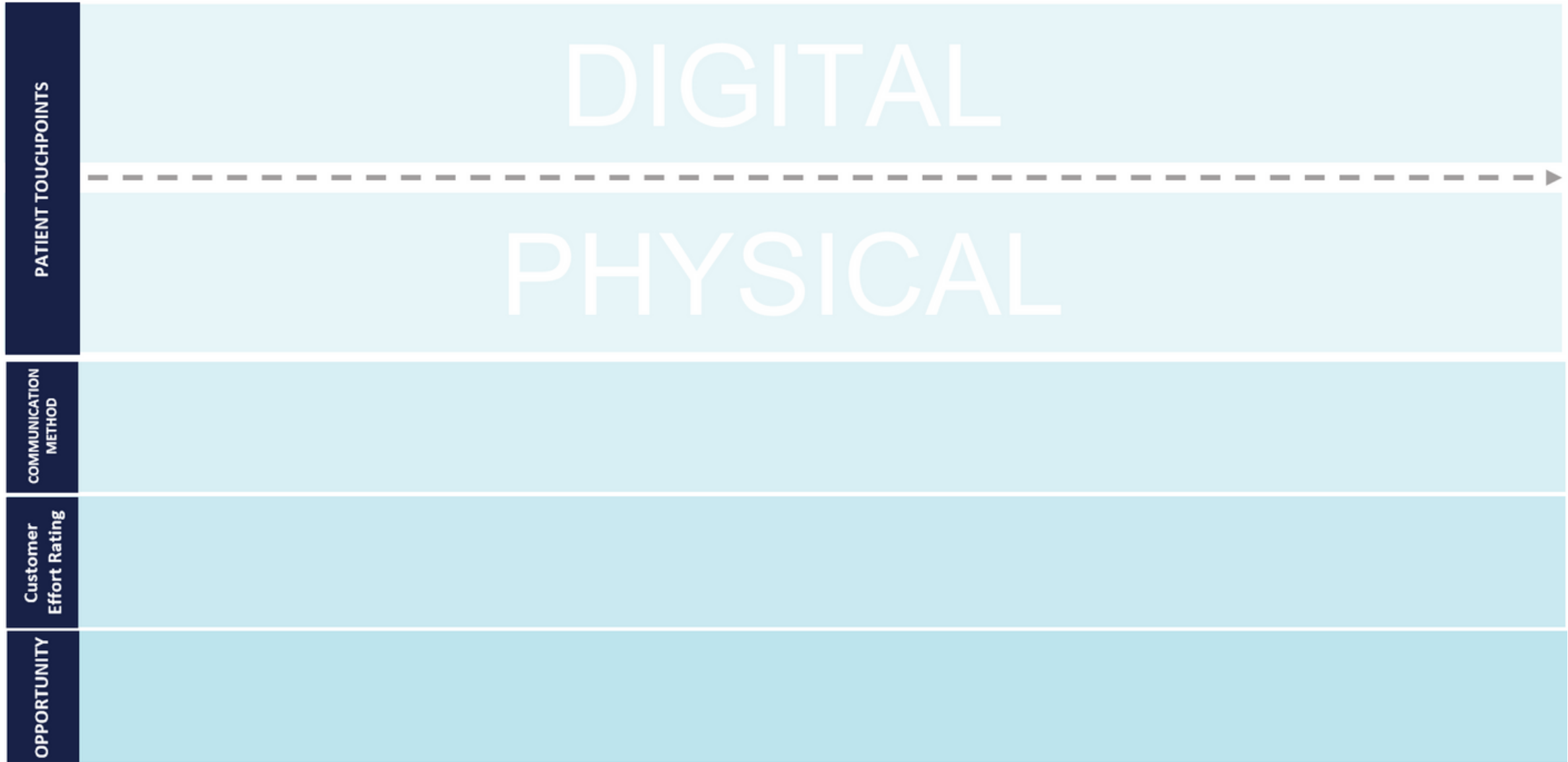
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# PATIENT MAPPING JOURNEY - GUIDANCE SHEET

PATIENT TOUCHPOINTS	<p>Consider all the touchpoints that the patient will need to go through in a standard patient journey and note these down in the respective Digital or Physical section.</p> 
COMMUNICATION METHOD	<p>Once the above section/s have been completed, write here how the touchpoint happens. For example, is it via phone, email, in person etc.</p>
Customer Effort Rating	<p>Consider how much effort is required from the patient to complete each step on a scale of 1 (effortless) - 10 (maximum effort)</p>
OPPORTUNITY	<p>Put yourself in the patient's shoes and think about how existing processes could be improved from a CX perspective.</p>
	<p>VIA ZOOM</p>
	<p>4</p>
	<p>PRACTICE VISIT</p>
	<p>7</p>
	<p>VIA EMAIL</p>
	<p>3</p>
	<p>Can we make email clearer and easy to understand. Do not use jargon.</p>

# PATIENT MAPPING JOURNEY - **IN TREATMENT**



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