



Walk-Through Checklist

By Mary Schmidt

This checklist will help you analyze each area of your practice to determine if it is operating at its maximum potential. Each doctor and staff member should walk through the office individually and complete their own checklist methodically moving step-by-step through the entire office.

Evaluate everything from a systems point of view and, at each area, ask yourself the following questions: Do I know what to do here? What does the patient think when they see this? How could this improve? Don't rush through the process. Sit where the patient sits and look around. What do you see? What do you hear? Does it represent the image you want for the practice?

Parking Lot

Accessibility:

Identifiable, signage:

Cleanliness:

What do patients see?

What's good?

Patient expectations: What are they? Are they being met, exceeded?

What could be done differently?

Does it match the Mission Statement?

My perceptions:

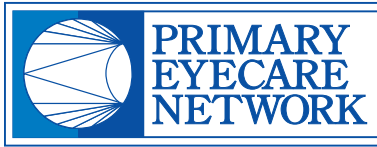
Front Entrance

Signage, hours posted:

Clean:

What do you notice?

My perceptions:



Reception Area

What happens? Does the patient know what to do?

Greeting by receptionist: (Role-play greeting.)

Appearance of staff:

What do you see? Decor, cleanliness:

Sit & observe in silence. Physical comfort:

Magazines, printed information, pamphlets:

Welcome to office, info about the doctors:

What's good?

Waiting time: (Role-play what is said.)

What could be done differently?

How is this fitting with the Mission Statement?

Patient expectations: What are they? Are they being met, exceeded?

My perceptions:

Transition to Pre-Test & Pre-Testing

Decor:

Cleanliness, hand washing:

Comfort:

How is message conveyed? What is said? Scripts? (Role-play new message.)

Are the benefits to the patient explained?

What's good?



Transition to Pre-Test & Pre-Testing (cont.)

What could be done differently?

Patient expectations: What are they: Are they being met, exceeded?

Is this fitting with the Mission Statement?

My perceptions.

Transition to Exam & Exam

Decor:

Cleanliness, hand washing:

Comfort:

Discussions - findings, next visit, referrals, fee presentation:

Staff aware of what happens in exam room?

What's good?

What could be done differently?

Patient expectations: What are they? Are they being met, exceeded?

Is the Mission Statement being fulfilled?

My perceptions.

Transition to Contact Lens Training & CL Training

Decor:

Cleanliness, hand washing:

Comfort:



Transition to Contact Lens Training & CL Training (cont.)

What's good?

What could be done differently?

Patient expectations: What are they? Are they being met, exceeded?

Going the extra mile - sunglasses, solutions, tip sheets:

Is Mission Statement being fulfilled?

My perceptions:

Transition to Dispensary & Dispensary

Decor, visual merchandising:

Cleanliness:

Comfort:

How are needs assessed?

Niche marketing:

Multiple pairs - all options, duty to warn:

When will glasses be ready? (Role-play response.)

What's good?

What could be done differently?

Patient expectations: What are they? Are they being met, exceeded?

Is Mission Statement being fulfilled?

My perceptions:



Transition to Front Desk & Departure

Decor:

Accessibility, comfort:

Cleanliness:

Signage/policy:

Payments:

Review instructions:

Pre-appointing:

What's good?

Patient expectations: What are they? Are they being met, exceeded?

What could be done differently?

Is the Mission Statement being fulfilled?

What's the last thing said? Done?

My perceptions:

List Areas of Strength

List Areas to Improve