

Answer each question on a scale from 1 to 10, with 1 representing the most disappointing new patient experience and 10 representing the best. As your benchmark, use the best service you have ever received by any organization in any industry.

1) How would you rate the quality of the new patient telephone call in your practice for each area?

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|--|---|---|---|---|---|---|---|---|---|----|
| a. Pleasantness | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| b. Answering initial patient inquiry | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| c. Educating the patients about this practice, and why it benefits the patient | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| d. Securing a visit to the practice | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| e. Obtaining critical information about the patient | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| f. Preparing the patient for the first visit | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

2) How would you rate the first visual impression of your facility?

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|--|---|---|---|---|---|---|---|---|---|----|
| a. Ease of finding your facility | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| b. Ease of access to facility and parking | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| c. Initial visual impression of front entrance to practice | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| d. First impression of facility upon entering the practice | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| e. A closer inspection of reception area | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

3) How would you rate the first greeting and team-patient interaction?

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|--|---|---|---|---|---|---|---|---|---|----|
| a. Eye contact, initial greeting warm, friendly | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| b. Proper name and title introduced, use of patient name and welcome | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| c. Asking the patient what we can get them upon arrival | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| d. Soft introduction to the advocate's role and intake interview | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

4) How would you rate the intake interview?

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|---|---|---|---|---|---|---|---|---|---|----|
| a. Relaxed, controlled, attentive | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| b. Bonding for trust | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| c. Gathering of data | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| d. Overview of visit | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| e. Explanation of practice philosophy & DDS background | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| f. Requesting of information about the patient | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| g. Beginning of the advocate process | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| h. Patient compliant, open, relaxed and ready to receive and give information | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

5) How would you rate the "hand-off" of the patient after the intake interview?

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|--|---|---|---|---|---|---|---|---|---|----|
| a. Movement throughout the practice controlled, professional | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| b. Personal introductions done | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| c. Comforting dialogue reassures patient | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| d. Patient knows what's happening, why, who is involved | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| e. Assistant demonstrates care and comfort | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| f. Introduction of the DDS | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| g. First impressions of the DDS | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |