



A C A D E M Y  
F O R E Y E C A R E  
E X C E L L E N C E .

*CIBA*  *VISION.*

# The Patient Experience

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# The Patient Experience

(Practice Administration–Patient Communication)

**Behavioral objectives:** The purpose of this module is to explain a structured approach to formulation of optometric office processes to assure a favorable patient experience. The student will develop an understanding of how patients evaluate the eye care experience and a sensitivity to the importance of the details of the sensory clues that patients perceive during the stages of their office visit. The student will learn that clinical outcome is only one aspect of optometric success.

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# What Patients Expect

## RATIONAL, FUNCTIONAL BENEFITS

- Expert diagnosis and prescription
- Efficient office process
- Functional, durable vision correction devices

## POSITIVE EMOTIONAL FEELINGS

- Peace of mind—in good hands, trusting
- Cared for
- Understood, listened to
- Self-image enhanced
- Life improved
- Appreciated



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# Memorable Service

- **Patients rarely remember or talk about the rational, functional benefits received during an office visit**
  - Expected, taken for granted and unable to judge relative value
  - Impersonal and mechanical
  - Emotionally neutral
- ***Memorable service results from positive or negative emotional feelings about the office experience***
  - How was I treated?
  - Do they value the relationship with me?
  - Do I trust them to care for my vision?
  - Do they pay attention to me?
  - Am I better off after the experience?



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# How Patients Perceive an Office Experience

- Patients receive thousands of impressions or “clues” about the practice during every instant of interaction (sights, sounds, smells, tactile sensations, etc)
- A patient’s overall impression is based on an emotional, mostly sub-conscious calculation of the positive and negative “clues” perceived during interaction with the practice
- Strong negative clues will cancel all positive clues received



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# Patient Experience Engineering Goals

- Deliver functional benefits efficiently
- Create an *emotionally memorable* experience that patients will talk about

*Outstanding patient experiences must be planned and predictable, not random and occasional*

# Patient Experience Engineering Steps

The basic process of engineering the patient experience has three steps

- Step One** → Define the desirable feelings to be created with patients during the office visit—the “service themes”
  
- Step Two** → Examine the “clues” communicating the service themes at each moment-of-truth during the current patient experience—identify and eliminate negative clues
  
- Step Three** → Make neutral clues positive and design new clues to communicate the service themes



# Universal Eye Care Service Themes

(how patients want to feel after their visit)

“I have a  
competent  
provider”

- “It’s a clean, orderly place”
- “They use the latest technology”
- “They are up-to-date medically”

“I am cared for”

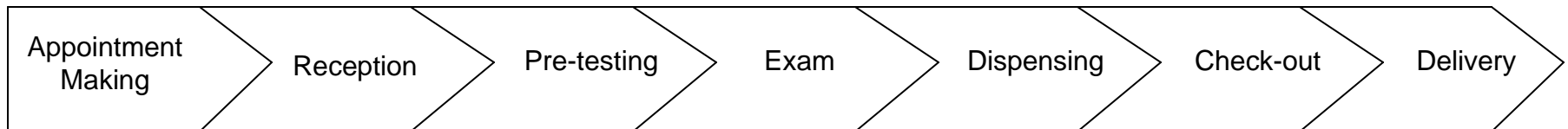
- “They put my welfare first”
- “I am welcome and appreciated”
- “They listen to me to understand my needs”
- “They will be here tomorrow”
- “They value the long-term relationship”
- “I trust these people”

“My life has  
been  
improved”

- “I am better off after the visit than before—my life is improved”
- “I feel better about myself”
- “They helped me find the perfect vision solution”

# The Patient Experience Stages

“The patient journey through the practice”



Patient experience engineering analyses the clues patients perceive at each stage of an office visit



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# Patient Experience “Clues”

## — CATEGORIES —

- Setting** → Sights, sounds, smells and tactile impressions of the physical environment of the office
- People** → Human interactions: words, gestures, tone of voice, facial expressions and body language
- Process** → Functional steps and process flow

# Experience “Clues”

Experience categories	Patient Feelings		
	Negative	Neutral	Positive
	-	0	+
Setting			
People			
Process			
<b>Result:</b>	↓ Negative memory ↓ Abandon practice ↓ Negative referral	↓ No memory ↓ No loyalty	↓ Positive memory ↓ Referrals



# RECEPTION

## Negative Clues

## Positive Clues

### Setting

- No accessible parking
- Furniture dated, soiled
- Employees in casual clothing
- Bathrooms not spotless
- Half-filled coffee cups on tables
- Displays dated and chaotic

- Comfortable, well-lit and neat reception area
- Framed pictures demonstrating community involvement
- Muted décor and natural materials
- Employees in professional uniforms
- Spotless restrooms

### People

- No acknowledgement of patient's arrival
- No welcome
- Impersonal and neutral tone of voice
- No eye contact
- Gossiping employees

- Immediate warm welcome
- Greeted by name
- Probes about vision needs
- Verbal reinforcement of doctor's expertise
- Escorted to pre-test area

### Process

- Lengthy and repetitive paperwork
- Directions emphasize policies, limitations, regimentation
- Insurance eligibility unclear

- File ready on arrival
- Insurance coverage pre-confirmed
- Medical records automated
- Immediate indication when exam will begin

# PRE-TESTING

## Negative Clues

## Positive Clues

### Setting

- Pre-testing area cluttered
- Chin rests smudged and oily
- Technician wearing casual clothing and footwear

- Equipment is high tech and up-to-date
- Equipment is spotless and cleaned in front of patient
- Technician wearing nametag with title

### People

- Interruptions permitted
- Technician unable to answer simple questions
- Technician uses jargon and technical words

- Warm, personal greeting
- Undivided attention
- Reference to patient's family, lifestyle and medical history
- Verbal reinforcement of doctor expertise and concern for ocular health
- Probes about problems and needs
- Thank you for trust

### Process

- Equipment not functioning properly
- Re-testing required
- Reason for procedure unclear

- Equipment layout enables efficient flow
- Efficient, rapid and self assured usage of equipment
- Purpose of each test briefly explained in layman's language

# EXAM

## Negative Clues

## Positive Clues

### Setting

- Equipment dated and in poor repair
- Doctor wearing casual clothing

- High tech equipment
- Computer simulations and imaging
- Wash hands in front of patient
- Freshly painted and spotless exam room
- Computerized records

### People

- Several minute wait in chair before doctor arrives
- No dialogue
- Doctor stands while talking to patient
- No eye contact
- Interruptions accepted
- Impatient and rushed behavior

- Greeted by name
- Personal small talk
- Handshake
- Unrushed subjective refraction
- Probes about vision needs
- Recommendation on best product solution

### Process

- No explanation of results

- Test results explained in layman's language
- Computer-generated exam summary

# DISPENSING

## Negative Clues

## Positive Clues

### Setting

- Optical area small and poorly lighted
- Limited or dated frames selection
- Few upper end frames displayed
- Disorganized displays
- Disorderly storage of trial contact lenses

- Attractive, well stocked displays and informative product demonstrations
- Broad selection of latest styles
- Organized, neat appearance

### People

- Mechanical, impersonal behavior
- Rushed, impatient demeanor
- Self-serving recommendations
- Pushy salesmanship and exaggerated claims
- Minimal discussion, eye contact
- Recommendations reflect no understanding of patient

- Probes to uncover problems and desires
- Undivided attention
- Frames handled like jewelry
- Patience
- Compliment choices

### Process

- No assistance to narrow choices
- No explanation of features, benefits
- Long or indefinite wait for product delivery

- Demonstrate knowledge of options
- Advice to narrow choice
- Same day dispensing
- Usage tips



# Further Reading

- *Be Our Guest*; Disney Institute
- *Managing the Customer Experience*; Smith and Wheeler
- *Clued-in*; Carbone
- *The Experience Economy*; Pine and Gilmore
- *How Customers Think*; Zaltman

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