

## Nine Patient Touchpoints: Quick Audit Tool

Rate each area from 1 to 5. Use the notes section for action items or comments.

1: Off Track – Consistently underperforming, requires immediate attention

2: Developing – Some systems in place, but gaps are impacting patient experience






3: On the Radar – Functional but consistent, room for growth

4: Solid Foundation – Performing well; minor improvement could make it exceptional

5: Standout Experience – Consistently exceeds expectations; a model for best practice

Touchpoint	Question	Score (1-5)	Notes/Action Steps
<b>Initial Exposure</b>	How does your brand appear online (website, reviews, ads, social media)?		
<b>Inquiry &amp; Scheduling</b>	Is it easy for patients to call, email, or book online? Are staff friendly and efficient?		
<b>Pre-Visit Communication</b>	Are appointment reminders, directions, paperwork, and FAQs sent clearly and timely?		
<b>Arrival &amp; Check-In</b>	Is the front desk welcoming, efficient, and organized? Are wait times acceptable?		
<b>Clinical Encounter</b>	Are providers empathetic, prepared, and engaging? Are questions encouraged?		
<b>Checkout &amp; Post-Visit</b>	Are next steps, follow-ups, and billing explained clearly?		
<b>Post-Visit Billing</b>	Are statements accurate, easy to understand, and sent in a timely manner?		
<b>Post-Visit Follow-Up</b>	Are follow-up calls, test results, or surveys conducted consistently?		
<b>Long-Term Relationship</b>	Is there a system for re-care, newsletters, loyalty programs, or patient appreciation?		

**Overall Score:** \_\_\_\_ / 45

Score Range	Rating	Interpretation	Recommended Action
9 – 18	 High Risk Zone	Multiple breakdowns in the patient journey. The experience is likely harming reputation and retention.	Immediate intervention and cross-functional strategy meeting required. Prioritize top 3 failing touchpoints.
19 – 27	 Vulnerable Zone	Inconsistent experience. Some areas function well, but others may lead to dissatisfaction or patient leakage.	Conduct focused audits and assign departmental leads to improve key gaps. Track changes monthly.
28 – 36	 Stable Zone	Generally positive experience with a few weak spots. Patients are likely satisfied, but improvement could drive loyalty and growth.	Celebrate wins, optimize average areas, and explore training or automation opportunities.
37 – 41	 Optimized Zone	Strong performance across touchpoints. Patients likely have a seamless and positive experience.	Continue reinforcement and coaching. Identify what's working to replicate success in other areas.
42 – 45	 Gold Standard Zone	Best-in-class patient experience. High trust, loyalty, and referral potential.	Share success stories, submit for recognition, and consider using this as a model for multi-site training.

**Turn Insight into Impact:** You've taken the first step by auditing your patient touchpoints—now take the next step with expert support.

**Contact HMCG** to schedule a comprehensive **Nine Pillars Practice Review**.

We'll dive deeper into each phase of the patient journey, uncover operational blind spots, and deliver actionable strategies to:

- Improve first impressions and online reputation
- Streamline scheduling and front-desk efficiency
- Enhance clinical engagement and follow-up systems
- Boost patient loyalty, reviews, and retention

**Ready to elevate your patient experience and grow your practice?**

Email us at [info@hmcgllc-us.com](mailto:info@hmcgllc-us.com) or visit [www.hmcgllc-us.com](http://www.hmcgllc-us.com) to get started.

*Because a remarkable patient experience doesn't happen by accident—it happens by design.*