

# Strategies for Thriving in a Changed World: The Patient Journey

**Michele Ahlman**

**Owner**

Clear Digital Media

**Carla Hoffman**

**Owner**

Hoffman Hearing Solutions



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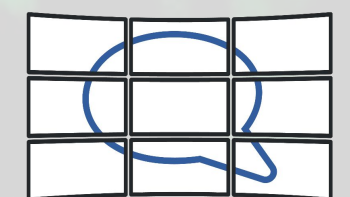
# THE WORLD CONTINUES TO CHANGE

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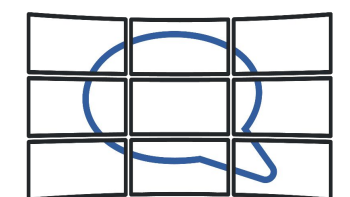
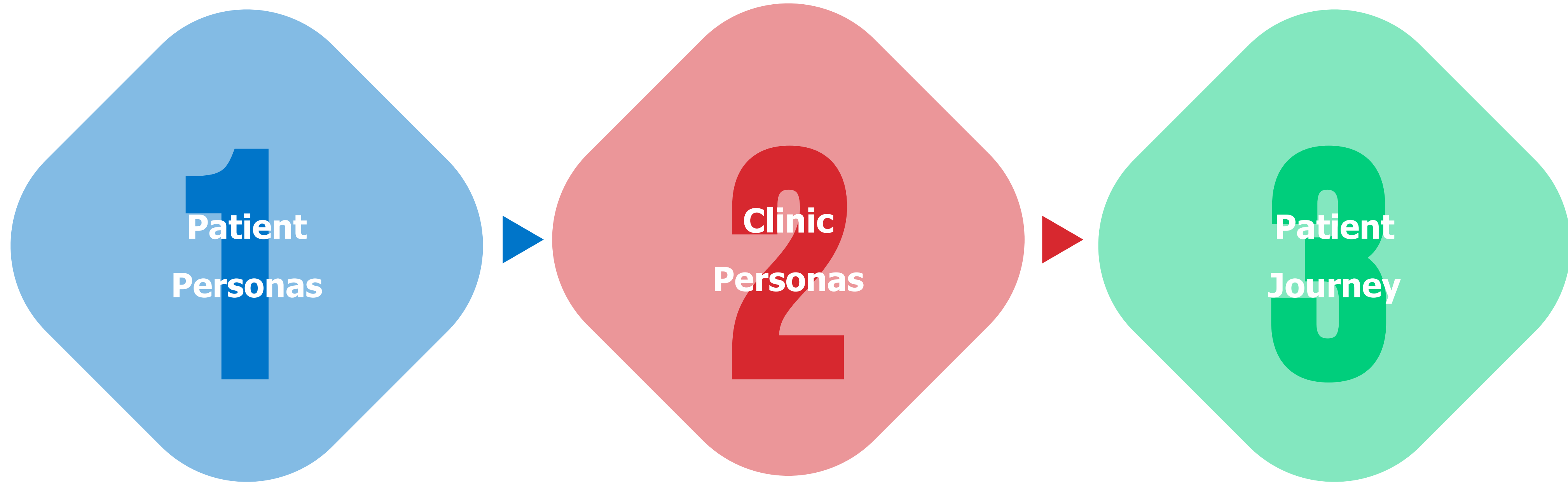
Feels like “The Matrix” could actually be **REAL!**

We’ve been tested and we’ve grown stronger.

Today we explore simple time-tested strategies & tools that position your clinic to thrive in an ever changing world.



# TOOLS WE WILL CREATE

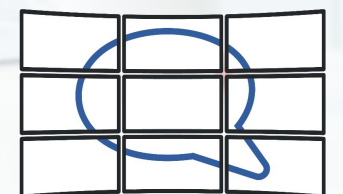




# NOT YOUR ORDINARY PRESENTATION

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- More of a workshop than presentation
- Walk through developing a patient & clinic persona & patient journey map
- Worksheets provided
- Work independently or with your team
- Will have a Q&A after each section workshop





# The Patient Journey

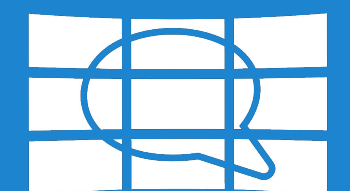
.Overview



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# PATIENT PERSONAS





# PATIENT PERSONA

ENTER PATIENT NAME HERE: \_\_\_\_\_

## GOALS AND VALUES

Goals:

Values:

Age:

Gender:

Marital Status:

Age of Children:

#/Age of Grandchildren:

Location:



Quote:

Occupation:

## CHALLENGES & PAIN POINTS

Challenges:

Pain points:

# WHAT IS A PATIENT PERSONA

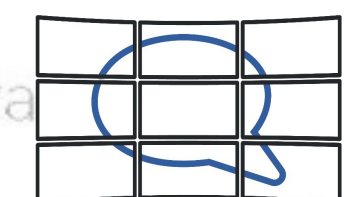
## SOURCES OF INFORMATION

Books:

Magazines:

## OBJECTIONS & ROLE IN PURCHASE PROCESS

Objections to Moving Forward



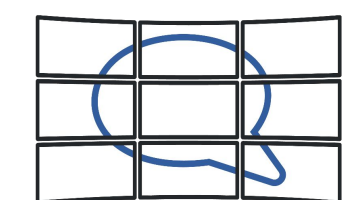
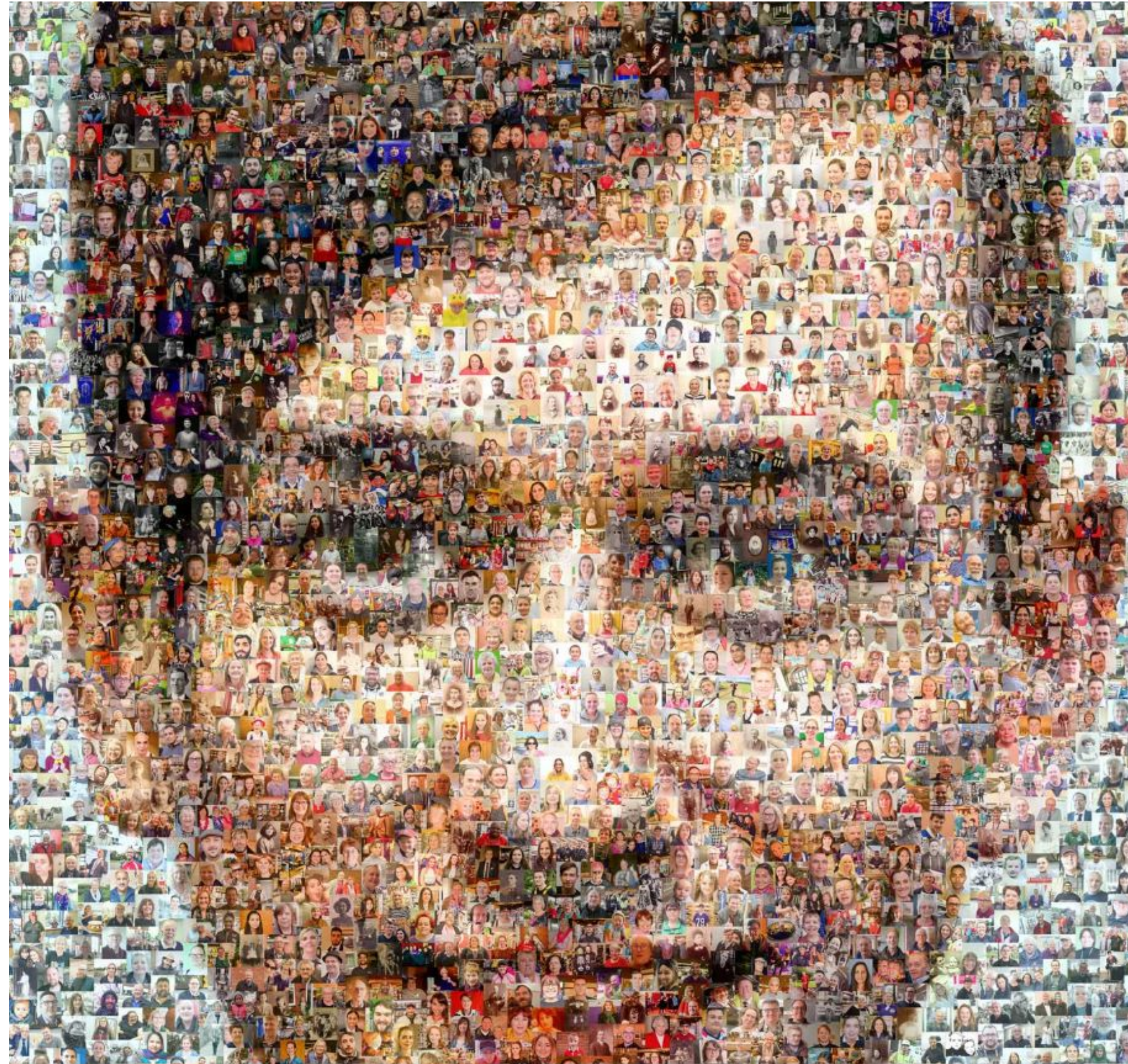
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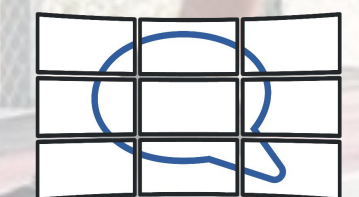
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# WHY DO WE NEED IT





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Marital Status:

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Location:



Quote:

Occupation:

## CHALLENGES & PAIN POINTS

Challenges:

Pain points:

# HOW DO WE CREATE IT? PATIENT PERSONA WORKSHOP

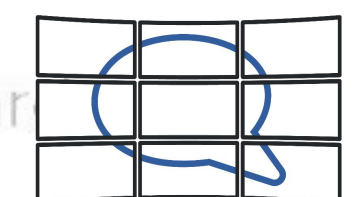
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# EXAMPLES

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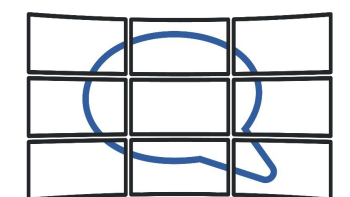
Mike the GenX  
Firefighter



Bebe the Boomer



Carl the Current  
User





## GOALS AND VALUES

Goals:

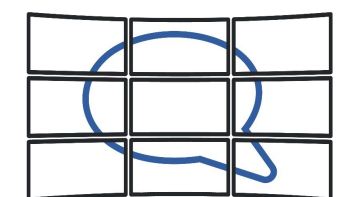
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# PATIENT PERSONAS

## GOALS & VALUES

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Values:





# PATIENT PERSONAS

## GOALS & VALUES

### PATIENT PERSONA

ENTER PATIENT NAME HERE: Mike the Firefighter

#### GOALS AND VALUES

Goals: To hear his wife, kids & granchild (mostly his grandchild), participate in conversation with his friends and ensure he & his "brothers" at the fire dept are safe.

Values: Live life to the fullest. Live in God's purpose for him. Care for his family.

Age: 44

Gender: Male

Marital Status: Married

#/Age of Children: (3) 29, 24 & 21

#/Age of Grandchildren: (1) 2 yrs

Location: Rural - Driftwood, TX



#### CHALLENGES & PAIN POINTS

Challenges: Fear of aging. Anger at having to deal with this as it throws a wrench in his structures routine. Too busy for appointments

Pain points: Denial. Fear. Pain in admitting he is aging. Stubborn. Making appt and having to take time out of his day

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Blogs/Websites: Local News. Hunting blogs

Memberships/Groups: Church, Rotary, FF Unioi

Quote: Don't tread on me

Occupation: Firefighter

Job Title: Lieutenant

Annual Income: 150,000

Level of Education: HS & Some college

Vocabulary/Key Words:

Simple, Cool, I gotta go, what's up?

#### OBJECTIONS & ROLE IN PURCHASE PROCESS

Objections to Moving Forward:

"It's no that bad!" Think his family speaks too quietly. He can hear the guys just fine (they all yell) He doesn't have time for this. These hearing aids never work right.

Role in the Purchase Process:

Wife, daughter & granddaughter have major impact. He is a softie with them. His best friend who is also a ff and wears a hrg aid.

Mike the GenX  
Firefighter



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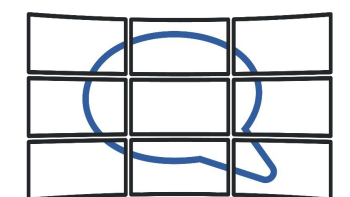
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# PATIENT PERSONAS DEMOGRAPHIC INFO

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Gender:

Marital Status:

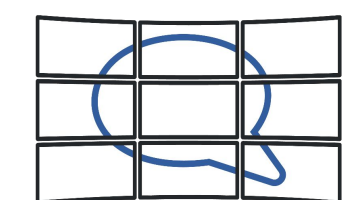
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Location:

Chall

Pain





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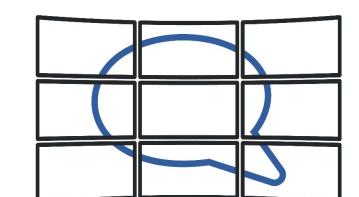
Challenges:

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# PATIENT PERSONAS CHALLENGE & PAIN POINTS

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Pain points:





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## CHALLENGES & PAIN POINTS

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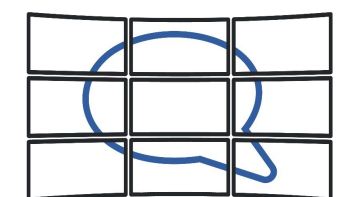
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# EXAMPLES

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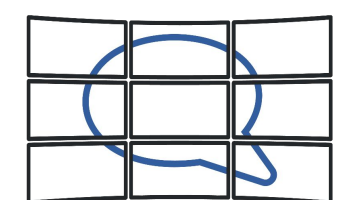
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# EXAMPLES

## PATIENT PERSONA

ENTER PATIENT NAME HERE: Bebe the Boomer

### GOALS AND VALUES

Goals: To hear her grandkids, friends & children better. To understand her doctor and pastor @church. Wants to enjoy her activities & live her best life.

Values: Conservative, Christian. Family. Respect. Contribution. Positive attitudes.

Age: 74

Gender: Female

Marital Status: Married

#/Age of Children: (3) 63, 61, 57

#/Age of Grandchildren: (7) 17-35

Location: Ind Living Community



Quote: Que Sera, Sera

Occupation: Retired Housewife

Job Title: Fun lover

Annual Income: MCR, Savings & inve

Level of Education: HS, some college

Vocabulary/Key Words:

Style. Positive Impact. Care

### CHALLENGES & PAIN POINTS

Challenges: Dealing with Galucoma & arthritis. Some memory problems. Hubby has to coordinate appts. Has some APD. Very busy & active anyway

Pain points: High expectations for people. Struggles with hearing her husband & the TV. Her friends have not done well with their hrg aids.

### SOURCES OF INFORMATION

Books: Biographies Novels, Home & Garden

Magazines: Texas Monthly, WSJ, Ladies Home

News & Current Events: Fox, Local, newspapaer

Blogs/Websites: Not comfy with computer

Memberships/Groups: Church volunteers, HOA

### OBJECTIONS & ROLE IN PURCHASE PROCESS

Objections to Moving Forward:

Expense(although she can afford it) Friends who had bad experiences. Her own negative experiences with devices

Role in the Purchase Process:

Husband & daughter are major influencers. Her doctor and her friends.



# EXAMPLES

## PATIENT PERSONA

ENTER PATIENT NAME HERE: Carl- Current User- Unhappy

### GOALS AND VALUES

Goals: To be able to communicate with his family and confidently participate in social gatherings

Values: Family, navigating life after the death of his wife, work ethic, love for country

Age: Silent Gen- 87

Gender: Male

Marital Status: Married- Widowed

#/Age of Children: (3) 67, 65 & one pas

#/Age of Grandchildren: (7) 19-35

Location: Suburbs- lives alone



Quote: It's better to cry than be angry

Occupation: Retired

Job Title: Retired

Annual Income: MCR/Living on benef

Level of Education: HS

Vocabulary/Key Words:

My dear. Common sense. Loyalty

### CHALLENGES & PAIN POINTS

Challenges: Doesn't want another episode of what happened last time. Bad HCP exp. Doesn't believe hrg aids will really help. Needs something simple

Pain points: He has "hearing aid hurt". Doesn't want to relay on family to help.

### SOURCES OF INFORMATION

Books: History, Westerns, Non-fiction, Biograph

Magazines: Time

News & Current Events: Local News, Family TV

Blogs/Websites: A little FB, uses email, Vet blo.

Memberships/Groups: local senior center

### OBJECTIONS & ROLE IN PURCHASE PROCESS

Objections to Moving Forward:

Afraid it will be too complicated. Still getting over "Hrg Aid Hurt" as a result of a bad prev exp. Doesn't want to be a burden/

Role in the Purchase Process:

His kids & grandkids. Doctor



# PATIENT PERSONA

ENTER PATIENT NAME HERE: \_\_\_\_\_

## GOALS AND VALUES

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Age:

Gender:

Marital Status:

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Location:



Quote:

Occupation:

## CHALLENGES & PAIN POINTS

Challenges:

Pain points:

# PATIENT PERSONA Q&A

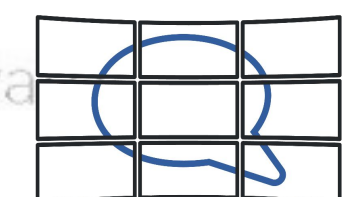
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Magazines:

## OBJECTIONS & ROLE IN PURCHASE PROCESS

Objections to Moving Forward



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# PATIENT PERSONA

## SUMMARY: PATIENT PERSONAS

ENTER PATIENT NAME HERE: \_\_\_\_\_

### GOALS AND VALUES

Goals:

Values:

- Create multiple personas
- Ensures you take the most effective approach in marketing
- Provides powerful insights about your core patients
- Key tool in developing the Patient Journey

Age:

Gender:

Marital Status:

#/Age of Children:

#/Age of Grandchildren:

Location:

Quote:

Occupation:

### CHALLENGES & PAIN POINTS

Challenges:

Pain points:

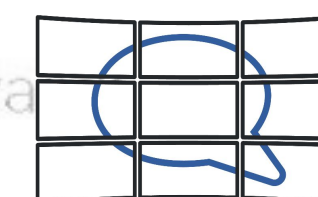
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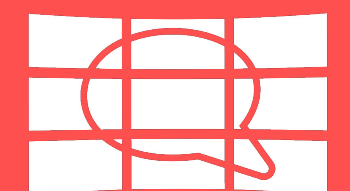
Objections to Moving Forward



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# 2 CLINIC PERSONA





# CLINIC PERSONA

NAME:

Personality:

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Motivations/Emotions:

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Age:

Work:

Family:

Location:

Character:

# WHAT IS A CLINIC PERSONA

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Frustrations:

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Brands We Align With:

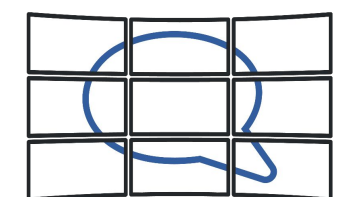
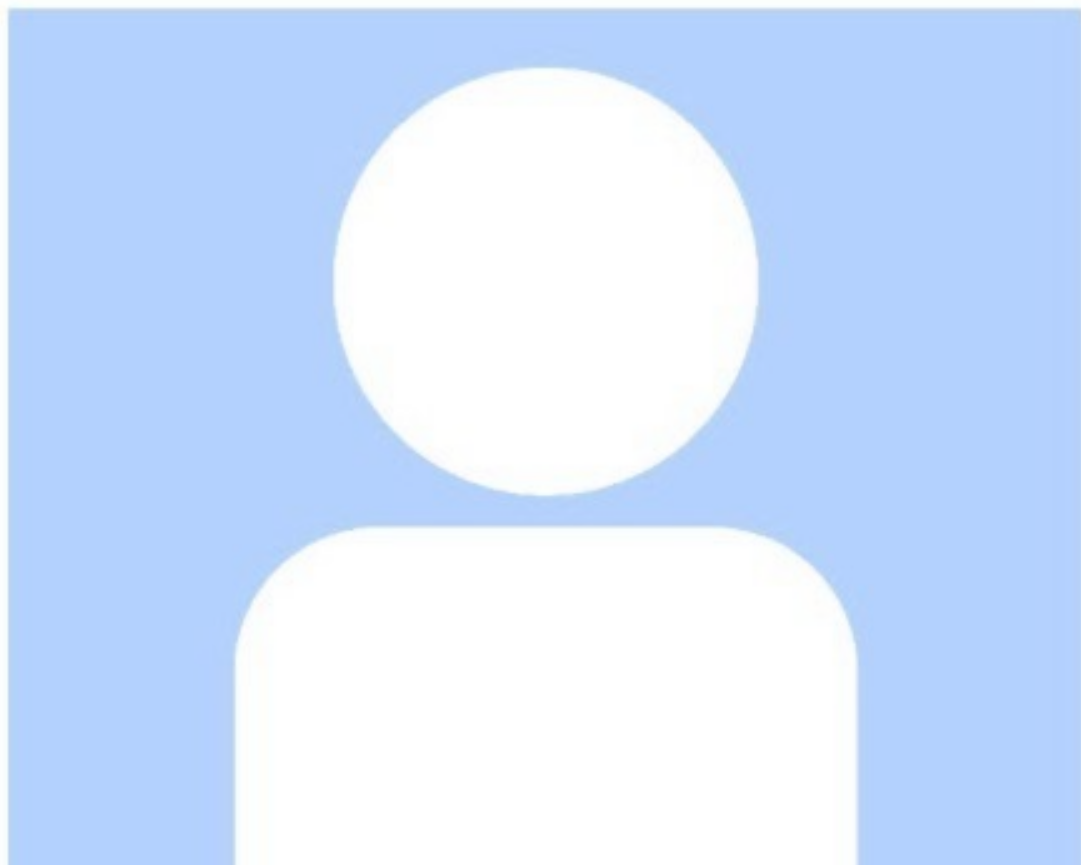
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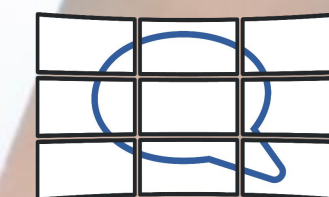
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A close-up photograph of a woman with blonde hair, wearing a white lab coat over a blue top. She is smiling slightly and looking towards the camera. Her hands are clasped together, holding a black pen over a white document. The background is softly blurred, showing what appears to be an office or laboratory setting with a window.

# WHY DO WE NEED IT





# CLINIC PERSONA

NAME:

Personality:

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Motivations/Emotions:

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Age:

Work:

Family:

Location:

Character:

# HOW DO WE CREATE IT? CLINIC PERSONA WORKSHOP

Frustrations:

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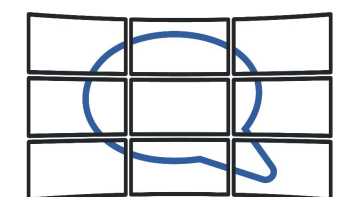
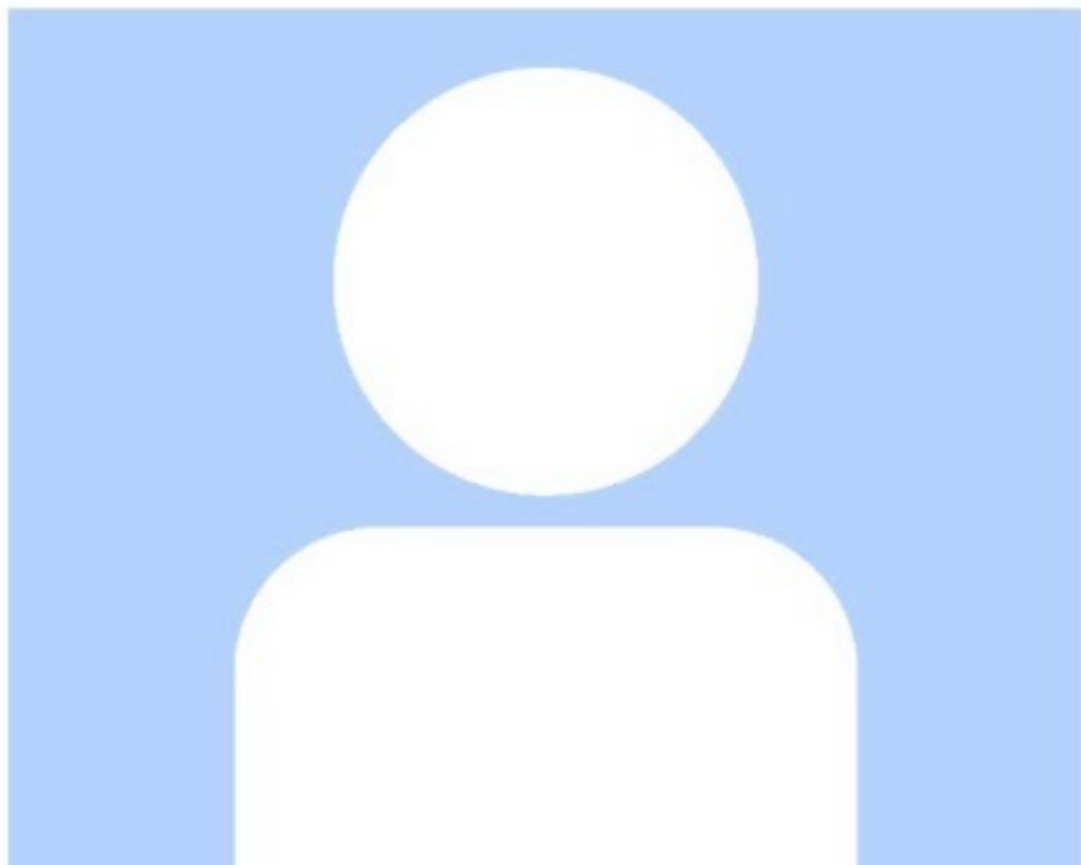
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# CLINIC PERSONA

NAME:

Personality:

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Motivations/Emotions:

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# CLINIC PERSONAS NAME & PERSONALITY

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Age:

Work:

Family:

Location:

Character:

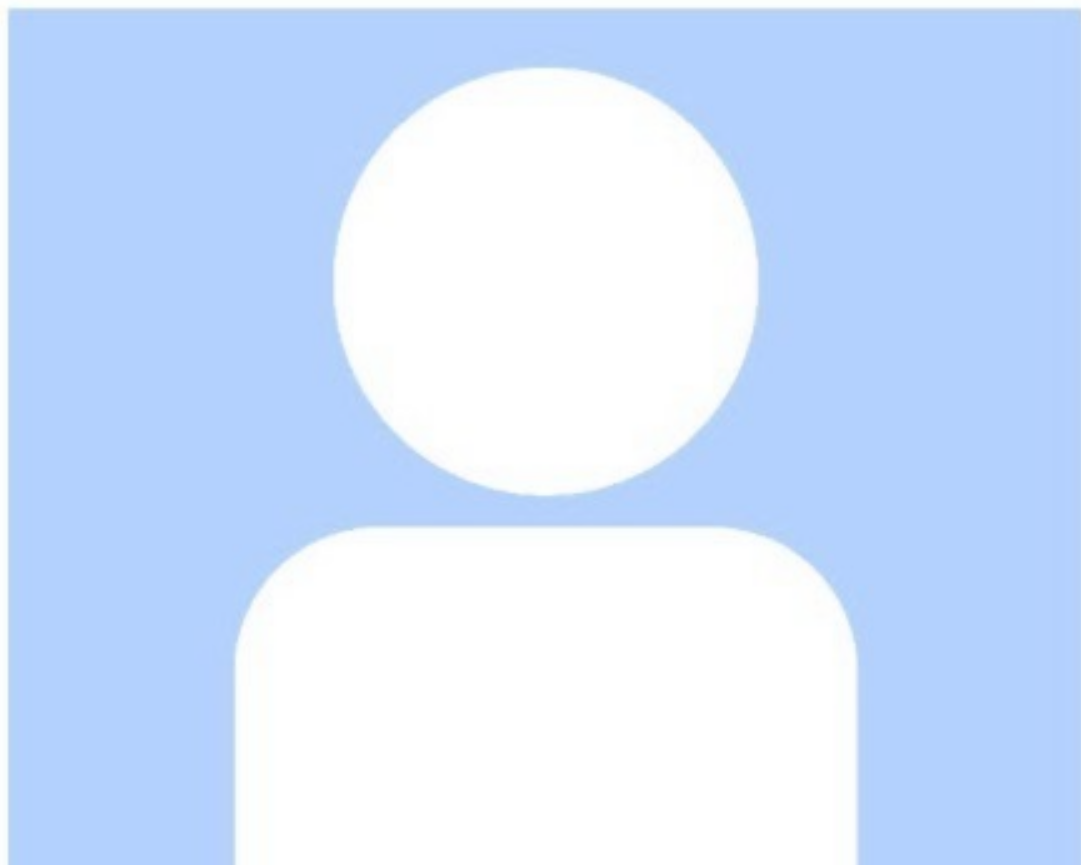
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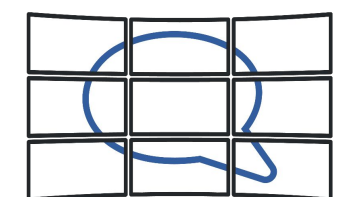
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Brands We Align With:





# CLINIC PERSONA

NAME:

Personality:

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Motivations/Emotions:

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# CLINIC PERSONAS

## MOTIVATIONS & EMOTIONS

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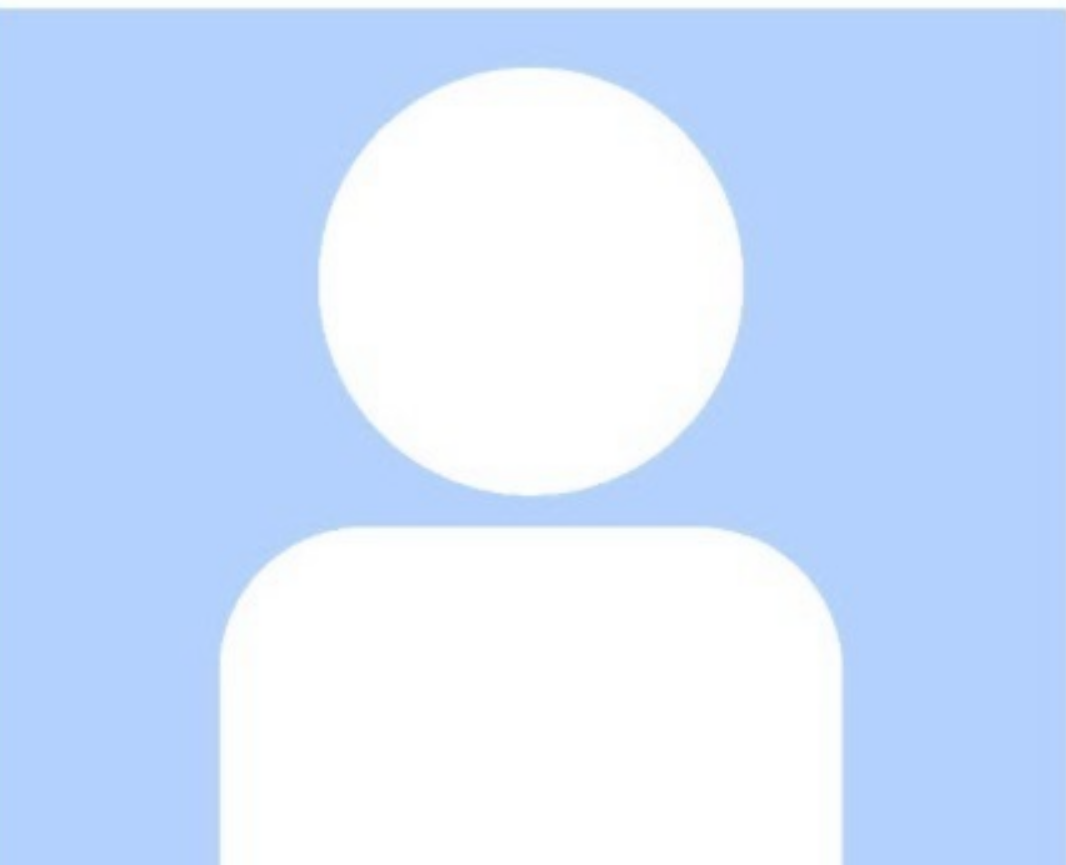
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Frustrations:

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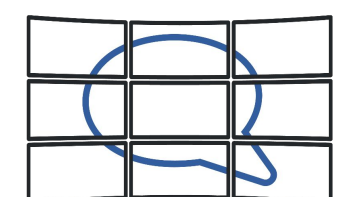
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Brands We Align With:





# CLINIC PERSONA

NAME:

Personality:

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Motivations/Emotions:

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# CLINIC PERSONAS DEMOGRAPHICS

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Age:

Work:

Family:

Location:

Character:

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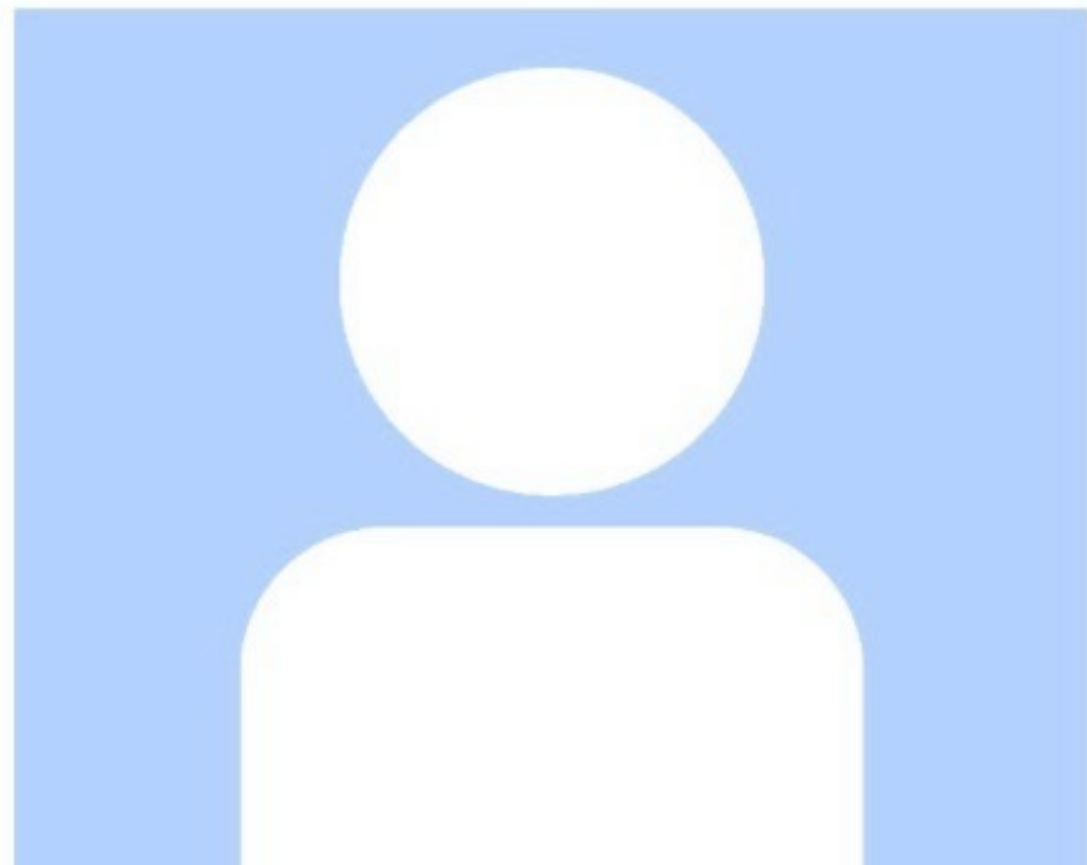
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Frustrations:

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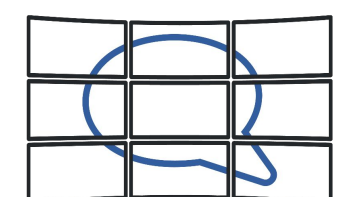
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Brands We Align With:





Personality:

Four horizontal lines for writing.

Motivations/Emotions:

Four horizontal lines for writing.

Age: \_\_\_\_\_

Goals: \_\_\_\_\_

Values: \_\_\_\_\_

Work: \_\_\_\_\_

Family: \_\_\_\_\_

Location: \_\_\_\_\_

Character: \_\_\_\_\_

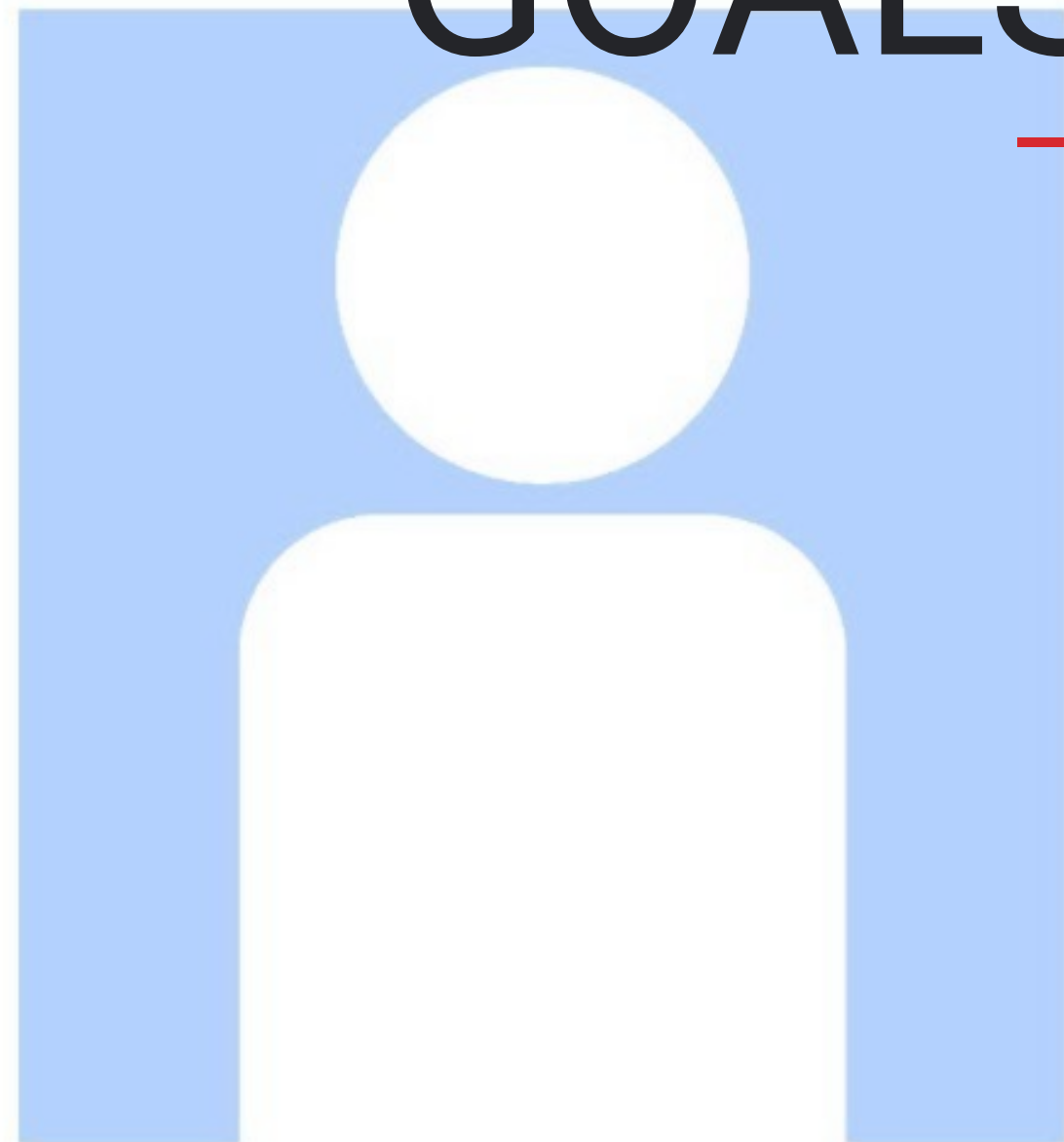
# CLINIC PERSONAS

## GOALS, VALUES & FRUSTRATIONS

Frustrations:

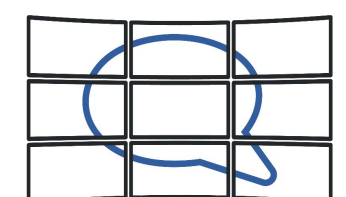
Five horizontal lines for writing.

Brands We Align With:



Bio:

Three horizontal lines for writing.





Age: \_\_\_\_\_  
Work: \_\_\_\_\_  
Family: \_\_\_\_\_  
Location: \_\_\_\_\_  
Character: \_\_\_\_\_

Goals: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Values: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# CLINIC PERSONAS

## QUOTES/MOTTO, BIO & BRANDS

Functions:

Brands We Align With:

Quote/Motto: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Bio: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# Clinic Persona Example

## CLINIC PERSONA

NAME: Ruth

### Personality:

Warm, sweet, calming, thoughtful. The friend you turn to.  
Servant heart. Involved. Welcoming & positive. Inspiring.

### Motivations/Emotions:

God, Family, Service, Hospitality, Impact, Truth

Joy, Love, Compassion, Empathy

Age: 55

Work: Trainer

Family: Married w/kids & 2 grandkids

Location: Texas

Character: Woman of wisdom

### Goals:

To care for people in a Christ-like way

### Values:

Respect, Integrity, Love, Duty, Honor

Selfless Service



### Frustrations:

Ignorance, Hypocrisy, Dishonesty

### Brands We Align With:



### Quote/Motto:

Treated people the way you want to be treated.

Love covers a multitude of sins

### Bio:

Attended community college for 2 years  
Transferred to larger state univ where  
rcvd BS.



# CLINIC PERSONA

NAME:

Personality:

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Motivations/Emotions:

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# CLINIC PERSONA

## Q&A

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Age:

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Goals:

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Values:

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Work:

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Family:

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Location:

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Character:

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Frustrations:

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Brands We Align With:

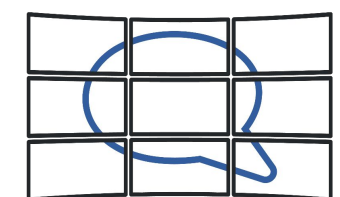
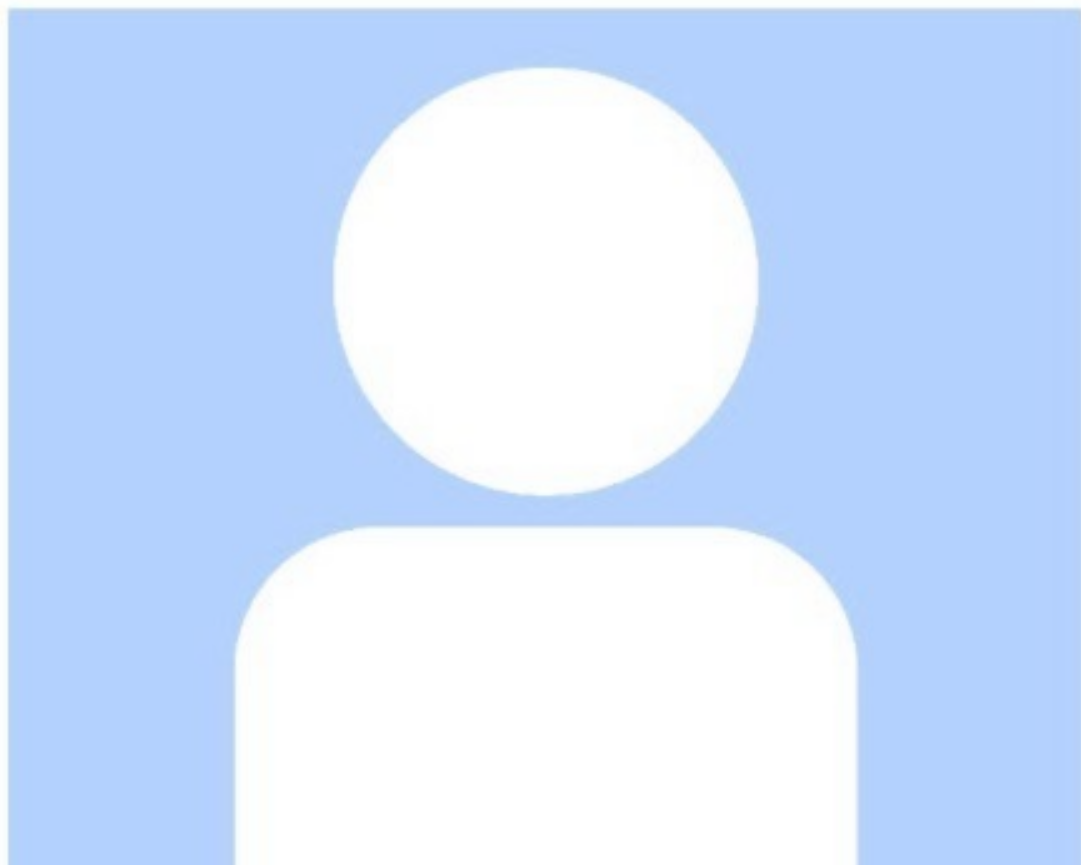
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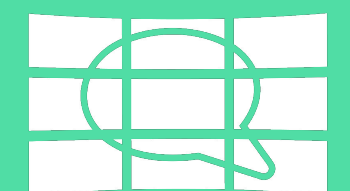
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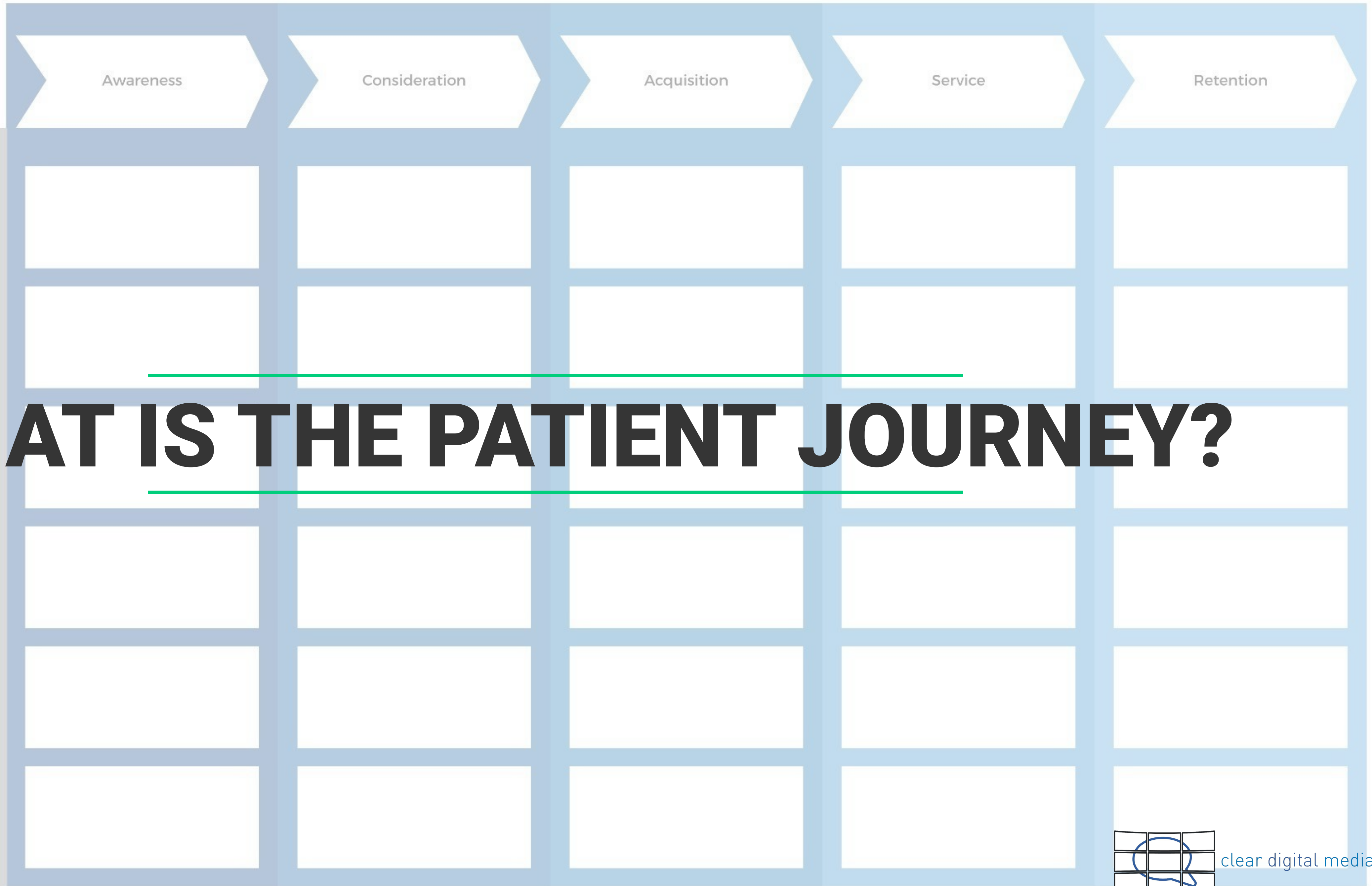


# PATIENT JOURNEY



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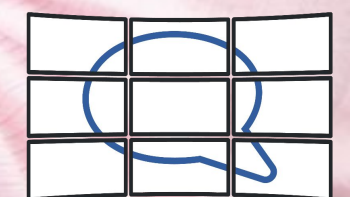


# WHAT IS THE PATIENT JOURNEY?

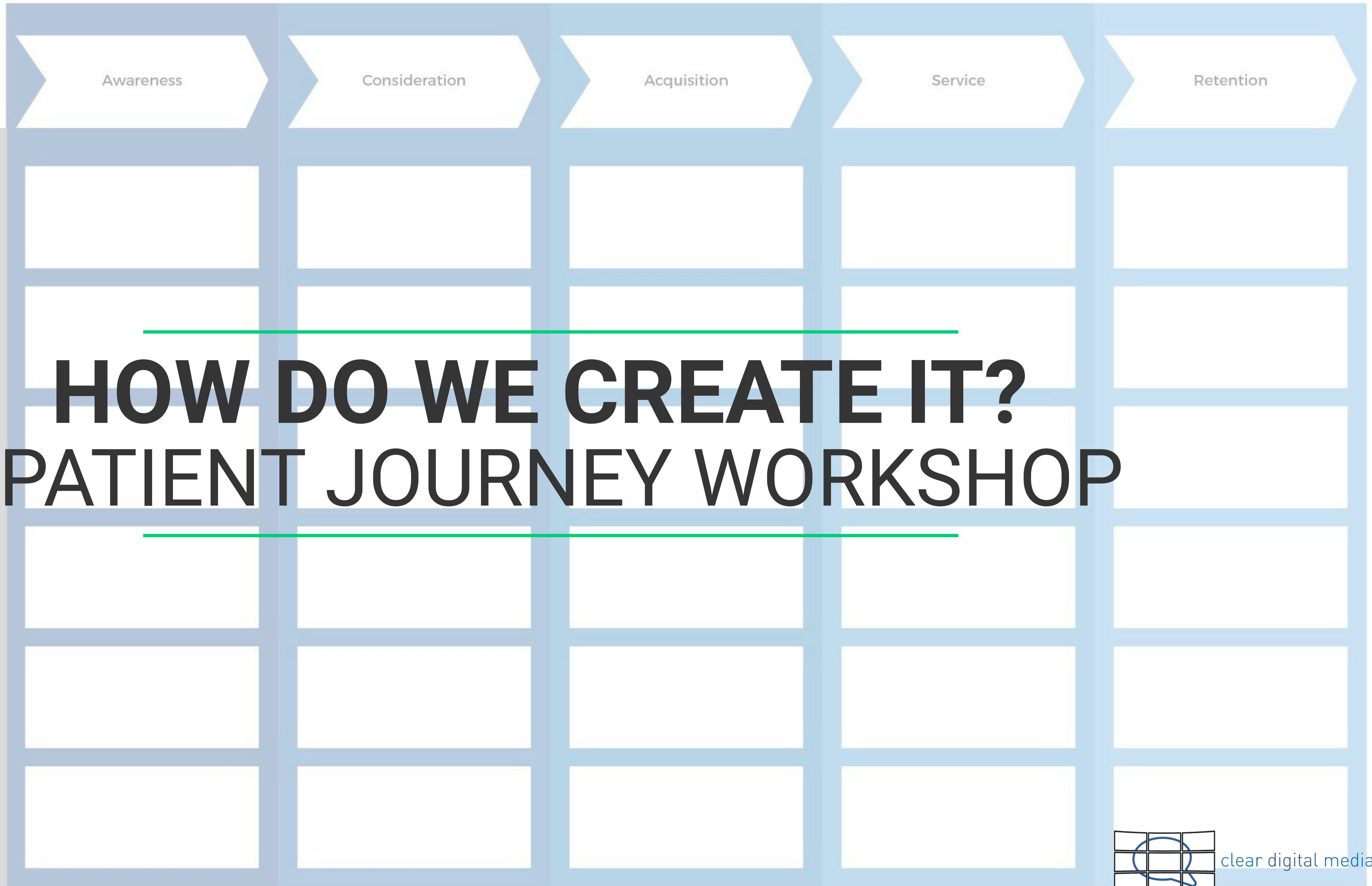




# WHY DO WE NEED IT?







**HOW DO WE CREATE IT?**  
**PATIENT JOURNEY WORKSHOP**



# PATIENT JOURNEY WORKSHOP



## UNDERSTANDING THE STAGES

## UNDERSTANDING THE PATIENT FOCUS

Patient Goals

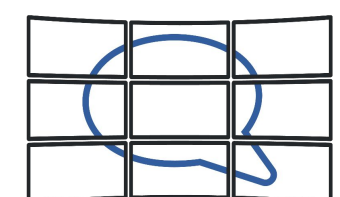
Patient Actions

Touchpoints & Channels

Patient Thoughts/  
Emotions

Pain Points

Opportunities to Improve





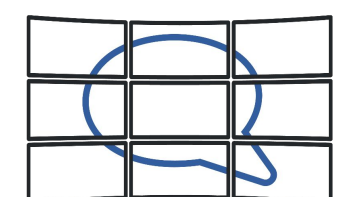
# PATIENT JOURNEY: AWARENESS

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## HOW ARE MY PATIENTS FINDING ME?

- Online search and reviews
- Social media
- Existing patient referrals
- Traditional Marketing
- Lunch & Learns





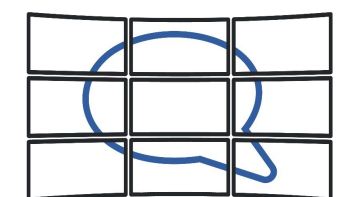
# PATIENT JOURNEY: CONSIDERATION

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## WHO ARE THEY COMPARING ME TO?

- Comparing options
- Brand awareness
- Online Reviews
- Existing patient referrals
- Perceptions of quality





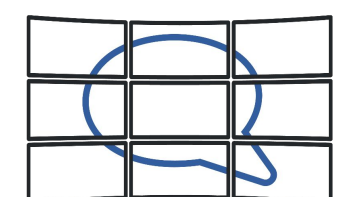
# PATIENT JOURNEY: ACQUISITION

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## WHY WOULD THEY CHOOSE ME?

- Conversion
- Front desk/phone skills
- Onboarding
- Include family or support person
- Online appointments





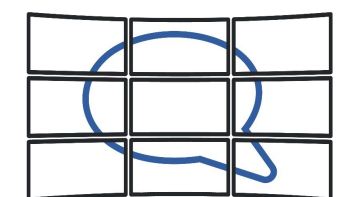
# PATIENT JOURNEY: SERVICE

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## HOW DO YOU MAKE YOUR PATIENTS FEEL?

- Testing & diagnostics
- Treatment plan & fitting
- Your time to shine
- Locking in the relationship



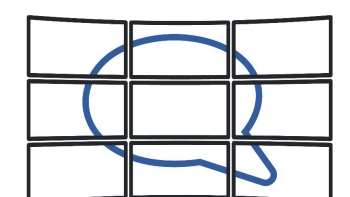
# PATIENT JOURNEY: RETENTION

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WHY WOULD THEY COME BACK TO MY CLINIC?

- Follow up & communication
- Secret sauce of success





# PATIENT JOURNEY: PATIENT GOALS

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Patient Goals

Patient Actions

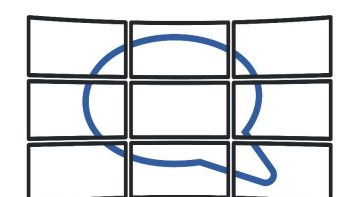
Touchpoints & Channels

Patient Thoughts/  
Emotions

Pain Points

Opportunities to Improve

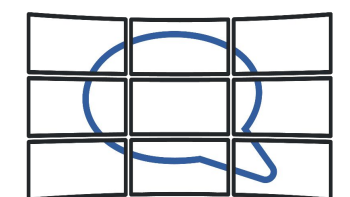
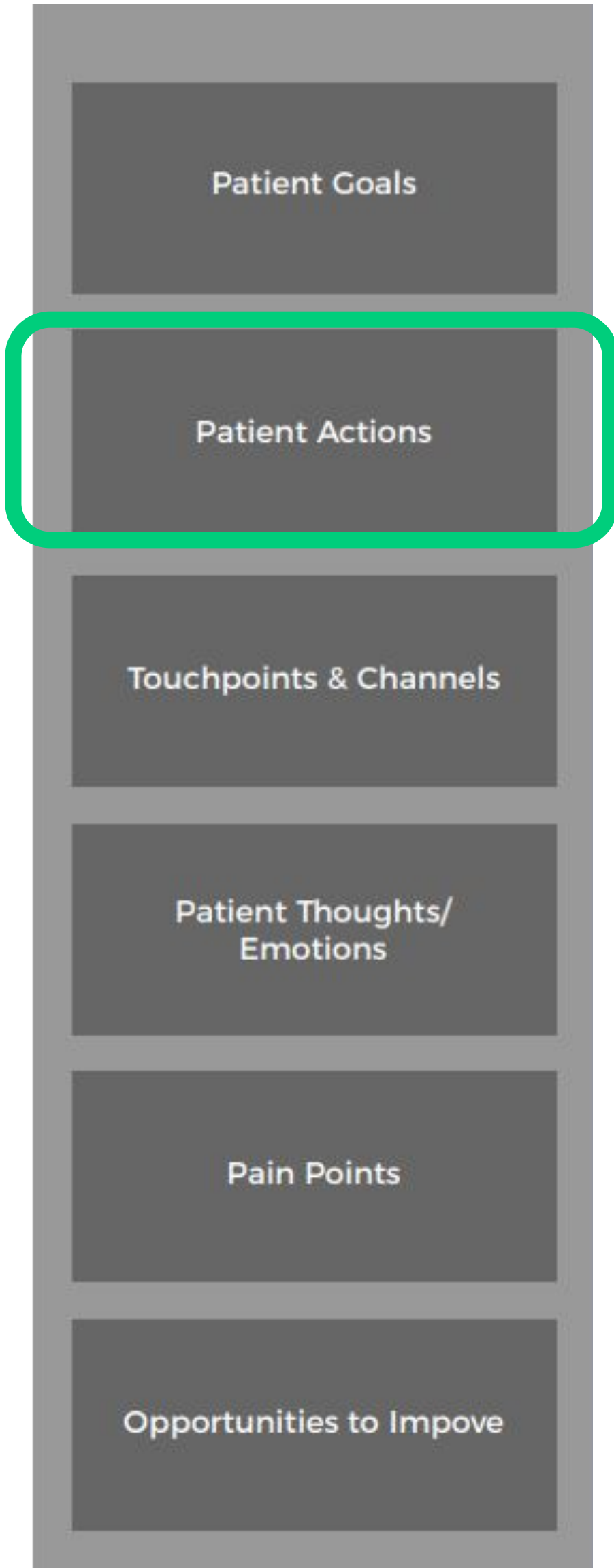
Define the specific goals of the patient based on the stage of the journey they are in.



# PATIENT JOURNEY: PATIENT ACTIONS

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Define the actions will the patient will most likely take in the stage of the journey they are in.





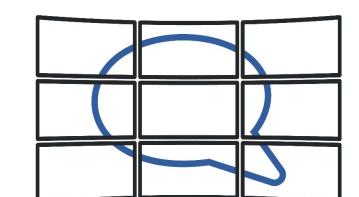
# PATIENT JOURNEY: TOUCHPOINTS & CHANNELS

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Touchpoints are anytime a patient interacts with your brand.

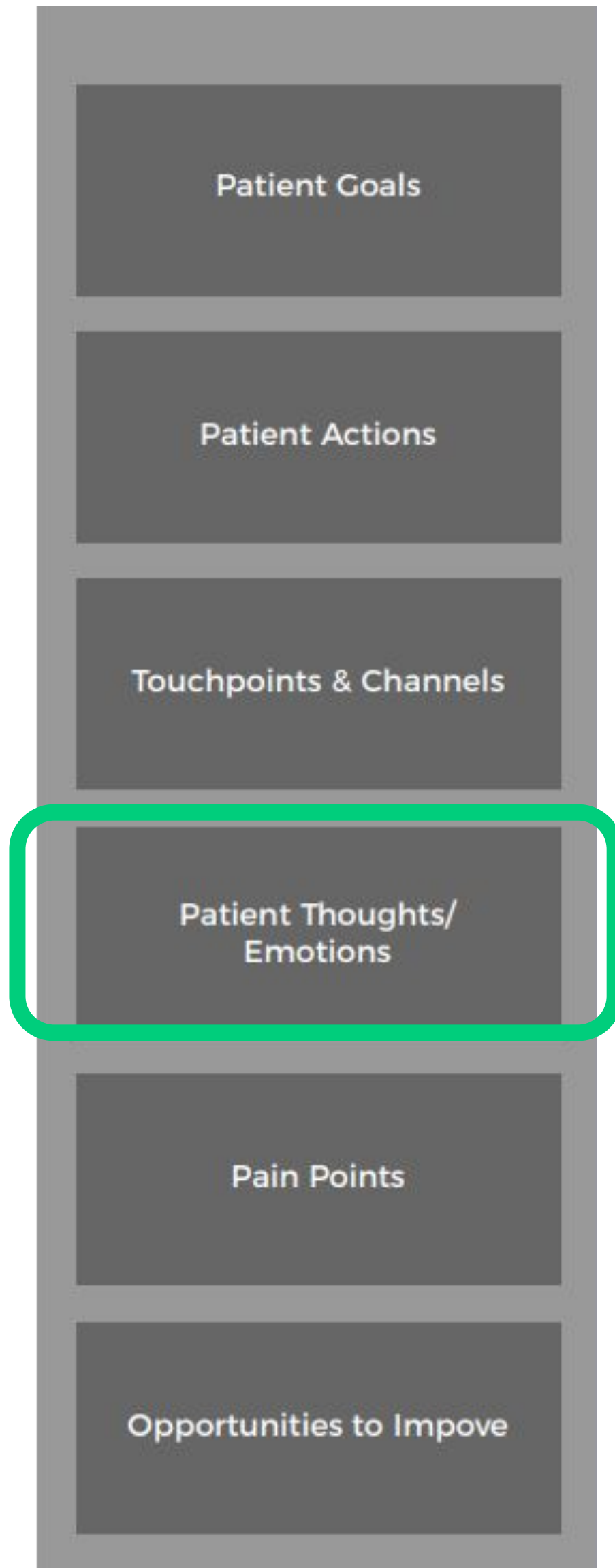
Channels are similar to touchpoints but are how the patient communicates with you.



# PATIENT JOURNEY: PATIENT THOUGHTS/EMOTIONS

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What is your patient thinking and how are they feeling at this stage of their journey?

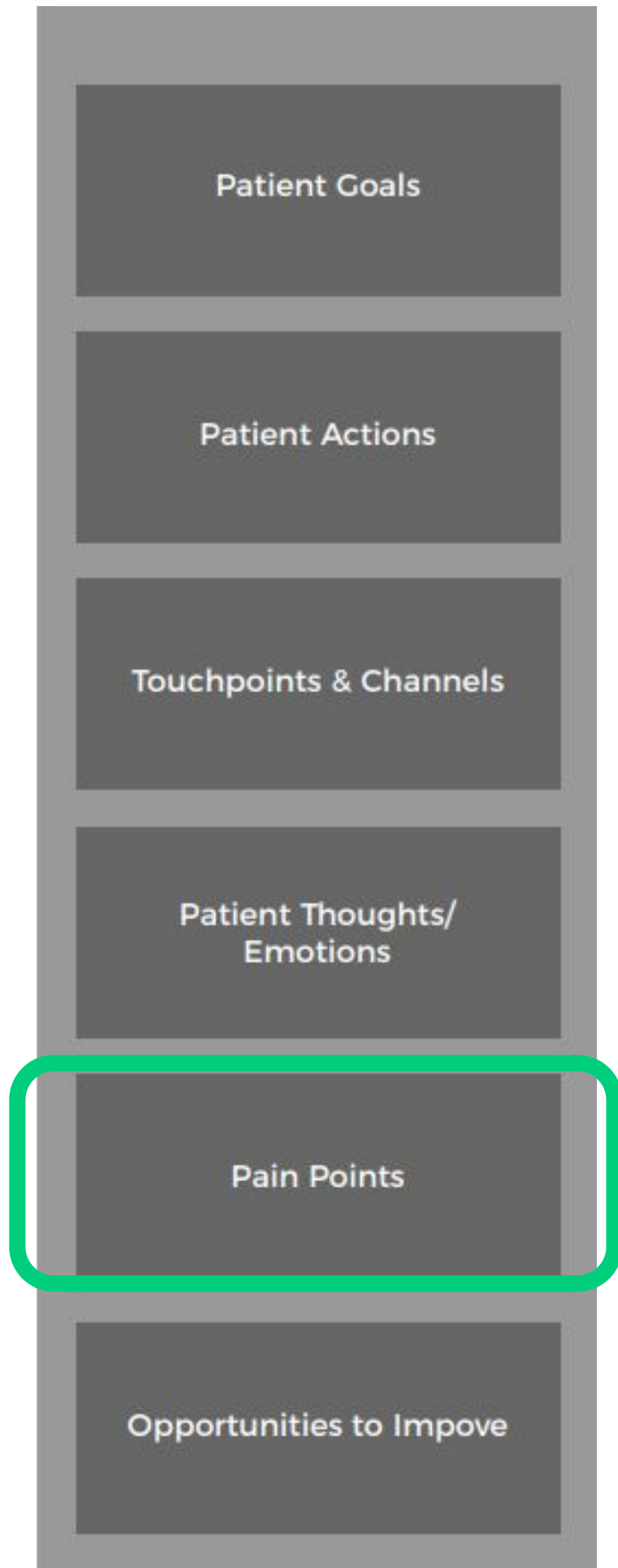




# PATIENT JOURNEY: PAIN POINTS

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Pain Points are problems that occur at the different stages of the journey.



# PATIENT JOURNEY: OPPORTUNITIES TO IMPROVE

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Processes, actions, strategies YOU can take to improve the experience for the patient at this stage of their journey.

Patient Goals

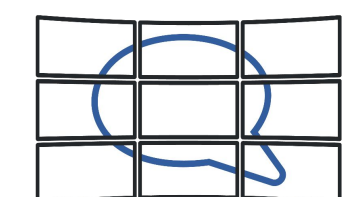
Patient Actions

Touchpoints & Channels

Patient Thoughts/  
Emotions

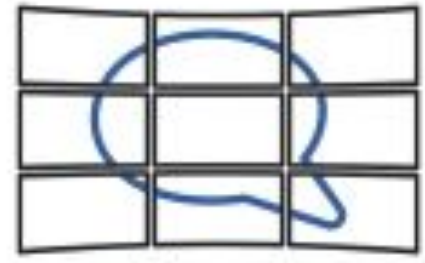
Pain Points

Opportunities to Improve





# MIKE



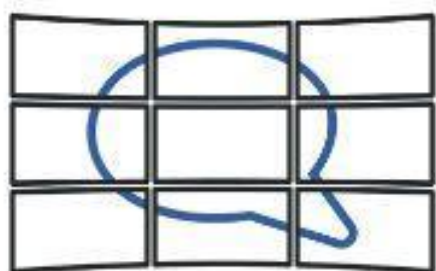
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MIKE

	Awareness	Consideration	Acquisition	Service	Retention
Patient Goals	Determine if he really have a hearing loss. Rule out other causes of his hearing issues Make wife happy Wife may be driving this and doing the research	Find a local clinic that has hours that work for me and can get me in and out	Make appt when it's convenient Wife may be the one setting the appt	To hear better without it costing a fortune and with a warranty and lets me talk on my cell without issue	Efficient follow up for cleaning Do as much online as possible
Patient Actions	Online research about hearing loss & ear wax removal Online search to see how he can get a hrg test discretely	Compares hours, services offered, and if they take his insurance. Talks to doc and a couple buddies Consults with his wife	Set appt online	Agrees to be fit with a hearing aid	Requests cleaning supplies so doesn't have to depend on the HCP
Touchpoints & Channels	Website Email Online Chat	Doctor Patient reviews online Email/webchat	Website, Email, Text Apt reminder	Phone, email, text Front desk, PCC, provider	Email, Website, Text PCC - appt follow ups
Patient Thoughts/ Emotions	I know I have some hearing loss but I am not ready to accept that. I feel bad my wife is so frustrated with me but this is a hard pill to swallow Annoyed I have to deal with this	If he or his wife can find a local clinic that they feel comfortable with- they will make the appt.	This better be easy	Doesn't want to "hang out" Only here because wife insisted	Improved confidence Sense of relief
Pain Points	Poorly designed website Lack of meaningful information on line No means to communicate without having to call	Inadequate info on insurance coverage Poor reviews Poor responsiveness on questions Physician has no referral suggestions	Complications scheduling	Appointment takes too long Conversation is not direct and efficient	Ineffective follow up Hassle setting follow up appt
Opportunities to Impove	Make the website rock! Add content that empathizes Add video content of other "working man" stories	Address negative reviews Improve online content Get in front of your local docs & build a relationship	Make sure online scheduling is available and works	Improve communication	Ensure follow ups are timely, have purpose and setting follow up appts is simple



# BEBE

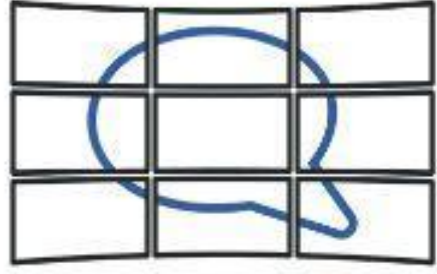


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	Awareness	Consideration	Acquisition	Service	Retention
Patient Goals	To be able to hear her grandkids. Her adult children are getting frustrated with her hearing loss.	Finding a provider that has patience with her and can communicate effectively with her	Make the process for making an appt simple, enjoyable and low key	To acquire a simple to use device that allows her to hear not only her grandkids, friends and husband but to also hear the TV Also looking to hear better on the phone.	Wants to drop in for clean & checks Wants proactive follow ups
Patient Actions	Talking to her primary care doctor looking for advice Talking to neighbors & friends or anyone she sees that is wearing a hearing aid	She will most likely email or call to learn more. She needs a friendly, patience voice. She may have a friend or husband call on her behalf and they may do research on providers online	Calls to make appointment or hubby calls for her Will ask for appt reminders Will ask a number of questions	Shows up 15-30 min early to appt Expects comfort & information in the waiting room	Will drop in probably 1x per month Will be a high touch patient
Touchpoints & Channels	Her doctor & the staff at the doctor's office Friends, neighbors - people Newspaper & TV Internet via her friends- she is not tech saavy	Channels: Email/Phone/a little internet Touchpoints: PCC/email	Channels: Phone/email Touchpoints: Front office- PCC Text appt reminders	Esthetics of the physical clinic Waiting room Front desk/PCC HCP	In person Phone Email Mail
Patient Thoughts/ Emotions	It may be time to address this. She is feeling a little lost and more confused lately Her kids are getting frustrated and concerned and this is making her sad Fear	As she gathers info, if treated well, she is building confidence and feeling more empowered	She expects to be treated in the same way she would treat others- with a smile, with kindness & patience.	Excited but a little nervous and hesitant	Looks forward to building a long-term relationship. Trust is key Feeling confident
Pain Points	Lack of comfort with tech keeps her off the internet so she will miss many of the messages online Fear of learning	Difficult communication Phone skills or call management Slow email response times or poor communication	Complicated or disorganized appt scheduling systems Lack of follow up with appt reminders	Poor in-clinic experience Uncomfortable waiting area Needs for phone amplification not fulfilled	inconsistent follow ups Clinic closed when she drops in
Opportunities to Improve	Not abandoning traditional communication tools. Meeting her where she is at (i.e. working with Ind Living Centers)	Phone skills training for staff Automated email responses that are personal Informational tools for caregivers that assist in the research friends/family does	Simplify appt scheduling. Ensure front office is trained well	Improve front office staff training Do a waiting room assesment Offer caption phones, educate about about accessories on screen in waiting room	Automate with personalizations Consistent office hours



# CARL

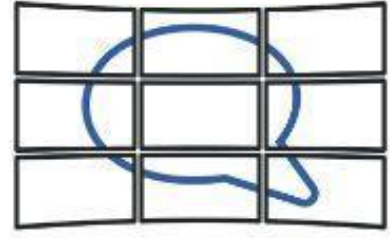


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	Awareness	Consideration	Acquisition	Service	Retention
Patient Goals	How can I better hear my family to stop them from complaining without having the same bad experience I did last time.	Needs to hear better Needs to have trust in provider	Make an appointment that is convenient and doesn't require my family to have to change their schedule to assist  To have previous records available to new HCP	HELP ME HEAR!	Confidence in the future Knowing I can hear my family without being a major burden on them for the rest of my life.
Patient Actions	Asks friends for advice. Talks to doctor May do a little internet research His kids will most likely do online research	Reviews patient testimonials May call the clinic to ask questions Looks at on line reviews of the provider	Book appointment & ask if records from previous provider can be requested by the clinic	Comes 20 minutes early to appt due to anxiety	Calls for cleaning regularly May call with many questions May reach out because he feels a little lonely
Touchpoints & Channels	Channels: Internet/TV/Newspaper/Friends Touchpoints: Phone/Email	Channels: Online review sites, website, phone Touchpoints: Website/Email/Phone	Channels: Phone Touchpoint: Online appt booking OR PCC/Call Center	Front office staff Waiting area	Email/chat/phone
Patient Thoughts/Emotions	No! I do not want to have to go through this again. I'm struggling already.  Why was it so difficult?	Anxiety about building a new relationship Fear of being a burden to others Can I afford this?	I sure hope I am making a good decision to make another appoint and try this again.  Anxious Can I afford this?	First impressions will be based on the waiting room experience and the attitude of the PCC	Grateful Building trust Appreciation
Pain Points	Carrying baggage of a bad experience Being a burden to others	If the PCC is unfriendly when he contacts the clinic If the website is slow or hard to navigate Pricing info transparency	If calls are not answered quickly and efficiently If PCC is unfriendly If online appointment scheduling is not available or accurate If online appointment scheduling is inaccurate	If the PCC is unfriendly If the HCP is not focused on the patient If the waiting area is unpleasant If there is nothing that is helping to precondition the patient and calm his nerves	If follow up appointments are not a priority for the clinic If he can not come in for clean & checks to fit his ability to get to the clinic
Opportunities to Improve	Easy to understand information Patient testimonials that are at the forefront of the web site Seamless process to contact clinic	Easy to access and see testimonials on website Easy to access to links on website	Ensure PCC is well trained Utilization of call monitoring Ensure website appointment scheduling is available Improve responsiveness	Staff training- always friendly- greet with a smile HCP organization and ensuring adequate time is scheduled for the appt based on his history HCP reviewing notes & concern patient has PRIOR to the appt. Having helpful, education content in the waiting room that helps the patient feel at ease	Make sure to set good expectations on times/dates for clean & checks and help him plan in advance  Ensure he feels appreciated as a patient



# PATIENT JOURNEY - YOUR TURN

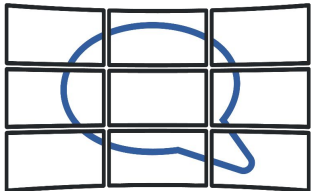


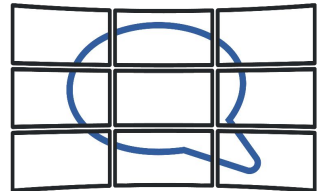
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	Awareness	Consideration	Acquisition	Service	Retention
Patient Goals					
Patient Actions					
Touchpoints & Channels					
Patient Thoughts/ Emotions					
Pain Points					
Opportunities to Improve					



# REVIEW



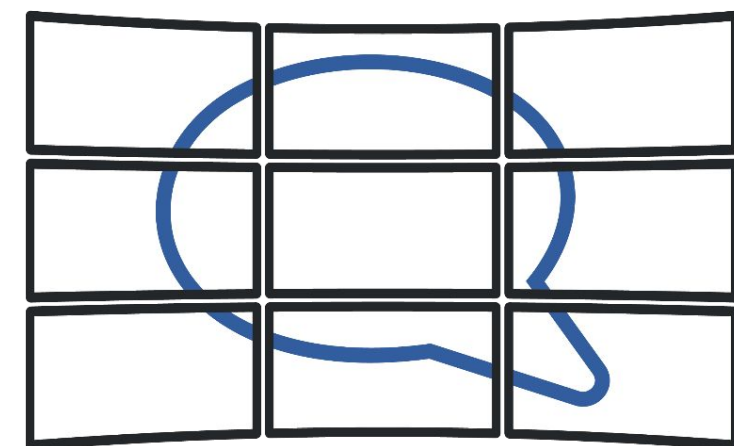




# Thank you!

All of our worksheets are available for download here:

<https://cleardigitalmedia.net/thaa-patient-journey/>



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