ClinicOS

The Patient Journey Audit

Seven stages and 35 touchpoints. Find where patients slip away, and fix it this week.

1	2	3	4	5	6	7
FIND	CONTACT	BOOK	ARRIVE	TREAT	PAY	LEAVE

A free guide for clinic owners, from Rob and Laura at ClinicOS

START HERE

Every patient’s experience of your clinic is built from dozens of small moments.

The phone greeting. The confirmation email. The first minute in the treatment room. The goodbye at the desk. Each one either builds trust or quietly leaks it.

Most clinics have never mapped these moments. The good news is that the changes that make the biggest difference are usually the cheapest: a better script, a clearer template or a small new habit. We call these quick wins.

This guide walks you through 35 touchpoints across seven stages of the patient journey. For each one you get a question to **check** and a **quick win** to borrow.

> If it costs money, it’s a project.
> If it costs a decision, it’s a quick win.

Walk it

Use the three-step audit on the next page. An afternoon is enough.

Score it

Mark each touchpoint on the scorecard near the end of this guide.

Pick three

Choose three changes for this week. Not 35. Three.

> **No new software needed.** Every quick win here works with what you already have. Where a tool would make life easier, we have flagged it as optional.

THE AUDIT

Walk your own journey

Set aside an afternoon. Better still, do it with your reception team, who see more of the journey than anyone.

1 Walk it as a new patient

Search for your clinic, ring it, book online, read your own confirmation email. Go through all seven stages with fresh eyes.

2 Score every touchpoint

Use the questions on each page, then mark each one on the scorecard. Be honest: “fine” usually means forgettable.

3 Fix the cheap wins first

Ignore anything that needs a budget for now. Circle what you could change this week with a script, a template or a habit.

Delight
Patients would mention it to a friend.

Neutral
Fine, but forgettable.

Friction
Confusing, slow or cold.

THE SEVEN STAGES

1	**Find**	How you show up when someone searches for help.	5 TOUCHPOINTS
2	**Contact**	The first call, message or email, and how quickly it is answered.	6 TOUCHPOINTS
3	**Book**	How easy it is to get a time, and what they hear next.	6 TOUCHPOINTS
4	**Arrive**	First impressions, the welcome and the wait.	5 TOUCHPOINTS
5	**Treat**	The first minutes in the room and how the plan is explained.	5 TOUCHPOINTS
6	**Pay**	Payment and rebooking without the awkward moment.	3 TOUCHPOINTS
7	**Leave**	The goodbye, the follow-up and the reason to come back.	5 TOUCHPOINTS

STAGE 1 OF 7

Find

How you show up when someone searches for help.

1

1 Google Business Profile

CHECK

Are the hours, services and photos current? Are common questions answered?

QUICK WIN

Add real photos of the team, the rooms and your front door. Answer the five questions people ask most.

2 Google reviews

CHECK

Does every review have a reply? How do your replies to criticism read?

QUICK WIN

Reply to every review within a week. Be warm with praise and calm with criticism, and never confirm that someone was a patient.

3 Website condition pages

CHECK

Would a patient understand every word? Do they know roughly what they are signing up for?

QUICK WIN

Strip out the jargon and set a realistic expectation, such as “most patients see us around five times.” Base the figure on your own data.

4 Social media profiles

CHECK

When was the last post? Is there a booking link in the bio?

QUICK WIN

Pin one “who we are” post, and put your booking link and location in the bio.

5 Referrals

CHECK

Does anyone know who sent this patient to you?

QUICK WIN

Reception asks and notes it, so the first interaction can use it: “Lovely to meet you. Glad Sheila sent you our way.”

STAGE 2 OF 7

Contact

The first call, message or email, and how quickly it is answered.

2

6 The phone call

CHECK

Ring your own clinic. What does it actually sound like?

QUICK WIN

Use a warm, named greeting: “Good morning, [Clinic], this is Sarah. How can I help?”

7 Missed calls

CHECK

What happens when nobody picks up?

QUICK WIN

Return calls as soon as possible. AI call answering beats voicemail, and voicemail beats nothing.

OPTIONAL An AI call-answering service

8 Email replies

CHECK

Pull up the last five emails the clinic sent. How do they read?

QUICK WIN

Agree one warm, shared sign-off that ends with “Any questions, just reply to this email.”

9 Contact forms

CHECK

Test every form on your website. Does each one actually arrive?

QUICK WIN

Set a same-day reply standard and an auto-reply that says when people will hear back.

10 Social media messages

CHECK

Are messages sitting unanswered?

QUICK WIN

If social media is not your strength, set an auto-reply asking people to email or call. Nobody likes being left hanging.

11 Out of hours

CHECK

If someone calls after closing, do they have another option?

QUICK WIN

Record a message with tomorrow’s opening time, and point callers to online booking.

STAGE 3 OF 7

Book

How easy it is to get a time, and what they hear next.

3

12 Online booking

CHECK

How many clicks does it take? Are patients forced to pay up front?

QUICK WIN

Cut the clicks, name appointment types in patient language, and make paying up front optional.

OPTIONAL Apple Pay or Google Pay in the booking flow

13 Price clarity

CHECK

Can a patient see the price before they book?

QUICK WIN

Show it on your website and in the booking flow, then repeat it in the confirmation.

14 Booking confirmation

CHECK

Read your own confirmation email. Does the language work? Does it answer the obvious questions?

QUICK WIN

Include the key details (who, when, how long, what to wear), where to park, and who to call if anything changes.

15 Intake form

CHECK

Does every question need asking now? Is any of it asked again in the room?

QUICK WIN

Cut the duplicates, because patients hate being asked the same thing twice. Open with a warm line on why you ask and how long it takes.

16 Appointment reminder

CHECK

Is the reminder clear, and does it ask anything of the patient?

QUICK WIN

Ask patients to reply to confirm, so you get early warning if they can’t make it.

OPTIONAL Two-way SMS, if your system offers it

17 Cancellation policy

CHECK

If you charge for late cancellations, is that clear before anyone books?

QUICK WIN

State it kindly at booking, with the reason behind it, and repeat it in the confirmation.

STAGE 4 OF 7

Arrive

First impressions, the welcome and the wait.

4

18 Getting here

CHECK

Could a first-timer find you without stress?

QUICK WIN

Add a short “how to find us” paragraph and a photo of your front door to the confirmation.

19 Front door and first sight

CHECK

Walk up as a stranger. Faded signs, clutter or an unclear entrance? Is there a smile when they step in?

QUICK WIN

Do a walk-up once a quarter and fix what you see. Look up and smile as people arrive.

20 The expected welcome

CHECK

Does reception know who is due in next?

QUICK WIN

Greet new patients by name: “You must be James. Welcome, we’ve been expecting you.” Never underestimate the power of a welcome.

21 Waiting area

CHECK

Is it tidy, and is anything offered?

QUICK WIN

Offer tea, coffee or water to everyone, and clear the clutter.

22 Running late

CHECK

Does anyone tell patients who are waiting?

QUICK WIN

Tell them straight away, say roughly how long, and thank them for their patience.

STAGE 5 OF 7

Treat

The first minutes in the room and how the plan is explained.

5

23 Clinician introduction

CHECK

Does every clinician introduce themselves properly?

QUICK WIN

Name, role, and one line about how they work.

24 An agenda for the session

CHECK

Does the patient know what is coming?

QUICK WIN

“Here’s what we’ll do today: talk it through, have a look, then agree a plan together.”

25 Zoom in, zoom out

CHECK

Does the patient leave knowing why today mattered and what comes next?

QUICK WIN

Close every session in two steps. Zoom in: “Today we worked on X, and that moves you towards your goal.” Zoom out: “Next time we’ll focus on Y, which gets you closer still.”

26 The plan, in writing

CHECK

Does the patient leave with the plan, or only their memory of it?

QUICK WIN

Email the plan to the patient after the session.

27 Home exercises

CHECK

How do patients actually get their exercises?

QUICK WIN

Send them digitally, before the patient leaves the building. It is such a simple win.

OPTIONAL An exercise app such as Rehab My Patient

STAGE 6 OF 7

Pay

Payment and rebooking without the awkward moment.

6

28 The handover to reception

CHECK

Does reception have to ask “Do you want to book again?”

QUICK WIN

The clinician walks the patient out and hands over in front of them: “Thank you, Mrs Smith. Could you book Mrs Smith in weekly for the next three weeks?” Reception simply makes it happen.

29 Payment

CHECK

How many ways can someone pay?

QUICK WIN

Make it easy: cards including Amex, contactless and cash, with online payment as an option rather than a requirement.

30 Receipts and invoices

CHECK

Do patients have to ask for them?

QUICK WIN

Send them automatically, without being asked.

STAGE 7 OF 7

Leave

The goodbye, the follow-up and the reason to come back.

7

31 The goodbye

CHECK

Does the patient walk out while reception is on the phone?

QUICK WIN

Make eye contact, use their name, and confirm the next appointment out loud.

32 The 48-hour check-in

CHECK

What happens between the first and second visit?

QUICK WIN

Send a short text: “How are you feeling after your session? Anything come up?”

33 Remembering the person

CHECK

When a patient comes back in six months, does anyone remember them?

QUICK WIN

Keep a personal-details note in the record (the dog’s name, the children’s names, the holiday they had planned) and use it next time.

34 The review request

CHECK

Do you ask for reviews consistently, or only now and then?

QUICK WIN

Ask every patient at the same natural point, such as the end of their plan, with a link that takes two taps. Asking only happy patients breaks Google’s rules.

35 Lapsed patients

CHECK

Who has no future booking and hasn’t finished their plan?

QUICK WIN

Run a report each month and send a friendly check-in. Don’t try to get them back in, just say you hope all is well.

YOUR SCORECARD

Score all 35

Tick one box for each touchpoint. Then circle the frictions you could fix this week without spending a penny.

	TOUCHPOINT	DELIGHT	NEUTRAL	FRICTION
FIND				
1	Google Business Profile	○	○	○
2	Google reviews	○	○	○
3	Website condition pages	○	○	○
4	Social media profiles	○	○	○
5	Referrals	○	○	○
CONTACT				
6	The phone call	○	○	○
7	Missed calls	○	○	○
8	Email replies	○	○	○
9	Contact forms	○	○	○
10	Social media messages	○	○	○
11	Out of hours	○	○	○
BOOK				
12	Online booking	○	○	○
13	Price clarity	○	○	○
14	Booking confirmation	○	○	○
15	Intake form	○	○	○
16	Appointment reminder	○	○	○
17	Cancellation policy	○	○	○
ARRIVE				
18	Getting here	○	○	○
19	Front door and first sight	○	○	○
20	The expected welcome	○	○	○
21	Waiting area	○	○	○
22	Running late	○	○	○

	TOUCHPOINT	DELIGHT	NEUTRAL	FRICTION
TREAT				
23	Clinician introduction	○	○	○
24	An agenda for the session	○	○	○
25	Zoom in, zoom out	○	○	○
26	The plan, in writing	○	○	○
27	Home exercises	○	○	○
PAY				
28	The handover to reception	○	○	○
29	Payment	○	○	○
30	Receipts and invoices	○	○	○
LEAVE				
31	The goodbye	○	○	○
32	The 48-hour check-in	○	○	○
33	Remembering the person	○	○	○
34	The review request	○	○	○
35	Lapsed patients	○	○	○

YOUR ACTION SHEET

Pick three this week

Not 35. Three. Momentum beats perfection, and three changes that stick will do more than ten that don’t.

1

TOUCHPOINT

WHAT WILL CHANGE

WHO OWNS IT

DONE BY

2

TOUCHPOINT

WHAT WILL CHANGE

WHO OWNS IT

DONE BY

3

TOUCHPOINT

WHAT WILL CHANGE

WHO OWNS IT

DONE BY

Come back in a month and walk the journey again. You’ll spot the next three.

ClinicOS

You’re already on the list.

ClinicOS is the operating system behind our own clinic, broken into simple weekly steps: systems, team and culture, patient experience, marketing and compliance. We’ll be in touch when doors open.

> ## What’s the biggest headache in your clinic right now?
>
> Hit reply to the email this guide came with and tell us. We read every one, and it shapes what we build.

Rob and Laura run Dyer Street Clinic in Cirencester, a 28-person multidisciplinary practice offering chiropractic, physiotherapy, sports therapy, massage, podiatry, private GP care, diagnostic imaging and more.