

# The Patient Experience: CRAWL, WALK, RUN



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# Finding Your Way to Great Patient Experiences

**Every dental practice wants to give their patients a great experience. However, not every practice knows how to get there.**

That's why we put together the CRAWL, WALK, and RUN of patient experience, so that your practice's team can gain insight into where you might be succeeding, and where there might be room for improvement.

There are two main elements to the patient experience: the logistical side and the emotional side. They can be linked, but they are not necessarily linked. Your practice may be succeeding in one but not the other, or both!



# The CRAWL Level of Patient Experience

## The CRAWL Level of Patient Experience



 <b>The Logistical Side</b>	<b>The Emotional Side</b> 
<ul style="list-style-type: none"><li>• Manual reminders by phone</li><li>• Manual appointment confirmations by phone</li><li>• Forms are filled out at the office, by hand</li><li>• The patient needs to remember their insurance information for direct billing</li><li>• Staff members ask for feedback directly</li></ul>	<ul style="list-style-type: none"><li>• Likely a direct result of how task-heavy the logistical side is</li><li>• Little time to connect with patients</li><li>• No clarity on the dental practice's core values</li><li>• No clarity on expectations for staff in their treatment of each other or their patients</li></ul>

## The Logistical Side

First, the patient likely received a phone call from front-of-office staff to confirm their appointment. Their appointment reminder would also have been a phone call. At the time of one of these phone calls, instructions about the appointment would have been given by front-of-office staff. Among those instructions, the patient is required to come 15 minutes early to fill out paperwork. From the perspective of the staff member, this has been a time-consuming process as well. From Intiveo's conversations with patients, we have learned that some practices have done between 2<sup>1</sup> and 6<sup>2</sup> hours of phoning every day - leaving them time for little else.

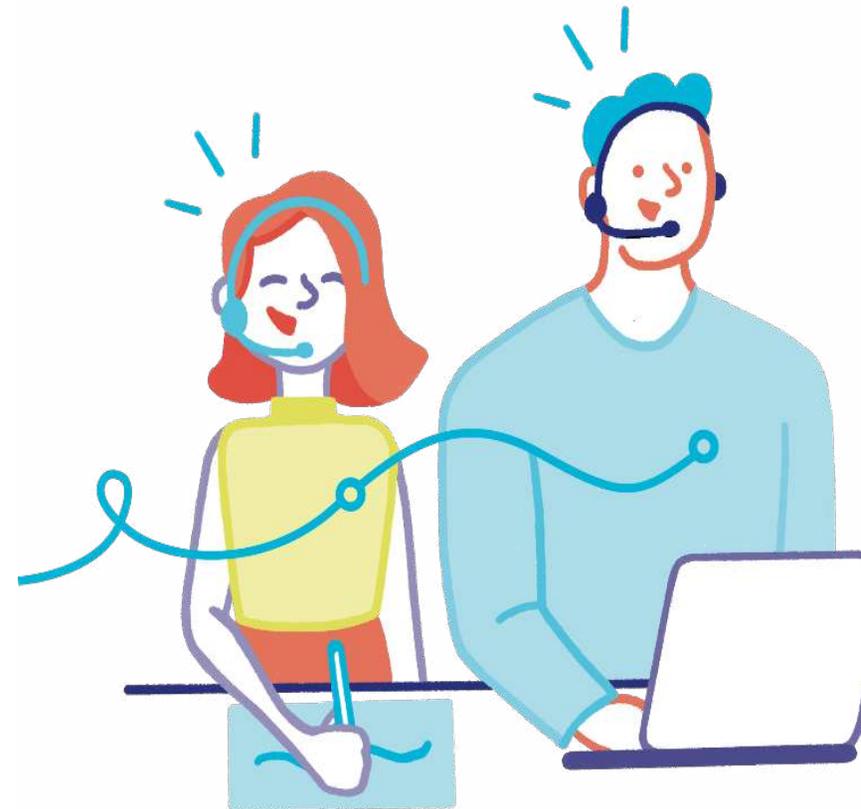
If the patient doesn't pick up the phone - which can often happen - dental practice and the patient will play telephone tag until they can connect. Or, they may not connect at all, resulting in a no-show or a late arrival to the appointment.

When the patient arrives, the front-of-office staff quickly checks them in and provides them with the paperwork. After the patient fills out the paperwork by hand, the staff then inputs it by hand into a computer. This can also present challenges for the staff in reading different - sometimes indecipherable - handwriting.

If the dentist is running late, the patient will be informed in the moment by staff. While the patient is waiting, staff are busy phoning other patients for confirmations or appointment reminders.

<sup>1</sup> Intiveo: SVSA Case Study

<sup>2</sup> Intiveo: Conestoga Oral SuSurgery Case Study



## The Logistical Side

After the appointment itself, any follow-up instructions will be given to the patient in hardcopy, on paper, for them to take home and use as a reference. The patient will need to remember their insurance details if the practice can bill directly, or the practice will issue a receipt and invoice for the patient to pass along to the insurance company. This creates extra work for the patient, which can often lead to frustration.

If the patient has feedback for the dental practice, they will either be moved to leave a Google review because of their experience, or they will give it in person, at the dental practice. If the staff has time in the middle of their busy work days, they might remember to ask for feedback or a review.



## The Emotional Side

Of course, a lot more goes into what a patient experiences at a practice than just the logistics. Going to the dentist can have an immense emotional impact on patients. It is key that the patient feels comfortable, safe, and cared for by both the healthcare provider and the staff.

The 'crawl' level for the emotional side of the patient experience is likely to be the result of how task-heavy the logistical side is. With a lot of manual tasks - phone calls, inputting paperwork, and so on - it is challenging for dental staff to be emotionally available to patients. They are often putting in longer hours or working through lunch breaks. Since the advent of Covid-19, dental work has changed considerably. Dentists themselves are obliged to do more administrative tasks.<sup>3</sup> What the result is, at many dental practices, is that dentists are not emotionally resourced to be empathetic and kind at appointments - simply because they don't have time.

In short, the 'crawl' level of this part of the patient experience will include staff who are largely unavailable for empathetic listening or communication with their patients.<sup>4</sup> The staff likely doesn't have agreed-upon expectations on how to treat patients. They probably also haven't had time to discuss the practice's core values.

This results in patients experiencing a lack of care and attentiveness from the dental practice's staff. They may feel anxious or reticent to engage with the dental practice - or indeed just go ahead and find a new dentist.

<sup>3</sup> [ADA: Economic Outlook and Emerging Issues in Dentistry October 2023 main report](#)

<sup>4</sup> [How Dental Office Culture Affects Your Patients - Dental Career Connect](#)



# The WALK Level of Patient Experience



## The WALK Level of Patient Experience

 <b>The Logistical Side</b>	<b>The Emotional Side</b> 
<ul style="list-style-type: none"><li>• Software has been installed - perhaps not every feature has been set up</li><li>• Some manual tasks now happen through the software, for ex., reminders</li><li>• Other tasks are still done manually, for ex., forms, insurance, feedback</li></ul>	<ul style="list-style-type: none"><li>• The dental practice team has realized that changes need to be made</li><li>• They are working on identifying core values and expectations at the practice</li><li>• However, on the patient facing side, little has changed</li></ul>

## The Logistical Side

At the 'walk' level of patient experience, it is likely that the staff has noticed some inefficiencies in their work. They have likely also noticed that patients aren't happy - they may be expressing frustrations, not leaving positive reviews, or even taking their business elsewhere.

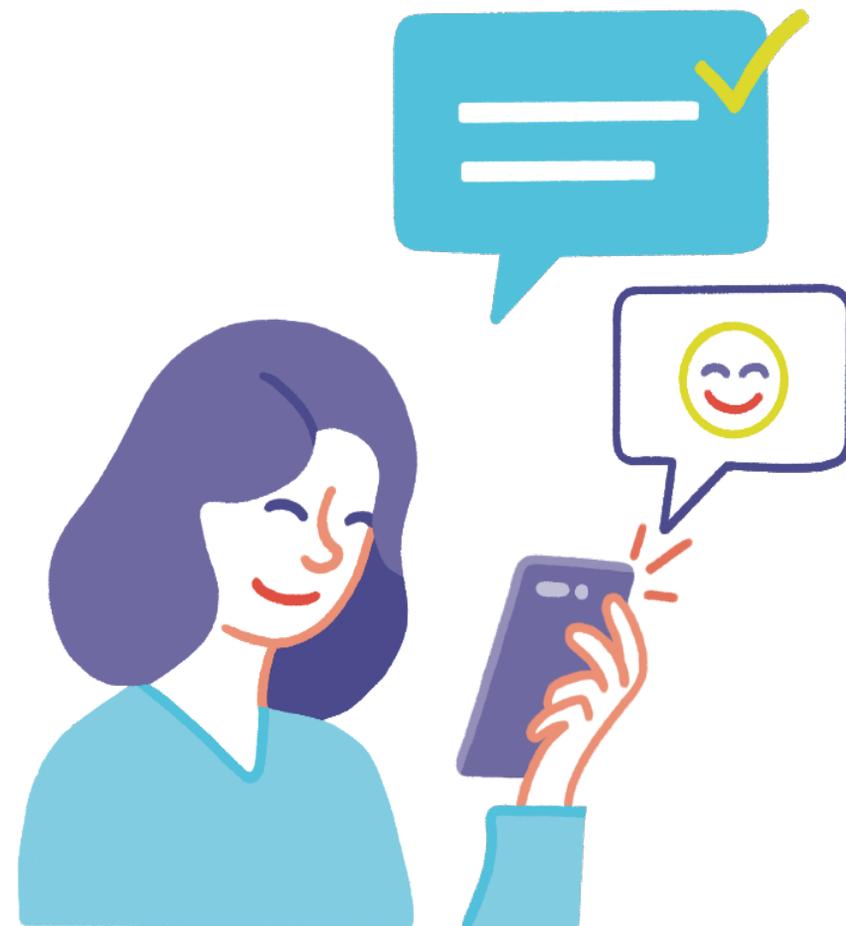
It's also probable that the staff themselves are expressing frustrations to each other, or that the toll of working through lunch hour or doing unpaid overtime has started to show in their work-life balance.

### **Contemporary lives tend to be busy ones.**

The ability to stay in touch with patients, in a way that is user-friendly for staff, is key to maintaining their loyalty.

At the 'walk' level, the dental practice team has chosen software to help them automate a number of these reminders. The ability to automate a phone message, email, or text will offer a great deal of time savings, since staff would be able to spend less time on manual phone calls. It will also decrease the number of no-shows.<sup>5</sup> Digital forms are another part of patient experience software that would save staff time. These forms could be attached to an appointment reminder or confirmation, and the patient can fill them out before they even get to the practice.

<sup>5</sup> Intiveo: Lakeside Pediatric Dentistry



## The Logistical Side

However, what defines the 'walk' level patient experience is that the software is not being used to its fullest potential.

### What does that look like from the patient's side?

Perhaps, the patient receives appointment confirmations and reminders by text. Consequently, their confirmation rate has vastly improved.<sup>6</sup> But, perhaps the digital forms part of the software has not been set up, so the patient still has to arrive early and has to remember their pre- and post-appointment instructions from a piece of paper. Perhaps, additionally, software that would allow the dental practice to bill the patient's insurance directly has not been set up, either.

Patients will also be informed by staff at the moment if the dentist is running behind. This can also lead to frustration.

While the staff may be saving a lot more time not having to do manual reminders, the patient is still not having an optimal experience. They may still arrive late and eat away at the time of their appointment by filling out paperwork. Or, they may have followed the instructions incorrectly, resulting in poor appointment outcomes. These experiences often result in frustration on the part of the patient. While they may not be as quick to take their business elsewhere, they are still receiving essentially the same service as they were before.

<sup>6</sup> [Intiveo: Blue Water Centre Case Study](#)



## The Emotional Side

To come to the 'walk' level of the patient experience, the dental practice staff has noticed that patients aren't happy. They may also have noticed that they are receiving mixed messages from the owner or manager of the practice about what is expected of staff. Certainly, by this point, the staff have managed to communicate that they don't have enough time in the day to complete their tasks - let alone take the time to connect personally with patients.

### **Their work-life balance is probably not doing great.<sup>7</sup>**

At the 'walk' level, the dental practice team has had an opportunity to sit down together. They have had a conversation about the core values of the practice.<sup>8</sup> They have also settled on what the expectations are for each member of staff.

What the patients will experience is hopefully more consistent, with staff more emotionally resourced to attend to their needs. However, because the dental practice team is still implementing how they will embody their values, there is still a great deal of room for improvement.



<sup>7</sup> [What Does Work-Life Balance Even Mean? | Forbes](#)

<sup>8</sup> [What Are The Core Values Of Your Dental Practice And Are You Living](#)

# The RUN Level of Patient Experience

## The RUN Level of Patient Experience



 <b>The Logistical Side</b>	<b>The Emotional Side</b> 
<ul style="list-style-type: none"><li>• Software is installed and being used to fullest potential</li><li>• Automated appointment reminders</li><li>• Automated appointment confirmations</li><li>• Automated recall reminders</li><li>• Digital forms and appointment instructions are integrated into messages</li><li>• Automatic Feedback Survey distribution post-appointment</li><li>• Ability to text patients directly and reach them immediately</li></ul>	<ul style="list-style-type: none"><li>• The dental practice team has agreed on and clarified their values</li><li>• Staff members understand the values</li><li>• Staff members understand expectations for treating their co-workers and patients</li><li>• Patients experience this has increased empathy and attentiveness at the practice</li></ul>

## The Logistical Side

At this level of the patient experience, the dental practice has set up their software fully. This means that appointment reminders, confirmations, and recall reminders have been automated, saving staff many hours in manual appointment reminders and confirmations. This has also been much more user-friendly for patients, since there is little-to-no telephone tag or missed voicemails. (Some software will allow patients to choose their preferred medium: text, email, or phone).

Plus, pre- and post-appointment instructions have been attached to automated messaging. This means these instructions are very accessible to patients, who always have them on their phones or computers. Attaching digital forms to this messaging is more user-friendly for patients and staff alike. The patient gets to fill out the forms on their own time, in the comfort of their own home. The dental practice team saves time by inputting the forms from handwritten ones. Not only this, but the potential for appointments beginning late decreases, because patients don't have to remember to come early, nor do they need extra time to fill out the forms.

The dental practice is also using software to its full potential in reference to insurance claims. Now, patients only have to provide their insurance information at their first appointment, and from then on, the practice can bill the insurance company directly.



## The Logistical Side

Patients and dental staff may also have the option of keeping in touch by text, so that the patient is informed in advance if the dentist is running behind.

With this improved version of the patient experience, the dental practice team is also able to ask for feedback a little more easily. As part of their automated messaging, they can ask for feedback in a survey after the appointment is over. The patient can then respond privately, on their own time. Constructive feedback can then be analyzed and responded to by the staff - and any changes that need incorporating can be actioned. If the patient has positive feedback, the team can ask them to leave a review on the social media of their choice.

**This can lead to a significant uptick in patient reviews!<sup>9</sup>**

All in all, this increased streamlining and efficiency values both the patients' and the staff's time. No-shows and missed appointments decrease, with staff able to take their breaks and complete their tasks within work hours. Patients come prepared and ready for their appointments.



<sup>9</sup> Intiveo: [Wayside Dental Centre Case Study](#)

## The Emotional Side

For the emotional side of this level of the patient experience, the dental practice team has agreed on their core values. Such values might include:<sup>10</sup>

- **Dedication**
- **Empathy**
- **Respect**
- **Accountability**
- **Consistency**

The team knows that these are the values that they are expected to bring to their work, as well as interactions with patients and with each other. Accountability to these values is built into weekly meetings, where the values are reiterated and discussed. Perhaps, at these meetings, staff are encouraged to congratulate others when they see their co-workers embodying these values. It's also probable that the owner or manager of the dental practice has provided training in empathetic listening or conflict resolution to the staff (including the owner or manager) to support them in their interactions with patients.

The patients are likely to experience this as an increased level of empathy and kindness from the dental practice team. They will feel actively listened to and cared for by staff members.



<sup>10</sup> [Experiences of dental care: what do patients value? | BMC Health Services Research](#)

# Who We Are

Intiveo is a leading cloud-based patient engagement platform used by 15,000 practitioners to communicate with over 18 million patients. Our goal is to continuously improve patient care by understanding communication needs, behaviors, and preferences – resulting in successful treatment outcomes. We are proud to be the first choice for OMS practices and academic institutions in Canada and the United States, as well as serving general practitioners and many other general specialties.

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