The Institute of Dental Business

making good practices great

Customer Journey 100

This questionnaire is designed to help you review the service you offer to your Customers, recognise what you are already doing really well and identify areas for improvement.

The most successful businesses consistently score 80/100 and above.

1. **Answer each question. If it applies in every situation, tick the box if not leave it blank. If it applies only sometimes or occasionally leave it blank.**
2. **Record your totals. Repeat the process identifying what you are doing really well and what needs improving.**
3. **Meet regularly as a team to set your goals and define your action plan.**
4. **Use your coach keep you focussed, and ensure you reach your target. It may take one month or two years, every step you take is a step in the right direction.**

	Date	Date	Date
Foundations	/26	/26	/26
Initial Contact	/11	/11	/11
Arrival- Initial meeting	/8	/8	/8
Pre meeting time	/5	/5	/5
Transitions	/3	/3	/3
Client consultation -diagnostics	/13	/13	/13
Contracting	/19	/19	/19
Reactivation of dormant quotes	/5	/5	/5
Après sale	/10	/10	/10
	/100	/100	/100

The actions I am going to commit to doing to raise my score are;

1.

2.

3.

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Foundations

- Our customer journey ensures that our clients receive a consistently excellent service from every member of staff.
- We understand that customers pass through our business like a baton in a relay race and part of our job is to prevent the baton being dropped.
- We have a system to escort the client through our business, the sales and delivery process.
- We understand that we are 'performers' at work and the show goes on no matter what.
- We understand that delivering an awesome service is about our business environment, how we make the client feel, delivering the clients' desired outcomes.
- We are all engaged in an ongoing programme of development, training and coaching to improve the service we offer.
- We meet as a team daily, weekly and monthly to review our performance and set goals.
- We have fun at work and enjoy the company of our colleagues
- We have organised our diary so we have sufficient time to offer an awesome service at all times.
- We know our ideal client.
- We have permission to use our intuition and respectfully say "No" to inappropriate clients.
- We are proud of the services and standard of work and care we offer.
- The entire team understands all the services we offer their features, benefits and outcomes to the client.
- We have high self esteem as individuals and as a team.
- We realise that life in business is a combination of highs, lows and unexpected events, and these do not affect our self esteem.
- We appreciate one another and communicate our appreciation and gratitude regularly.
- We understand the time, price, quality triangle and we offer high quality products and services with convenient time scales.
- We do not compromise on price.
- We are well rewarded for the work we do.
- We appreciate our customers.
- Our customers appreciate us.
- We all introduce appropriate special offers in to any conversations with have with clients.
- We all are able to recognise opportunities to cross-sell and up-sell our products and services and do when ever an opportunity arises.
- We understand that "No" can mean "No, never" or "No-not now" and we clarify every "No", asking "When would be appropriate" as necessary.
- We are actively building a reservoir of future sales.
- We have systematised the process of delivering critical non-essentials.

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Initial Contact
This relates to the first contact any prospect has with our business.

- Each telephone call is answered according to the business guidelines with a smile
- Our website represents us well and directs prospective new clients (PNC) to us.
- We record where all new client enquiries come from.
- New client enquires are reviewed monthly at a staff meeting.
- All new client enquiries, received via the web-site, telephone or in person, are issued with a welcome letter and welcome pack.
- When asked about a product or service we respond "What is about .... that you are interested in?"
- We always ask PNC if they would like to make an appointment to discuss their needs and how we can help.
- We convert 80% of new client enquiries to appointments
- We know this because we record enquiries and conversions.
- We have a system in our diary to prioritise new client appointments.
- We automatically issue a "thank you letter" to all referal sources.

Arrival- Initial meeting
This refers to the initial visit of a client or prospect to our offices.

- The approach to the front door and reception area is welcoming to all clients.
- The client is greeted on arrival by name, and the member of the team introduces themselves by name and role.
- We have a uniform which represents us and our services well.
- We issue a copy of our menu of services questionnaire for the client to complete.
- New clients are given a tour of the office as appropriate.
- The client is made welcome in the 'lounge' and offered refreshments
- The entire business environment is a true representation of the work we do and aspire to do.

Pre meeting time
This refers to the period of time the client is at our office, immediately prior to the client meeting.

- The Receptionists are informed by key personnel if there is risk of the meeting having a delayed start time.
- The receptionist keeps the clients informed if the meeting will be delayed and by how long.
- If we do run late, we have language to explain that this is because we are helping other customers and a system that is followed depending on the length of delays.
- There is literature and audio visual material available that advises the clients of the work and services we offer and the potential outcomes and benefits.
- There are testimonial letters available for the clients to read.

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Transitions

This refers to the movement of the client through the business.

- We have a system that ensures that the client is escorted through the business and not left alone.
- The escort introduces themselves and then the other staff to the client by name.
- Eye contact and acknowledgement is made in the introductions

Client consultation - Diagnostics

This refers to the meeting at which the clients' wants and needs are identified and the possible ways your business can deliver solutions are identified. This may actually be scheduled over more than one visit.

- The client is received to the 'client area' of the work place
- The client contact establishes good rapport with the client.
- The menu of services questionnaire is reviewed.
- The client contact establishes the clients' understanding of their current situation in relation to the goods and services you offer.
- The client contact establishes what the clients' emotional experiences are as a result of their current situation, in relation to the goods and services you offer.
- The client contact establishes clearly the clients' understanding of where they want in relation to the goods and services you offer, in the short and long term.
- The client contact establishes what motivates the client to achieve these outcomes
- The client contact establishes clearly what has prevented the client from achieving this before.
- The client contact establishes clearly what the clients' time scales are.
- The client contact establishes clearly what the clients' budget or budget restrictions may be.
- The client contact reassures the client "we are able to help you"
- We establish the clients' preferred 'representational system.' (VAKOG)
- We document evidence of the clients current situation with photographs, samples, examples as appropriate to record the 'current situation'

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Contracting

This relates to defining and agreeing the work to be undertaken of behalf of your client, and reviewing your terms and conditions of service.

- The client contact discusses the possible options with the client in terms of their desired outcomes.
- The possible options are presented in an appropriate representational system for the client (VAKOG)
- Where appropriate the client is given information of alternatives available.
- Any objections to commencement of the work are dealt with.
- The client contact and client agree on the planned action
- The job schedule and all planned meetings, actions etc are entered onto the computerised client management system.
- The client is provided with an estimate of costs detailing the work to be completed with a set of terms and conditions.
- Contracting discussions are held in a private area away from reception, prior to starting the work.
- If finalising the contract is being done by the some one other than the client contact, they confirm precisely what the agreed action plan is.
- The Welcome pack is reviewed and the client is explained our terms and conditions- 'what you can expect from us' and 'What we can expect from you'
- We give our clients payment options and these are agreed with the client.
- The client contact /Receptionist explains to the client what the next steps are going to be.
- The client is advised about any membership plans or retainer options, and asked if they want to join.
- 2 copies of the action plan and payment agreement are signed, one for client, one for business.
- Payments are taken.
- If further appointments are needed, these are made so that the client does not leave the business without their next appointment.
- Client is allocated and informed of their point of contact if there are any queries and given permission to call.
- If client is not to proceed immediately, a convenient time is arranged for the client contact or receptionist to call them again. (If not now.... When?)
- The client is escorted away from the meeting place.

Reactivation of dormant quotes

- Every month a report is generated to identify quotes generated and not actioned.
- Each client is called to be invited to go ahead.
- Any client objection is overcome
- If client not wanting to start now is asked "if now is not a good time when would be a good time for us to speak again" this date is diarised and details recorded on the computer.
- All diarised calls are made as agreed.

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Après sale

- We ensure that we have achieved the clients' desired outcomes using some form of customer satisfaction feedback conversation or form.
- We collect evidence of the final product with photographs, samples etc.
- We have a system to thank the Client thank for their business.
- We have a system to request a testimonial letter.
- We have a system to request referrals.
- A time is agreed to speak to the client again and set on the computer.
- A post 'job' letter is sent to the client with if relevant containing evidence of before and after so the client can see the benefit of working with you.
- Client grading is reviewed and recorded.
- A customer satisfaction / feedback call is made one week following the end of the 1job' to find out what we did really well and how we could improve.
- Feedback data is collated and reviewed at the in- house monthly meetings.