



# Retail Readiness Evaluation

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[Client Name]  
[City, State]

[Date Conducted]

Conducted by:  
[Team Member's Name]

## RETAIL READINESS EVALUATION

CUSTOMER KNOWLEDGE	● Yes ○ No
1. We have sorted our customer population by zip code to better understand our draw area.	○
2. We track how our new patients learn about our practice/provider.	○
3. Our computer system is set up to track demographic data such as patient age, sex, marital status, family size, employment status and address.	○
4. Our computer system is set up to track classes of chronic clinical diagnoses such as diabetes and asthma.	○
5. We can sort our customer database by demographic and/or clinical diagnosis categories.	○
6. We track the reasons why our customers leave our practice.	○
7. We routinely ask our patients how we performed on their most recent visit to our office.	○
8. We ask our patients what additional services they would like us to offer.	○
9. We ask our patients what information they would like about their health and medical care.	○
10. We identify the needs, wants, and priorities of our customers and make them part of our training and process improvement efforts.	○
11. We have a suggestion box in our reception room and in our exam rooms to solicit customer comments and concerns.	○
12. Periodically we formally survey both active and inactive customers to supplement the knowledge gained by surveying our frequent visitors.	○
13. We contact our patients about their satisfaction with the providers to whom we refer them for services since these referent physicians reflect on our image.	○
14. Our physicians, management and staff routinely discuss the results of our surveys and suggestions and develop action plans to address practice problems and to take advantage of positive suggestions.	○
<b>CUSTOMER KNOWLEDGE: Total Capabilities Identified _____ ÷ 14 x 10 = (Rounded to the nearest whole number)</b>	

CUSTOMER ACCESS	● Yes ○ No
15. We offer extended hours for the convenience of our customers.	○
16. We offer weekend hours for the convenience of our customers.	○
17. We are able to accommodate all requests for acute appointments every day.	○
18. We track our ability to respond to a customer's first and second requests for an appointment.	○
19. We answer the telephone by the third ring.	○
20. We never leave a patient on hold more than 30 seconds.	○
21. As an alternative to placing a customer on hold, we offer to have the appointment desk return calls within 15 minutes.	○
22. Our appointment desk offers other practice providers as options if the requested provider is not available.	○
23. Our appointment desk offers other network providers if our providers are unavailable.	○
24. Our providers have a liberal "work-in" policy.	○
25. We use wave scheduling or open access scheduling alternatives.	○

- 26. We use mid-level providers to handle acute cases that our physicians cannot work into their schedules.
- 27. Our appointment desk is trained to ask appropriate questions in order to schedule adequate time for the requested visit.
- 28. Patients can find our office easily because we are all trained to provide clear directions from main thoroughfares throughout our community.

<b>CUSTOMER ACCESS:</b> Total Capabilities Identified _____ ÷ 14 x 10 = (Rounded to the nearest whole number)	
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<b>CUSTOMER EXPECTATIONS</b>	<b>● Yes ○ No</b>
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- 29. We promote "get acquainted" visits to new customers at no charge.
- 30. We have a practice brochure that explains our policies and answers frequently asked questions, including ways to reach us after hours, how to handle prescription refills, and financial matters.
- 31. We send Welcome Packets to new customers in advance of their first visit.
- 32. In addition to taking a patient's vital signs and noting the chief complaint, our clinical staff always asks the patient what his or her objectives are for the visit and notes those objectives for the provider.
- 33. Our providers note the patient's objectives for the visit in their initial communication with the patient upon entering the exam room.

<b>CUSTOMER EXPECTATIONS:</b> Total Capabilities Identified _____ ÷ 5 x 10 = (Rounded to the nearest whole number)	
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<b>CUSTOMER SERVICE TEAM</b>	<b>● Yes ○ No</b>
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- 34. We hire outgoing, friendly staff members who view customer service as part of their personal mission in life.
- 35. Our current staff members recommend new hires they think will "fit" our customer-focused culture.
- 36. Each of our staff members receives formal training in customer service techniques.
- 37. All staff members go through a formal customer service training process annually.
- 38. Our staff members frequently receive unsolicited cards, letters and other compliments from patients regarding their quality of care.
- 39. Customer service is one of the critical factors in every staff member's performance appraisal.
- 40. All of our staff members are well trained in their technical role within the practice. Trainees are identified for customers.

<b>CUSTOMER SERVICE TEAM:</b> Total Capabilities Identified _____ ÷ 7 x 10 = (Rounded to the nearest whole number)	
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<b>CUSTOMER SERVICE CULTURE</b>	<b>● Yes ○ No</b>
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- 41. We have established a customer "bill of rights" expressing our commitment to our patients and their families.
- 42. We place our customer "bill of rights" in various places throughout our practice in order to educate our patients and remind ourselves of our commitments.
- 43. We openly display nice photos of our providers and staff members along with our commitment to patient care in the reception room. A notebook containing photos and brief biographies of our providers and staff members is also available for customer review in our reception area.

- 44. We hold weekly staff meetings and discuss customer service as one of the agenda items.
- 45. We hold periodic "brown bag lunches" to process improve each step in the customer service process.
- 46. We are always "experimenting" to improve the *experience* of our patients and customers.
- 47. Staff members are encouraged to look for examples of caring customer service provided by their peers.
- 48. We have a set of "rewards" to celebrate examples of outstanding customer service on the part of staff and physicians.
- 49. Our physicians routinely compliment staff members for their customer service orientation.
- 50. We occasionally use a "mystery shopper" to test our performance. The mystery shopper completes a formal survey, which is provided to the office manager for discussion during a staff meeting.
- 51. We track customer flow through the practice tenaciously! We understand and overcome bottlenecks that cause our customers to wait for service.
- 52. Our providers use "social progress" notes in the chart to help them remember special thoughts, children and grandchildren, hobbies, vacations, special events, accomplishments and concerns shared by customers in the exam room. The provider and staff in Welcome Letters, when refilling prescriptions, and on subsequent visits reference these social notes or non-medical history.

<b>CUSTOMER SERVICE CULTURE:</b> Total Capabilities Identified _____ ÷ 12 x 10 = (Rounded to the nearest whole number)	
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<b>CUSTOMER SERVICE POLICIES</b>	<b>● Yes ○ No</b>
53. Managers and providers compliment in public and provide negative feedback in private.	<input type="radio"/>
54. Yes, in our practice the customer is still always right.	<input type="radio"/>
55. We never cancel a customer's appointment with us – ever!	<input type="radio"/>
56. We never talk about patients or customers in negative terms.	<input type="radio"/>
57. The first staff member to hear a customer's concern owns that concern until it is resolved.	<input type="radio"/>
58. Owners complete an incident card on every complaint for review during staff meetings.	<input type="radio"/>
59. We use patient and customer names in addressing them, whenever possible.	<input type="radio"/>
60. Every patient deserves a smile, whether in person or on the telephone.	<input type="radio"/>
61. In order to ensure customer comfort, serving as a chaperone is a clinical assistant's top priority, even if exam rooms are left open for brief periods of time.	<input type="radio"/>
62. We staff our office to keep receptionists "receiving" and clinical assistants "assisting," thereby maximizing the customer's experience and the provider's productivity.	<input type="radio"/>
63. Every customer complaint receives a signed letter from the provider apologizing for the frustration, discussing how the issue is being corrected, and asking the customer to provide additional feedback on the next visit. This letter is kept in front of the customer's chart so the clinical assistant and the provider can solicit comments during the next visit.	<input type="radio"/>
64. Our network monitors common drug and supply costs at various pharmacies in our market area to share with our customers in order to save them money. They publish this information for our offices.	<input type="radio"/>

<b>CUSTOMER SERVICE POLICIES:</b> Total Capabilities Identified _____ ÷ 12 x 10 = (Rounded to the nearest whole number)	
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EDUCATION/PROMOTION	● Yes ○ No		
65. Our computer system can create mailing lists for our customer population or subsets of that population.	<input type="radio"/>		
66. We have developed or acquired patient education information on topics of importance to our customers, which we distribute upon request in the exam room.	<input type="radio"/>		
67. We stratify our customer population based upon age and sex in order to provide educational materials and encourage appropriate physical and screening examinations.	<input type="radio"/>		
68. We have a designated receptionist who follows up on screening campaigns to set up appointments for interested customers.	<input type="radio"/>		
69. Our customers know that we are interested in their referrals of friends and relatives.	<input type="radio"/>		
70. We have implemented a referral reward system for customers who refer their friends and relatives to us.	<input type="radio"/>		
71. We use "personalized" Welcome Letters for every new patient, including the doctor's signature and personal comment.	<input type="radio"/>		
72. Our providers are active in promoting health education in the local community through speaking engagements, articles written for lay publications, radio and television interviews, health fairs, and other occasions. Part of our office manager's responsibility is to facilitate these opportunities.	<input type="radio"/>		
73. Our clinical assistants give educational materials to customers in the exam room based upon their requests. Our providers note customers' interests and provide additional educational materials based upon their diagnosis(es). These educational materials are made available through our network and professional affiliations.	<input type="radio"/>		
74. Each day our providers identify and spend fifteen minutes calling certain "key" patients, personally. Those key patients may include family members, other professionals, those expressing particular concerns about a diagnosis or referral, etc.	<input type="radio"/>		
75. We routinely use statement stuffers as an avenue to provide education and personal messages for our customers.	<input type="radio"/>		
76. Our providers and staff members recognize the potential for customer referral in every human interaction, including pharmacists, hospital administration and staff, insurers, drug reps, and others. All are treated with dignity and respect.	<input type="radio"/>		
77. We have a well-designed advertisement in the Yellow Pages.	<input type="radio"/>		
78. We direct mail or participate with Welcome Wagon or other agencies that greet new patients moving to our market.	<input type="radio"/>		
<table border="1"> <tr> <td data-bbox="228 1302 1289 1398"> <b>EDUCATION/PROMOTION: Total Capabilities Identified _____ ÷ 14 x 10 =</b>            (Rounded to the nearest whole number)         </td> <td data-bbox="1289 1302 1468 1398"></td> </tr> </table>		<b>EDUCATION/PROMOTION: Total Capabilities Identified _____ ÷ 14 x 10 =</b> (Rounded to the nearest whole number)	
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CUSTOMER EXPERIENCE	● Yes ○ No
79. Every customer is greeted by a warm smile within seconds of entering our office.	<input type="radio"/>
80. We do not separate our receptionist from our customers by glass or any other barrier.	<input type="radio"/>
81. We provide soft music in our reception room.	<input type="radio"/>
82. Our reception room is always clean and comfortable.	<input type="radio"/>
83. We provide a telephone in our reception area for patients to use in making local calls.	<input type="radio"/>
84. We set <b>short</b> "wait" time objectives, report our average "wait" time to our customers and commit to reducing that wait time.	<input type="radio"/>
85. We "manage" our reception room by communicating with our customers frequently, particularly if the provider is running behind. Our customers never need to guess.	<input type="radio"/>

- 86. Our receptionist completes a short reception room evaluation at least once each day.
- 87. We provide a variety of current reading materials for our adult customers and frequently cleaned toys for our young patients.
- 88. Our examination rooms are always clean and comfortable.
- 89. Our clinical assistants "manage" their assigned exam rooms by communicating frequently with customers awaiting the provider. Communication includes their position in the line.
- 90. When a customer must disrobe for the examination we always offer a cloth gown.
- 91. We provide a private area for our customers to discuss financial matters and schedule follow-up appointments with our cashier.
- 92. We warmly thank each of our customers for coming to see us "today."
- 93. We recognize the accounts receivable management process as part of the customer's experience with our office. Our entire process, including pre-collections, maintains the dignity of the customer.

<b>CUSTOMER EXPERIENCE:</b> Total Capabilities Identified _____ ÷ 15 x 10 = (Rounded to the nearest whole number)	
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<b>RETAIL PRACTICE EVALUATION SCORES</b> (Transfer totals from previous sections)	
Customer Knowledge	
Customer Access	
Customer Expectations	
Customer Service Team	
Customer Service Culture	
Customer Service Policies	
Education/Promotion	
Customer Experience	
Total	
<b>OVERALL SCORE ÷ 93 x 10 =</b> (Rounded to the nearest whole number)	