

Customer Service

Prepared by Prishita Vora – Healthcare Operations Consultant

CLINIC OPERATIONS EXCELLENCE CHECKLIST

How High-Performing Healthcare Facilities Actually Run

Use this checklist to assess gaps in your clinic operations, patient experience, and staff performance.

1. PATIENT EXPERIENCE & FRONT DESK

- Patients are acknowledged within 10 seconds of arrival
- Staff maintain eye contact and greet patients respectfully
- Waiting times are communicated clearly and proactively
- Reception workflow is structured (registration, billing, triage separated)
- Patient journey from entry to exit is clearly defined and efficient
- Complaints are handled immediately and documented
- Patients are never left confused about next steps

2. STAFF PROFESSIONALISM & PRESENCE

- Staff uniforms are clean, well-fitted, and professional
- ID badges are visible at all times
- Staff arrive on time and handovers are structured
- Clinical and non-clinical areas are clean and organized
- Staff maintain professional posture, tone, and conduct
- Environment reflects order, safety, and discipline

3. COMMUNICATION STANDARDS

- Patients are addressed respectfully (Sir/Ma'am or formal name)
- Staff avoid casual or inappropriate language
- 10/5 Rule is consistently applied (eye contact + greeting)
- Procedures and delays are clearly explained
- Staff check for patient understanding
- Patients are not ignored at any point in the facility

4. A.I.D.E.T SYSTEM IMPLEMENTATION

- Staff acknowledge patients immediately
- Staff introduce themselves and their role clearly
- Time expectations are communicated (wait, procedure, results)
- All actions are explained in simple, non-medical language
- Patients are asked if they have questions
- Interactions are closed with appreciation and reassurance

5. PATIENT ROOM PROTOCOL

- Staff knock before entering
- Staff introduce themselves upon entry
- Purpose of visit is clearly explained
- Eye contact is maintained during interaction
- Devices (e.g. computers) do not block patient engagement
- Patient privacy and dignity are maintained at all times

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6. OPERATIONAL EXCELLENCE (THE “SILENT CARE”)

- Departments are fully stocked at all times
- Staff do not leave patients to search for supplies
- Noise levels are controlled in clinical areas
- Facility maintains a calm, organised environment
- Cleanliness is consistently maintained across all areas
- Waste is properly managed and disposed
- Facility reflects infection control standards visually

7. CUSTOMER SERVICE & RETENTION

- Patient complaints are resolved immediately where possible
- Staff are trained in handling dissatisfied patients
- Feedback is actively collected and reviewed
- Service recovery processes are in place
- Staff understand impact of poor service on retention
- Patient experience is treated as a revenue driver

8. INTERNAL TEAM CULTURE

- Staff communicate respectfully with each other
- Positive reinforcement and recognition is practiced
- Gossip and negative behaviour are actively discouraged
- Tasks are completed on time and handed over properly
- Team members collaborate and support each other
- Conflicts are handled professionally and constructively

9. SYSTEMS & WORKFLOW

- Patient flow is mapped and regularly reviewed
- Bottlenecks (reception, consultation, billing) are identified
- Appointment scheduling is structured and controlled
- Staff roles are clearly defined
- SOPs exist for key operational processes
- Operations are system-driven, not person-dependent

FINAL SELF-ASSESSMENT

If you identified gaps in:

- **1-3 areas** → **Minor inefficiencies**
- **4-6 areas** → **Moderate operational risk**
- **7+ areas** → **Significant performance and compliance gaps**