



Consultation Process Assessment

Purpose: To compile information about your consultation process and strategies.
 Preparation: Gather the information necessary to answer questions about your patient flow/processing, staff training and roles, procedures, and follow-up.

Practice name: _____ Date: _____

General information

- A. We perform _____ LVC consultations/week.
- B. Our consultations usually take _____ (hours) to complete.
- C. Typically, _____ % of our consultations convert to LVC surgical patients.
- D. The key person(s) responsible for the consultation is/are:

- E. Our conversion-to-procedure rate varies substantially depending on who handles the consultation:
 Yes No
- F. Our LVC consultation process can briefly be described as follows (from patient arrival to departure, include who is involved in each major step and their role):

- G. We show a feature/benefit videotape during the consultation:
 Yes No
- H. We show an informed consent videotape during the consultation:
 Yes No
- I. We discuss monovision as a routine part of our consultation:
 Yes No

Diagnostic testing

- A. During the consultation we perform the following diagnostic tests: (check all that apply)
 - Patient medical history
 - Lensometry
 - Auto refractor
 - Corneal topography
 - WaveScan WaveFront® diagnostic analysis
 - Pachymetry
 - Pupillometry
 - Eye dominance
 - Manifest refraction
 - Cycloplegic refraction
 - Tonometry
 - Other (please specify)

- B. Typically, the doctor spends _____ (time) with the prospective LVC candidate answering their questions and discussing the testing that was performed.

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Patient experience

- A. We are usually able to schedule an interested prospect for a consultation within _____ days/weeks (circle the correct unit) of the time they call.
- B. Upon arrival, the prospective patient is greeted by _____ (person/position).
- C. When a prospective patient arrives for their consultation, they usually wait _____ minutes until their consultation begins.
- D. During the consultation, our prospective patients are handed off _____ times and are in contact with _____ different staff members.
- E. The most frequent complaint we get about our consultation process is:

- F. The most frequent compliment we get about our consultation process is:

Staff training

- A. Our staff has received training in the following areas to assist in the consultation process: (check all that apply)
 - LVC procedure information
 - Practice/doctor information
 - Patient financing options/programs
 - Frequently asked questions (FAQ)
 - Sales techniques
 - Personality types
 - Customer service skills
 - Their role in the overall process
 - Other (please specify)

Follow-up

- A. When a patient who completes a consultation (and is deemed to be an appropriate candidate for LVC) does not decide to schedule their procedure, we follow up in these ways: (check all that apply)
 - Phone call
 - Letter
 - E-mail
 - Fax
 - Provide patient reference list
 - Other (please specify)

Effectiveness

- A. When considering the consultation process of our practice, I would rate the effectiveness of our skills as _____ on a scale from 1 to 10 (10 = highly effective).

WHAT NOW?

Share your completed worksheet with your BDM as you work together to develop an Action Plan. Keep your completed worksheet for future reference—it will serve as an instructive benchmark of your practice at this point in time.