HARBOR
GROWTH SYSTEMS

THE WINNING PRACTICE / PATIENT JOURNEY WORKSHEET

Find the gaps before adding more.

A companion to the patient-journey self-check. Record what you know, what is uncertain and what needs attention. This worksheet is not a clinical review or a revenue forecast.

Practice name / date (optional)

01. When someone searches for the service you most want to grow, how confident are you that they find your practice?

Your answer and supporting evidence

02. Do you know which sources (search, referrals, social, ads) bring in your inquiries?

Your answer and supporting evidence

03. Does your website explain your key services in plain language, including what the first visit involves?

Your answer and supporting evidence

04. On a phone, how easy is it to request an appointment or consultation from your site?

Your answer and supporting evidence

Intake and follow-through

Use your current process, not the process you hope to have. Unknown is a useful answer.

05. When a website form or message comes in, who is responsible for replying?

Your answer and supporting evidence

06. How consistently are new inquiries answered the same business day?

Your answer and supporting evidence

07. When someone asks about treatment but doesn't book, what happens next?

Your answer and supporting evidence

08. Can you see how many inquiries became booked and attended visits last month?

Your answer and supporting evidence

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Map the next priority

Where does the patient journey lose momentum? Note the owner, evidence and next action for each step. Keep figures aggregated.

Being found / owner / what happens / where it stalls

Website clarity / owner / what happens / where it stalls

First response / owner / what happens / where it stalls

Follow-through / owner / what happens / where it stalls

First priority to discuss with Rachel

What would you check, and who owns the next action?

Request a Growth Review: harborgrowthsystems.com/growth-review