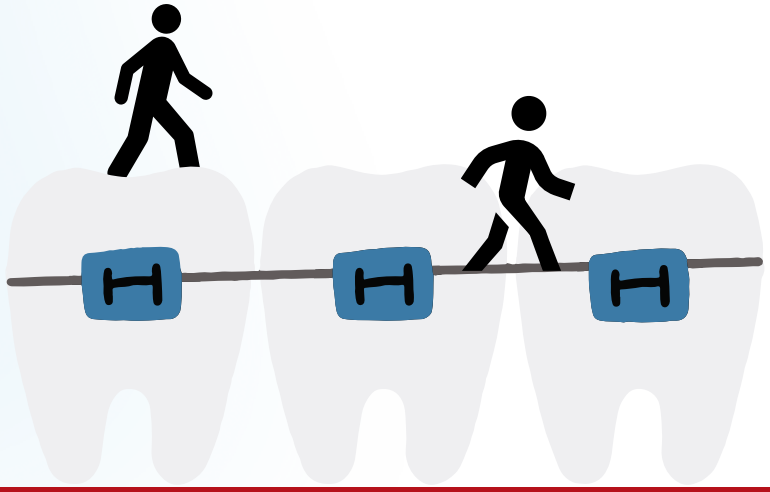


Patient Experience Design Template

A worksheet to help you define and actualize your desired patient experience

About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN

Vision & Brand Identity

- Define the practice's core values and personality *(e.g., "fun and whimsical," "modern and sleek," "family-friendly and warm")*
- Identify the emotional outcome youd want want patients to feel before, during, and after their visit *(e.g. confident, relieved, excited to return)*
- Establish brand elements that should be reflected in the space and through integrations (colors, scents, soundscape, theme)

About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN

Pre-Visit Experience

Awareness & First Impressions:

- Website and Google Listings should feature:
  - ☐ Photos of the office
  - ☐ Introductions to the team
  - ☐ Easy contact options
- Social Media touchpoints should feature:
  - ☐ Welcoming tone
  - ☐ Visuals that align with office brand identity
- Referrals materials
  - ☐ Ensure referring providers have branded materials to hand patients

Appointment Access:

- ☐ Online scheduling options ready: desktop & mobile
- ☐ Pre-registration forms, insurance uploads, and payment method storage
- ☐ Welcome email/text: includes parking instructions, what to expect, and a friendly introduction

About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN

Arrival & Check-In

Getting there:

- [ ] Signage and wayfinding from parking lot to entrance
- [ ] Curb Appeal: landscaping, lighting, signage style

Getting Settled once Inside:

- [ ] Specify whether front desk staff greet by name or standing
- [ ] Waiting room flow: check in kiosk vs. personal greeting
- [ ] Patient amenities: water/coffee station, charging stations, seating comfort.

Sensory design considerations:

- [ ] Sight: color palette, natural light, art/decor
- [ ] sound: music, sound masking, children's area noise mgmt
- [ ] Smell: calming scents, fresh/ clean environment



About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN

Patient Flow & Clinical Experience

What should patients notice in the treatment area?

- [ ] Escorting patients from waiting area to treatment room
- [ ] Staff scripting for introductions
- [ ] Comfort measures: blankets, headphones, stress-relief options.
- [ ] Visibility of technology (showing state-of-the-art while not overwhelming)

About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN

Communication & Education

How will you engage patients:

- [ ] Clear explanation of diagnosis and treatment plan
- [ ] Visual aids: intraoral cameras, animations, before/ afters
- [ ] Written or digital take home summaries
- [ ] Staff trained to answer FAQs and reinforce messages

About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN

Check-Out & Post-Visit Experience

Steps to follow during check out process:

- [ ] Scheduling next appointment before leaving
- [ ] Flexible payment options: stored cards, online portals
- [ ] Printed and/or digital treatment and follow-up instructions
- [ ] Personal thank-you (verbal, email, or text)

About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN

Ongoing Relationship & Loyaly

How will you engage with patients after they've left:

- [ ] Automated follow-up texts/emails: reminders, thank-yous, treatment milestones.
- [ ] Easy process to leave Google Reviews
- [ ] Referral Program (family & friends)
- [ ] Seasonal newsletters or educational content
- [ ] Community building activities: open houses, patient appreciation events, partnerships with schools or local businesses.

About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN

Periodic Evaluation & Refinement

How will you further refine patient experience:

- ☐ Quarterly team review of patient experience: survey results, feedback, online reviews
- ☐ Adjustments to office flow, amenities, or staff scripts
- ☐ Ongoing training for staff on hospitality and communication

About Masserano Practice Design & Development

At Masserano Practice Design & Development and Align, we specialize in helping dental professionals build practices that are efficient, resilient, and designed for long-term success. From real estate strategy and architectural planning to equipment integration and operational workflows, we bring decades of experience guiding doctors through every phase of their practice journey - including how to prepare for and respond to the unexpected.

www.masseranopractices.com
800-605-7290
hello@masseranorec.com

ALIGN