

ALLIED
Physical Therapy
WELLNESS COMMUNITY

The Path: Guest Journey

OUR VALUE

Communicating the importance of completing treatment

Many of our guests have come to us because their doctors told them to. They have not yet “bought in” to their treatment plan – seeing our clinic and the professionals who work here as their ticket to better mobility, less pain, and getting back to doing what they love to do.

This is where we come in! We need to communicate with our guests right from the very first visit *how* we intend to get them back to doing what they love – what exactly they will need to do to get there, and how exactly we will help them on that journey.

Being able to communicate our value is the most important skill we can have. If our guests don’t believe we are the solution, then we can’t help anyone!

YOU are the Guides on our Guests' Journey through the Allied Wellness Community

1

First Contact

- Guest phones or emails us
- We phone or email guest when doctor referral received. Conduct the Ultimate Initial Phone Call. See appendix A.

2

Schedule First Visit

Guest Service Guide

- **#1 Goal** is to get guest to agree to come in for an evaluation or Discovery Session
- **Evaluation:** No less than 40 minutes on schedule, includes treatment
- **Discovery Session:** No more than 20 minutes on the schedule. Free consultation. No treatment.
- **Welcome Email:** Explain to guest the important information contained in the email, and instruct them to reference spam or junk folder if email is not received:
 - Location, Directions
 - What to Wear
 - What to Bring: MRIs and imaging
 - New Patient Paperwork
 - Physical Therapy FAQ eBook

3

Introduction to Journey: 10 minutes

Business Guide

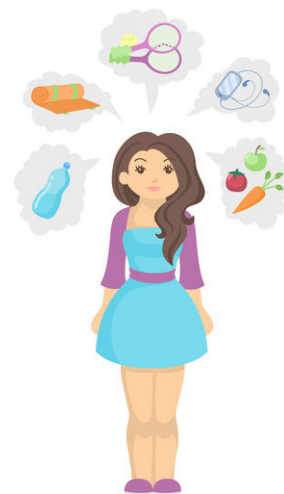
- Congratulate guest for taking the first step toward getting back to what they love!
- Give guest a brief overview of the journey (introduce the folder).
- Walk guest through Benefits Description Form.
- Discuss the availability of flexible payment options with no-interest promotions for co-pays, add-on services, or self-pay through Care Credit.
- Discuss benefits and terms of cash packages for self-paying guests.
 - Answer any questions guest may have, and instruct how to contact Business Guide directly.
 - Ensure we have guest's contact information and ask what is the preferred way of contacting?
 - Address possible objections/obstacles (financial, transportation, schedule) and offer solutions:
 - Care Credit
 - Telehealth
 - Transportation options



4

First Clinical Contact: 5 minutes*Wellness Guide*

- It is important to make the guest feel valued!!! Be enthusiastic about your role in getting them back to what they love!!
- Introduce yourself; explain who you are and what your role will be on their treatment journey.
- Ask questions about their condition, injury or the circumstances that led them to Allied. *Actively* listen.
- Explain how their treating therapist or doctor – provide name – is phenomenal in that area. Give an example or relay a story about how you have seen others with that condition/injury get back to what they love after therapy.
- Explain the treatment process: Doctor/therapist will come in, whether they need to undress, add-on options available, go to gym, etc.
- Explain how you and your colleagues will assist in treatment and/or how you personally will return after session to assist with departure.
- Explain the role of the Folder in completing “the journey,” and prepare for hand-off to guest services
- Escort up to check out, thank them, express enthusiastic anticipation of next session.



5

Doctor Evaluation / Discovery Session: 30-45 minutes for Eval; 10 minutes for Discovery

Doctor / Therapist

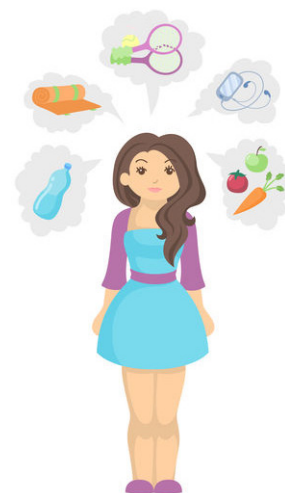
- Refer to Wellness Guide's notes before entering treatment room.
- Conduct examination. Conduct Ultimate Initial Evaluation (see appendix B).
- Discuss the patient's condition or injury – explain exactly what is wrong and how you are going to go about treating them.
- Explain how our Wellness Guides will assist in executing the treatment plan you will prepare to get them back to what they love.
 - Go through the Journey Form with the guest and answer any questions that they may have about their treatment program or upcoming visits.
 - Explain the progress that they can expect to see – and when they can expect to see it.
 - Complete Wellness Guide Instruction Sheet (physical card, or digitally on Clinicient).



6 First Visit Wrap-Up: 5 minutes

Wellness Guide

- Ask the guest how they did. Ask them what they thought of the doctor or therapist. Ask them if they have any questions for you.
- Provide instructions on the exercises that they should be doing at home – and how often they should be doing them.
- Point out the bundles that have been assembled and have been recommended by their doctor that will help them continue their exercises at home. Ask if they would like to purchase.
- Walk the guest to the guest services desk and assist them with appointment scheduling in accordance with doctor or therapist's recommendations.
- Address any guest objections about scheduling future appointments by providing solutions – TeleHealth, transportations options, financial options.
- Express enthusiastic anticipation of seeing them again and expectation of seeing improvement.



7

Check-Out

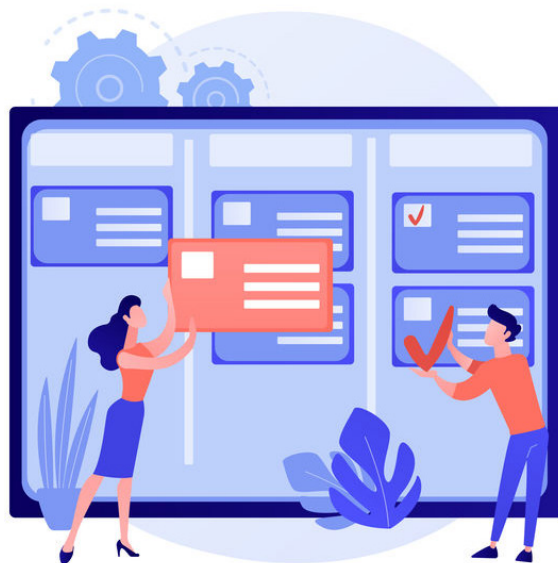
Guest Services

- Collect and review Journey Form with guest.
- Schedule at least ten visits – or in accordance with Doctor or therapist’s recommendation.
- Ask guest their preferred days and times.
- Collect payment – and explain options such as CareCredit for no- and low-interest payment terms.
 - Explain the procedure to change an appointment day and/or time.
 - Address any obstacles to appointment scheduling a final time – transportation, financial, schedule – and offer solutions to those obstacles: TeleHealth, transportation options, Care Credit.
- Express anticipation of seeing them again on their next visit with enthusiasm.



8

Track our Progress Quarterly



- The number of patients that “leak out”
 - Patient Status Report.
 - # of evals compared to # of patients staying for 10 visits
- The patients that don’t have visits scheduled
 - Active Cases by Clinic by Therapist.
 - Tracks patients before they leak out, not after (No activity list).
- Stop tracking “white space” on schedule
 - Too narrow of a range
 - Leads to unnecessary stress and anxiety

APPENDIX A:

The Ultimate Initial Phone Call

Objective

To build a relationship with the patient and get them excited to begin their journey of recovery

1

Make a Connection

- If your friend told you they were having shoulder pain, what would you say?
- Focus on their problems, not your problems
 - **Our problems:** Getting insurance info, scheduling quickly, moving on to next patient
 - **Their problems:** Finding the right solution to their pain
- Ask questions. Personal life and their condition. Get to know them. What questions would you ask your friend?
 - “What’s going on with your shoulder? What happened?”
 - “Has it stopped you from doing anything?”
 - “Have you tried any other treatments?”
 - Etc....

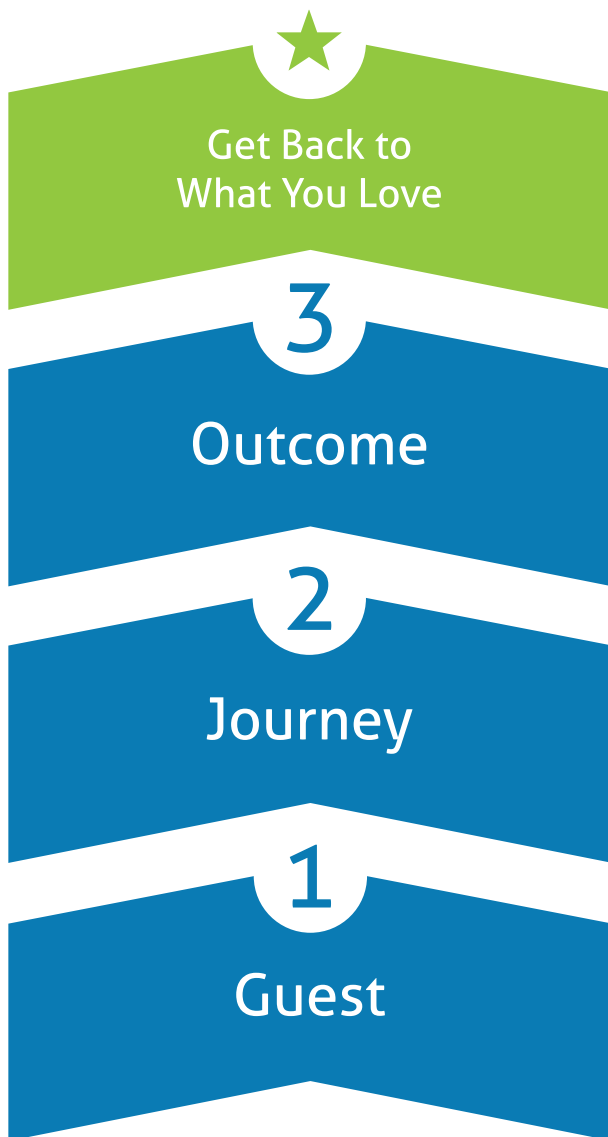
2 Offer Information

- Explain how the first session will go, what should they expect.
 - Who will they see?
 - What should they wear?
 - What will the treatment be like?
- Offer to text or email additional information
 - i. Refer to Information Database
 - Ex: “Suzanne just made a great video on shoulder pain that I think you’ll love. Can I send it to you?”

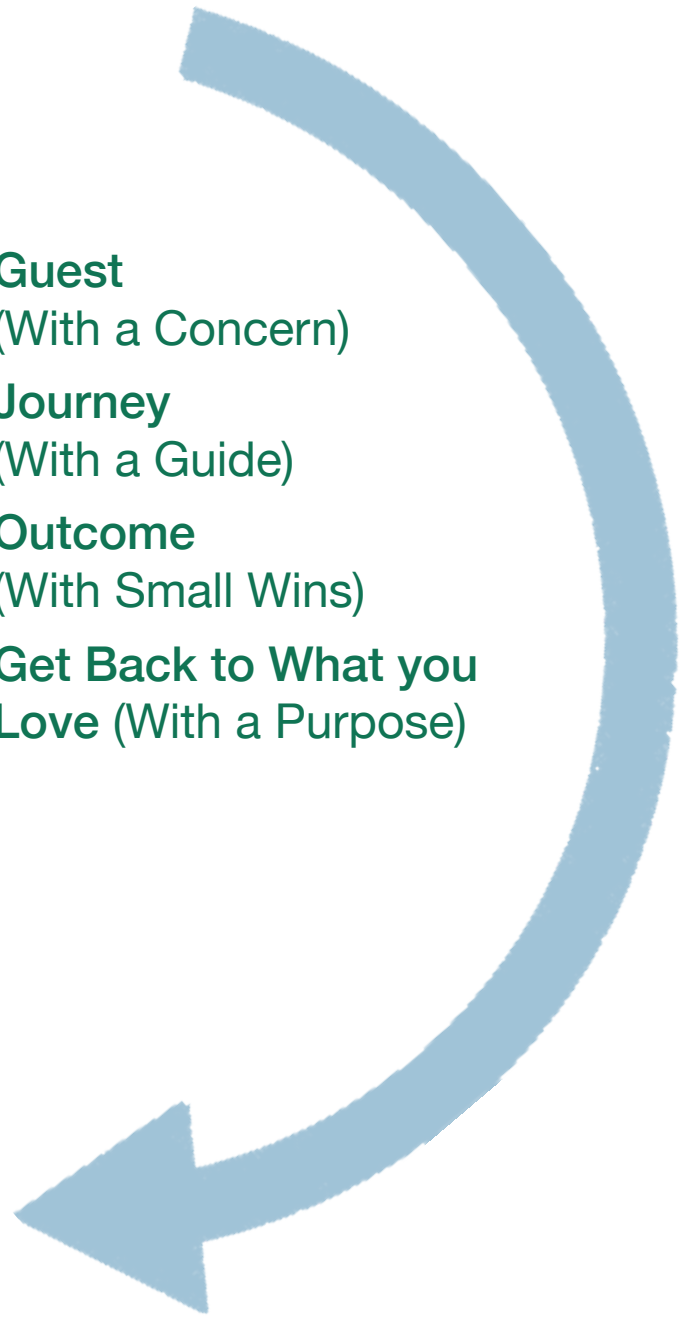
3 Get the Commitment

- Get them excited to come to their first session
- Build up the therapist they’ll be seeing.
 - “Suzanne is great with shoulders. She
 - “You sound like the perfect candidate for Allied. Just the other day we had a patient that had that same problem and now they are playing Tennis.”
- Schedule the appointment

APPENDIX B: The Ultimate Evaluation



- **Guest**
(With a Concern)
- **Journey**
(With a Guide)
- **Outcome**
(With Small Wins)
- **Get Back to What you Love** (With a Purpose)



Guest (With a Concern)

Impairment:

The issue with their physical self:

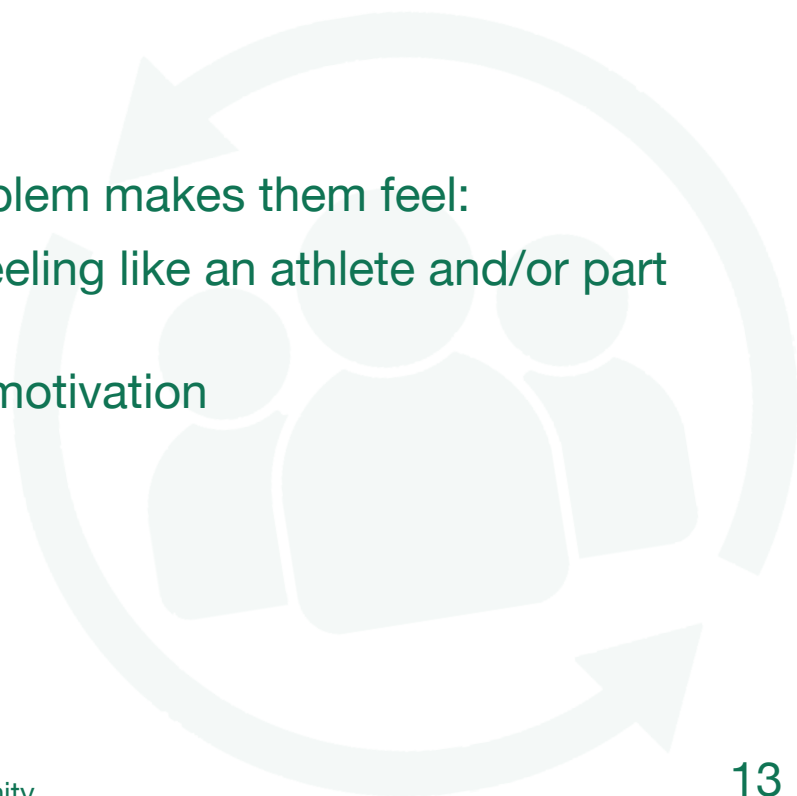
- For example, knee pain
- Low level of motivation

External Concern:

- What that physical problem is preventing them from doing:
 - For example, unable to participate in favorite sport
 - Good level of motivation

Internal Concern:

- How that physical problem makes them feel:
 - For example, not feeling like an athlete and/or part of the team
 - AMAZING level of motivation



Example:

Guest is 42-year-old factory worker with back pain and has been out of work for several months now.

Impairment:

Back Pain

External Concern:

Unable to work

Internal Concern:

Feels less valuable to his family because he is unable to provide for them



So, How Do We Draw This Information Out?

ASK QUESTIONS!



“What activity that you love would you like to get back to doing?”

“What’s the first thing you would do if you had this issue resolved?”

Paradigm Shift:

Our focus (speech, treatment, and actions) should be on the Internal and External Concerns. Not the impairments.

“What benefits do you think will come from this?”



Journey (With a Guide)

The Guest needs to know TWO things:

- 1 That Allied professionals will guide them to where they want to be
- 2 That there is a clear plan of how they're going to get there



Paradigm Shift:

“You sound like a great candidate for our services. We’ve helped many guests just like you get back to”

“What benefits do you think will come from this?”

The Plan

The Direction:

- Treating therapist
- Number of Visits
- What we'll be working on
- Progress Report date
- Check up Appointment


The Explanation:

Explain why you have made these choices

The Recording:

Record info in “The Journey” Sheet

(Located in Eval Folders and each treatment area)



**ALLIED
Physical Therapy**
WELLNESS COMMUNITY
Get back to what you love

Guest Journey Check-Out Card

Patient Name: _____ Insurance: _____

Patient Responsibility: \$ _____ Auth No Auth
co-pay / co-insurance

Step 1 – Evaluation / Progress Report
Meet your guide and get started on your journey.

Evaluating Therapist: Dr. Matt Dr. Susanne Dr. Calvin Dr. Rafael Dr. Melissa

Step 2 – Treatment Plan

Overcoming Objections

Paradigm Shift:

“Can you think of any reason why you wouldn’t be able to complete this plan?”

Overcome objections to help them stay on the journey



It costs too much



I don't have the time

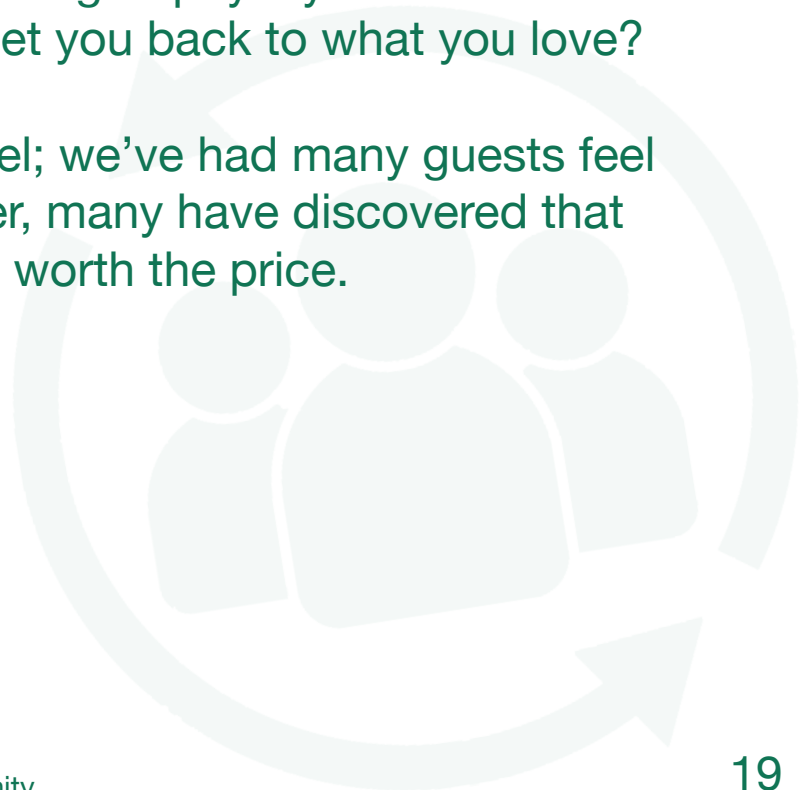


I don't think I'm getting any better

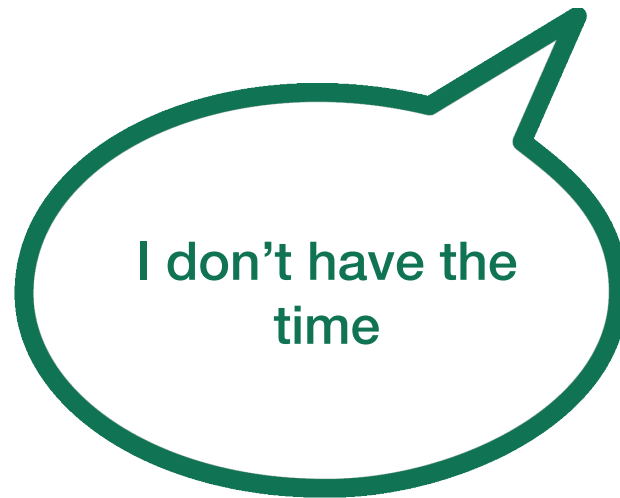
Overcoming Objections



- How much has this injury already cost you?
- What would you be willing to pay if you could guarantee that this will get you back to what you love?
- I understand how you feel; we've had many guests feel that way at first. However, many have discovered that the services we offer are worth the price.




Overcoming Objections



- How much time have you already spent because of this issue?
- How much time would you be willing to spend to resolve this issue for good?
- I understand how you feel; we've had many guests feel that way at first. But many have discovered that they're willing to put aside other things for the sake of their health. Is there any other adjustments we could make to get you back to what you love?

Overcoming Objections



I don't think I'm
getting any better

- Is there any activity that you can perform easier or better since you began therapy?
- I understand how that can be frustrating. There are times when progress isn't as quick as we would like, and sometimes we have to make adjustments to the plan. However, many of our guests discover that they are able to achieve their goals as long as they stay on course.

Outcome (With Small Wins)



out·come

[out,kəm] NOUN

The way a thing turns out; a consequence. Outcomes are like mile markers showing that we're making progress and going in the right direction

- Pain is only an impairment and reduced pain is NOT the goal
- Reduced pain is simply the result of changing habits and small wins
- Our speech, treatment, and actions should reflect this

Paradigm Shift:

■ “What activity have you improved in recently?”

Focus on activity instead of pain.

Asking a guest about their level of pain, or if they’re “feeling better” focuses the guest’s attention to pain relief as a measure of their progress.

Asking instead about their real-world experience with active improvements in their day-to-day lives makes treatment activity-focused.



Outcome (With Small Wins)

What are some small wins that show the patient is progressing?

- Habit of “Brushing your muscles” daily
- Using lumbar roll to improve posture
- Using proper body mechanics for lifting
- Getting out of bed with proper form
- Talking a short walk in the evening
- Being able to walk up and down stairs

These small wins should be recorded in “goals” section of patient note

Get Back to What You Love

The Ultimate Goal



Have the guest physically record what they want to get back to doing on the “Get Back to What you Love” sheet. (Located in Eval Folder).

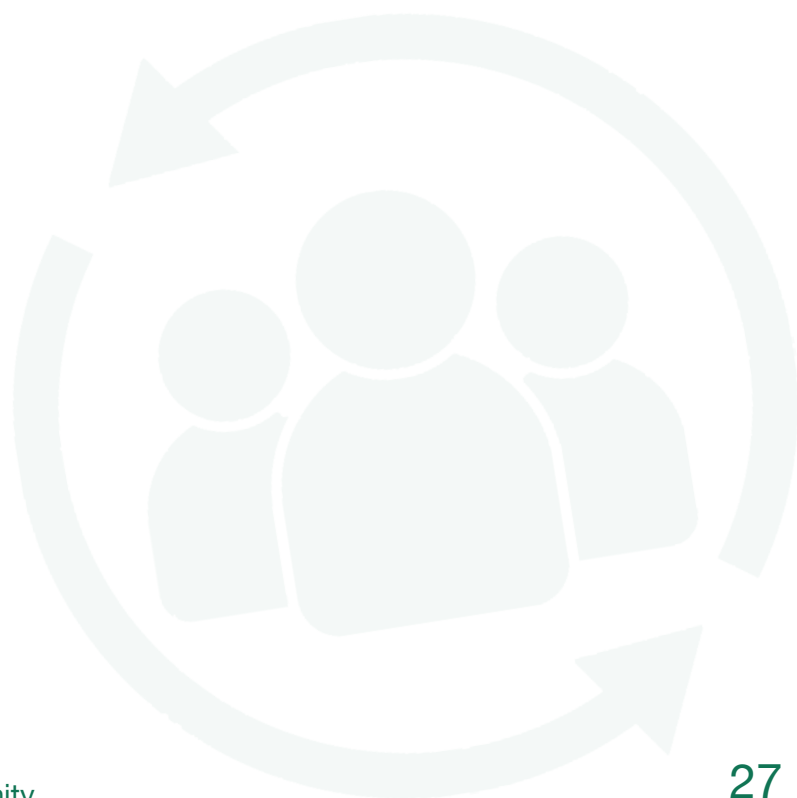


Recap

- Ask questions to draw out the Guest's real concerns.
- “What activity that you love would you like to get back to doing?”
- “What's the first thing you would do if you had this issue resolved?”
- Focus on the external and internal concerns – not the impairments.
- Show we're the guide on the Journey; our plan will solve their concerns.
- “You're a great candidate for our services. We've helped many guests with your concerns.”
- Create a clear plan that will get them to their goal.
- “Can you think of any reason why you wouldn't be able to complete this plan?”
- Overcome the objections.
- Set “Small Win” Outcomes that show the guest is progressing.
- **Focus on the ultimate goal: Get Back to What You Love!**

Use the Eval Folder

1. **“The Journey”** - Detail out the plan that the guest needs to follow. Used at Evals or when making adjustments to plan (Progress Report or DC)
2. **“Get Back to What You Love”** - Explain guiding image. Have the guest write down what they want to get back to doing
3. **Discovery Session Card** - Instruct guest to give this to a friend or family member that they think will benefit from therapy
4. **HEP** - Added in once created



Eval Script Example

“I know you’ve come to us to help resolve your shoulder pain. Let me ask though, what is the first thing you’re going to do once you have this issue resolved?”

(Allow Response)

“Would you mind recording that down in this section?”

(Give “Get Back to What You Love Sheet” in Eval Folder)

“Okay, let me examine you and see what’s going on and preventing you from playing tennis.”

(Perform Examination)

“Mrs. Jones, based on my examination, you have tendonitis of your rotator cuff. What this means is that your tendon is inflamed and irritated. You are a perfect candidate for what we offer at Allied. We can resolve this issue and help you get back to playing tennis. We see this every day in the clinic and we’ve helped many people get back to playing tennis.”

(Use “The Journey” Sheet in Eval Folder)

“Based on what I’m seeing, I’m going to recommend that you come for 12 visits, 3x per week for 4 weeks. I’d like you to be with Cesar or myself depending on how our schedules fit together. We’ll be working on improving your shoulder posture and quality of your tennis serve. We’ll be assessing your progress on the 10th visit and make adjustments to this plan if we need to. After that, I’d like to see you again in 6 months for a check up to make sure you’re still improving. Can you think of any reason why you wouldn’t be able to follow this plan?”

(Allow for Response)

“What if we adjusted to 2x per week for 6 weeks? I can’t promise that you’ll get back to playing tennis as quickly, but we can make it work. Is there any other reason why you wouldn’t be able to follow this plan?”

(Allow for Response)

“Great! Here’s some exercises I would like you to work on until we see you again next time. *(Give HEP)* Next session, we’ll focus on some manual treatment and exercises that will help you play tennis again.”

(Give Folder)

“You’ll also find a card good for a free discovery session. Please give that to a friend or family member that you think will benefit from our services.”



Guest Journey Check-Out Card

Patient Name: _____ Insurance: _____

Patient Responsibility: \$ _____ Auth No Auth
co-pay / co-insurance

Step 1 – Evaluation / Progress Report

Meet your guide and get started on your journey.

Evaluating Therapist: Dr. Matt Dr. Susanne Dr. Calvin Dr. Rafael Dr. Melissa

Step 2 – Treatment Plan

Here's the plan to get you back to what you love:

Frequency per Week:	1x	2x	3x	4x	5x		
Number of Weeks:	1	2	4	6	8	10	12

Products recommended: _____

Team of Therapist you will be working with

Dr. Matt	Dr. Susanne	Dr. Calvin	Dr. Rafael	Dr. Melissa
	Cesar, PTA	Ben, PTA	Nataliya, PTA	Elizabeth, PTA

What we'll work on: _____

What results to expect: _____

Step 3 – Wellness

Wellness services recommended: _____

Patient Name: _____

Treating Therapist: _____

- Room Prep:**
- Laundry
 - Products to Sell
 - Therapy Tools

- Info for Doctor:**
- BP _____
 - Chief Complaint: _____

Pre-Treatment Instructions:

- Bike
- Pulleys
- Heat
- Other _____

Post-Treatment Instructions:

- Recommended Products with Instruction / Square Transaction

- Exercises _____
- E-stim Parameters and Pad Placement

Modalities

- Heat
- Ice
- Other _____

Escort Guest to Check-Out (time out _____)

