



# CLIENT USER EXPERIENCE CHECKLIST

STRATEGIC ALIGNMENT

WEBSITE OPTIMISATION CHECKLIST	
<b>Navigation and user experience</b>	
Booking button is visible within 3 seconds of landing on your homepage	
"Book Now" appears in your main navigation menu (not buried in submenus)	
Mobile-friendly booking process - test on your phone right now	
Contact information is clearly displayed on every page (header/footer)	
Services and pricing are easy to find - no more than 2 clicks from homepage	
About page builds trust with credentials, photos, and client testimonials	
<b>Booking Page essentials</b>	
Direct link to online booking from homepage, services page, and contact page	
Clear service descriptions so clients know exactly what they're booking	
Pricing displayed upfront - no surprises or "contact for pricing"	
Available appointment times show in real-time (no outdated calendars)	
Simple booking form - only essential information required	

ONLINE BOOKING SYSTEM SETUP	
<b>Automated booking process</b>	
Clients can book online without creating an account (reduce friction)	
Instant booking confirmation sent automatically via email	
Calendar integration so appointments appear in your schedule immediately	
Automated waitlist for fully booked time slots	
Booking reminders sent at the cancellation policy cut off before appointment	
Associated clinical note template autopopulate into client file upon booking	
Medicare GP letters associate with CDMP/EPC/MHCP autopopulate to file	
<b>Automated Form Delivery</b>	
Intake forms sent automatically upon booking confirmation	
Forms are mobile-friendly and easy to complete	
Deadline for form completion clearly communicated (24 hours before appt)	
Automatic notification of completed forms	
Forms integrate directly into your practice management system	

AUTOMATED COMMUNICATION SEQUENCE	
<b>Booking Confirmation (Immediate)</b>	
Confirmation email with appointment details, location, and what to expect	
Intake forms link included with clear deadline	
Cancellation policy clearly stated	
Consent form clearly presented	
Preparation instructions (what to bring, what to wear, etc.)	
<b>Pre-Appointment Reminders</b>	
SMS reminder with appointment details sent aligning with cancellation policy	
Email reminder with location and parking information	
Intake form reminder if not completed	
<b>Post-Appointment Follow-up</b>	
Thank you message sent within 24 hours	
Treatment notes or recommendations (if applicable)	
Next appointment booking link for ongoing care	

PRACTICE MANAGEMENT SYSTEM OPTIMISATION	
<b>Payment Integration</b>	
Automatic online payment processing enabled for bookings where possible	
Invoice with payment link sent immediately after booking (for clients who don't want to give their credit card details)	
Automatic receipts sent to clients	
Automatic rebates processed (where applicable)	
Payment failure notifications sent to both you and client	
<b>Automated systems</b>	
Intake forms populate directly into your system	
Payment records sync with your accounting	
Client communication history is tracked in one place	
Rebooking reminders for clients who haven't scheduled follow-up	
Reactivation campaigns for clients who haven't booked in 3+ months	

CLIENT JOURNEY TESTING	
<b>Monthly System Check</b>	
Test your booking process from start to finish	
Complete intake forms as if you're a new client	
Check all automated emails are sending correctly	
Verify payment processing is working smoothly	
Review client feedback for process improvements	
<b>Key Performance Indicators</b>	
Track booking conversion rate (website visits to appointments)	
Monitor form completion rates	
Measure no-show rates (should decrease with better systems)	
Review client satisfaction with booking experience	

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**Don't Do This: -**

- Require clients to call/email to book appointments
- Send intake forms manually after booking
- Use complicated multi-step booking processes
- Hide your pricing or services information
- Forget to test your system regularly

**Do This Instead: -**

- Make online booking the primary option
- Automate everything possible - it saves you so much time!!
- Keep the process simple and intuitive
- Be transparent about pricing and services
- Regularly test and improve your system

### **You'll know your system is working when:**

- Clients book appointments without contacting you directly
- Intake forms are completed before appointments
- No-show rates decrease significantly
- You spend less time on booking admin
- Client satisfaction with the booking process improves
- Your conversion rate from website visitor to booked client increases

### **NEED HELP IMPLEMENTING THIS?**

If you're feeling overwhelmed by setting up your systems, you're not alone. Many practitioners know what needs to be done but lack the time to implement it effectively.

That's where we can help!

We specialise in setting up these exact systems for allied health and natural health practitioners, so you can focus on what you do best - helping your clients.



Ready to streamline your client journey?

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