

# Patient Experience Mapping Tool

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**Overview:** The purpose of the Patient Experience Mapping Tool is to diagram each step in the patient experience so that cancer program staff can better understand the patient perspective, identify operational problems, and pinpoint opportunities for improvement. This tool provides a step-by-step process for creating the patient experience map. The resulting map can then be compared with the “ideal” patient experience with the ultimate goal of identifying process improvement needs as well as areas requiring staff intervention.

Involving staff from across the cancer program in the mapping process will help to ensure that all perspectives are represented, increase the accuracy of the map, and provide as a foundation for building support for initiatives resulting from the exercise.

**Time required:** Varies, depends on size of cancer program as larger programs will require time for review by staff members who are not on the mapping team

**Materials needed:** Markers, post-it notes, and blank wall space, or whiteboard and flipchart

## Step One: Form a Team

Make a list of stakeholders to invite to the mapping session and issue invitations. You want the team to include representatives from every department or functional area in the cancer program. Smaller cancer programs may want to invite all staff to participate. Ideally, the team would include no more than 15 people in order to keep the group manageable.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

## Step Two: Establish Realistic Goals

In order to ensure that the exercise is ultimately productive, define what you hope to accomplish as a result of the mapping exercise. Goals should be specific and achievable. For example, “Pinpointing the causes of delays in the diagnostic process,” “Understanding current processes for connecting patients to supportive care,” or “Identifying opportunities to improve patient intake.”

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_

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## Step Three: Develop a Case Statement

Draft a case statement explaining the need to conduct the Patient Experience Mapping exercise. While you may want to cite specific issues to be addressed, ensure that your description does not include assumptions about the causality of those problems. Refer to this case statement when inviting people to participate in the exercise.

### Sample Case Statement:

The Patient Experience Mapping exercise will help us to isolate gaps in the care and services we provide to our patients. By identifying discrete steps in the patient experience, we will develop a shared understanding of the processes currently in use across the cancer center, pinpoint process breakdowns, and identify opportunities for improvement.

### Your Case Statement:

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## Step Four: Determine Your Approach

Prior to drafting the Patient Experience Map, determine what approach you will take. There are two options that have been shown to work well:

- **Option #1:** Schedule representatives from all areas of the cancer program to meet for 30 minute intervals over the course of one day. For example, the schedule might be:

9:00 – Breast center manager

9:30 – Medical oncology clinic manager

10:00 – Social worker

10:30 – Radiation therapy manager

etc.

During each 30 minute meeting, ask the representative to describe exactly what happens as patients move through his/her area of the cancer center.

- **Option #2:** Assemble the entire team in a conference room. Ask team members to think through each step in the patient care process, starting with screening all the way through to the end of their care (e.g. survivorship or end-of-life care).

Regardless of which approach you choose, budget four to eight hours to create the initial map.

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## Step Five: Draft the Patient Experience Map

Record each patient touch-point in the order in which it occurs. Use different colors to indicate decision points or “triggers” that lead to the next step (e.g. treatment decision, referral) and potential problems in the process.

If there are questions about what actually happens, make a note of them. At the end of the meeting(s), review the list of questions and assign individual team members to find answers and report back.

See page 5 for a sample Patient Experience Map.

## Step Six: Map Verification

In order to improve the accuracy of the map, invite staff and physicians throughout the cancer program to review it and suggest changes. You may want to post the map in a common area (e.g. conference room) or create an electronic version that can be circulated to all stakeholders. Ask people to submit their edits and additions in writing.

## Step Seven: Revise the Map

Revise the Patient Experience Map based on feedback from stakeholders. In addition, incorporate findings from the investigations conducted in response to questions arising from the initial mapping exercise.

## Step Eight: Create “Ideal” Process Map

Reassemble the original Patient Experience Mapping team. Follow the same process as before, but this time capture what would ideally happen as patients move across the care continuum. Keep in mind resource constraints and other practical limitations so that the resulting map reflects a process that could actually be implemented.

## Step Nine: Compare Current and Ideal Maps

Once the map of the “ideal” patient experience is complete, compare it to the original map of what actually happens. Make a list of differences between the two.

### Differences Between the Actual and Ideal Patient Experience Maps:

- \_\_\_\_\_  
\_\_\_\_\_
- \_\_\_\_\_  
\_\_\_\_\_
- \_\_\_\_\_  
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- \_\_\_\_\_  
\_\_\_\_\_
- \_\_\_\_\_  
\_\_\_\_\_

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Now, rewrite the list of differences according to order of priority.

## Your Goals:

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_

The above list can serve as the starting point for process improvement initiatives and inform staff members' job functions and responsibilities.

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Excerpt from Lehigh Valley Patient Experience Map

