

## MARKETING FOR PRACTICE OWNERS | TIPS & INFO SHEET

### DIRECTIONS

Use this guide to help you improve your marketing activities as an owner.

### ESSENTIAL BASICS

Practice owners can lead in the area of marketing by:

- Defining the expectation in terms of functions and results for the practice.
- Naming responsible parties for the activity and results.
- Insisting upon the use of a marketing calendar the owner(s) can review periodically to ensure marketing efforts are adequate and aligned with the needs of the practice.
- Scheduling and maintaining frequent marketing meetings with the office manager and any staff working on marketing functions or projects, to keep the subject in play routinely and moving forward.
- Allocating satisfactory time for participating staff to dedicate to marketing activities.
- Implementing a tracking system so all concerned can easily see how much marketing is being done at any given time and how new patient flow is impacted over time.
- Allotting time and attention to executive oversight of the activity on a routine and dependable basis (weekly marketing meeting, time built into staff meetings for the subject of marketing, etc.)
- Compensating management and other personnel who carry out marketing functions that result in increased new patient flow through bonuses, games and other incentives.

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**TIPS AND INFO:**

The most viable practices engage in a variety of marketing activities. While it is important to scrutinize the financial aspect of each marketing action (for return on investment), that is rarely evaluated correctly by the average doctor not trained in marketing. It is actually equally or more important to execute a marketing plan based on the volume of communication and outreach, not just the specific details of one type of activity while expecting that one activity to attract and retain all the new patients a practice needs to be viable. Budgeting for, routinely funding and creating a marketing environment inclusive of a high volume and wide range of marketing actions is the most reliable way to grow and maintain a viable practice.

The best health index for a general practice is the number of active patients. Depending on the practice, “active” can be defined as a patient having received maintenance or restorative treatment within the last 18 months. Accurately tracking the number of active patients will show if the practice is declining, maintaining or growing. Comparing the number to the same month the year before naturally adjusts for anomalies such as seasonal declines and temporarily inflated income due to completing bigger cases occasionally.

In the United States, practices lose about 8-10% of their patient base annually through normal attrition. It's just a fact of life that people die, move and leave practices for a number of reasons. New patient flow must replace that attrition just for the practice to remain stagnant. Targeting and executing campaigns for adequate new patient volume well beyond attrition replacement is necessary to bring about actual practice growth.

For a general dental office, the marketing budget should run about 2-4% of practice income. Internal marketing (your referral program) should be the first priority, but it comprises the lesser expense (less than 1% of practice income, even considering patient appreciation and staff compensation). Internal marketing is less expensive in cash outlay but requires a more and consistent doctor and staff effort in terms of interaction with existing patients and other affiliates. However, it attracts higher quality patients, as those who have been referred, have a more positive outlook on the practice and the need for following through with treatment. The remaining 1-3% of practice income allocated to the marketing budget should be spent on things like (but not limited to):

- Welcoming appearance of the practice
- Cleanliness of the office
- Neat uniforms for the staff
- On and off-site signage for the office
- Flyers and promotion to attract new patients
- Print ads (in bulletins, magazines, newspapers, etc.)
- Branding (logo and image consistency)
- Website
- E-listings (online directory listings, the equivalent of print or online Yellow Page listings)
- Search engine optimization
- A campaign to garner positive online reviews

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- Social media
  - Patient surveys
  - Patient appreciation events, as well as gifts and discounts for referrals, loyalty, etc.
  - Affiliate maintenance:** If you participate in partner groups, discount plans or affiliate with other businesses, clubs or programs, ensure your information appears in listings and as part of other outreach efforts so participants know about the benefits of your participation and they can find you easily.
  - Broad exposure:** Participate in “best of” campaigns so patients and others can vote for your office to be considered as one of the top practices in the area, as determined by peer or public review. Feedback is usually gathered by a magazine and results are published within the community. You can also ask local newspapers or regional online media to do an article about the doctor, something new or special about your office or your participation in or sponsorship of local events.
  - Youth outreach:** Connect with an elementary school near your office. Offer to let classes come tour the office. When they’re visiting, hand out a small bag with a toothbrush, toothpaste, and other sample items. You can include an offer for a free exam or fluoride treatment for the child or a discount for the child’s whole family. Or you can accomplish something similar by visiting classrooms to conduct presentations. You can also provide moldable mouth guards for sports teams (football, soccer, hockey, and basketball) and deliver them in bags with samples and discount offers to youth sports leagues or offer to attend registration events and hand them out yourself.
  - Public education:** The doctor can write a column for a local newspaper or community publication making information available that the public would find interesting and helpful (not overly technical) along with health and nutrition tips and an offer to answer dental questions or provide a free exam in your office. This is a great place to show before and after photos or use patient testimonials to address dental issues in a way the general public can relate to.
  - Intake:** Many people only think of patient intake as it relates to a new or existing patient arriving at the front desk and being asked to complete forms at the time of an appointment. It’s important to understand that intake actually begins at the time of the first call from a non-patient inquiring about your office and services. Have one or two team members who are trained to receive and handle these calls available at all times. Do not let the call go to voicemail or go unanswered during business hours and answer a ringing phone quickly. If you have to put someone on hold, ask permission and make the wait as short as possible. These trained team members “smile on the phone” and show caring interest throughout the conversation. Spend some time noting common questions and concerns posed in such calls and develop answers for each. Answers should be directed toward getting the patient to come into the office. Don’t neglect to provide answers or let the conversation turn toward dodging and insincerity, but make every effort to let the patient know there are many things you won’t be able to provide full information about until you have a chance to see the person and understand the situation fully. To keep things on track, offer a free exam, so the patient feels comfortable coming in to meet the doctor and ask questions and receive information with no cost or obligation.
  - Family members:** When doing intake with new or existing patients, or when checking out existing patients, it’s important to remember they may be the key to easily making other
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appointments for their children, spouses, parents or other family members. You often have insurance information that details who and what is covered and can ask if they need help making the most of their benefits for everyone covered by the policy (then explain that cleanings often have no out-of-pocket expense). Sometimes just asking if they need appointments for anyone else generates big changes in recall and referrals of family members.

•**Call to action:** Develop an offer you can make to a potential patient to get him or her to continue with the next step. This can be a free exam to get an initial appointment made or a discount on a first service if it is started within a certain amount of time. You can use this offer on phone calls, in person, in your print ads, on referral cards, on your website, and on signage to help a patient keep moving forward toward optimal health.

•**Specialty services:** Perhaps you offer specialty services in your practice, such as endodontics, orthodontics, periodontics, prosthodontics, pathology, surgery, implants, sleep apnea and the like. If so, develop the materials and connections with related specialists and other practitioners to manage the activity, keep it working within the practice environment and promote it to the public and other practices.

•**Newsletters:** Quarterly or bi-annually send a newsletter to existing patients or those you saw once but don't necessarily anticipate seeing again immediately (perhaps an emergency patient that didn't schedule for a cleaning or other treatment). Keep it short and share community news, interesting facts in your field and promote health maintenance, the importance of completing needed treatment and the idea of referring others to your practice.

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