

How to Implement a Referral Program

Use the following guidance to create a referral program for your practice.

Get Your Team On Board

Have a meeting with your team to inform them that the practice is starting to address its marketing techniques. Marketing can be a misunderstood and emotional subject for many people, including some of your team members. We have all had various experiences with marketing as consumers and as members of other practices, and these experiences could give some a negative opinion about marketing in general. It's important to try to offset any negative feelings they may have through open communication so your staff is reassured, comfortable, and engaged.

Also make your team aware of the fact that the average practice loses 8-10% of their patients every year from natural attrition (due to a move, change of insurance, death, etc.). Explain that in order to stay in operation, the practice must, at a minimum, replace these lost patients. In order to grow, the practice must attract even more new patients, and new patients are gained through marketing. Giving your team this information to show the importance and value of marketing will go a long way in gaining their acceptance, trust, and participation.

There are two important steps for implementation of a successful referral program:

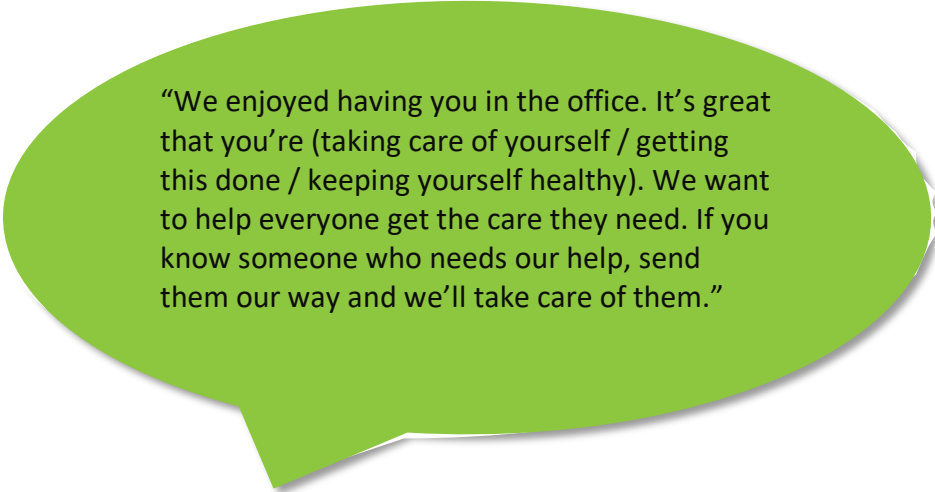
- You must develop a short, genuine, and comfortable way to talk about the purpose of your practice and who you help as the most important part of your referral dialog—otherwise, your team won't feel comfortable talking about the referral program with patients. For training purposes, it is important to help your team understand that a referral program will only be effective if the team members are communicating correctly and routinely with patients about it.
- Use referral cards to enhance the dialogue and serve as a reminder and motivator for patients to follow through and make a referral. With referral cards, the more you get out, the higher your odds will be for success, so your team must work together to effectively get as many cards out to patients as possible. The more conversations you have with your patients about referrals, the more conversations they will have with others and, ultimately, the more new patients you will receive.

What to Say: the Referral Dialog

Here are some key points to include in your dialog:

- Start by telling the patient you enjoyed having them in the office. If someone is thanking you or expressing satisfaction, you can acknowledge what's being said and easily move the conversation over to your appreciation for them coming in (state it with the focus of the patient and the care and away from the team members or practice). If you want to initiate the conversation on referrals, this is a great way to easily and naturally bring it up. It's a use of good manners that patients don't hear often enough, and they respond well to this approach.
- Tell the patient how important it is and what a good job they have done by taking care of this. Though you may see these procedures as routine, to your patients they may seem unnecessary, costly, intimidating, etc.
- State the purpose of the practice, letting the patient know you want to help them and others get the care they need.
- Suggest that the customer send in others they know who are having similar problems or who need other dental help.

Here is an example referral dialog:



"We enjoyed having you in the office. It's great that you're (taking care of yourself / getting this done / keeping yourself healthy). We want to help everyone get the care they need. If you know someone who needs our help, send them our way and we'll take care of them."

Hand the cards out as you use the dialogue. It helps if the card includes an offer for a free exam or service. This helps demonstrate the idea that you want to help.

Have the Conversation at the Right Time

The best time to provide a patient with a referral card is when they are expressing satisfaction with the practice or a service. They could be pleased with the location, appointment availability, that you take their insurance, your caring approach, the functional or aesthetic outcome of their treatment—whatever it is, they might be willing to share this positive experience with others.

To lead the conversation into referrals, you will use your referral dialog and encourage them to let others know about the care and help your practice has to offer. It takes time to build the habit to respond reflexively with your referral dialog as soon as you hear a patient express satisfaction, but it will become natural with time.

You can also use your referral cards as a reminder system for your staff. The cards can be attached to charts, routing slips, toothbrushes, literature, and other items to prompt each team member to initiate a conversation about referrals. If the cards are attached to the slip and the patient is seen by three team members, one might have a moment before the doctor enters the room to discuss referrals. If a team member does talk with the patient about referrals and gives them the card, ensure they know to leave the paperclip on the slip so the other team members are aware that they've already discussed referrals with the patient.

It's important that the doctors lead by example for referrals. If a patient is thanking the doctor and expressing satisfaction, the doctor should take the card off the slip, use the dialogue, and give the card to the patient. Two cards per slip should be adequate. If a patient asks for more cards, provide them!

Patients receiving a hygiene should be given a referral card during each appointment as they are usually seen once every 3-6+ months. Restorative patients should all get cards as well, but if they are running through a course of treatment that requires them to be in the office more frequently (for instance, once per week for four weeks), then choose one appointment to use the cards (perhaps when the patient is out of pain or seeing the culmination of a cosmetic process).

For at least the first month, someone who is trained on the referral program and process should be responsible for putting cards on patient slips. Once the procedure is fine-tuned, it can be passed over to a receptionist or other team member as desired.

Showing appreciation for patients who refer others is important. Send them a card to express your gratitude and note who they referred on their charts so you can personally and verbally thank them for the referral when they are next in the office. Consider a gift card, movie tickets, or account credits as a token of appreciation for the referral.

Staff Referrals

Staff referrals can be another overlooked source to bring in a large number of new patients.

Be sure to regularly inform your staff of meaningful patient successes so they understand the value of the dental treatments you offer to help them become advocates for dental treatment at your facility. This will also help them give better referrals with more specific information.

Have a staff meeting to talk with your team about referring their friends, family, and other people they know and meet to the practice. Mention that you'll offer their friends and family members a service discount or a new patient discount for anyone else.

You can also motivate your team to give referrals by providing incentives like a small bonus or gift for each patient they personally bring into the office. You can also create games and competitions to reach a certain number of staff referrals (make the target number of referrals low to start) and offer rewards like time off or a fun team outing.