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PR Marketing Coordinator for General Practices   
Procedure Guide

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# INTRODUCTION

This guide is a tool to demonstrate the specifics for your position and the procedures for operation. It breaks down each component of the PR marketing coordinator position and the expectations for performance. For detailed patient scenario scripting examples, please refer to ePractice Manager’s online document library on your company’s portal.

# PART 1: KPIs

Key performance indicators (KPIs) are statistics that measure the performance in achieving key objectives, such as general office and job-specific productivity.

All successful businesses use KPIs to monitor the areas of their organizations. Without KPIs, a business is running blind. Running without monitoring the appropriate KPIs is equally as bad. Without KPIs, you and the business must make assumptions and guesses rather than depend on factual statistics. This can result in ineffective management and a lack of expansion for the practice, as well as upsets between management and staff.

## Your KPIs

You should have a set of specific KPIs for your role within the practice. If you do not, meet with your office manager to determine which metrics would be most appropriate to track productivity for your position. Your KPIs should be minimally tracked on a monthly basis, but ideally on a weekly basis.

## Effectively Using KPIs

To use KPIs effectively,

* ensure that the KPIs you use truly and accurately measure your role’s productivity
* regularly post the metrics to trackers, including graphs if applicable
* regularly evaluate the trackers/graphs to see what trends are emerging

For example, if you see a significant increase from one week or month to the next, examine what actions were implemented prior to the increase. Find out what the successful actions were, and make sure you continue them.

Similarly, if you see a meaningful decrease in a trend, you must take effective action to halt the decline. Look into any significant changes in your job duties and/or actions that may have occurred in the weeks leading up to the drop. Did you stop doing something or neglect anything that was working? Were additional job duties given to you that led to neglect of successful activities?

The point in either case is to use your graphs to observe what is going on, and then take the appropriate action.

# PART 2: BASICS OF PR, ADVERTISING, AND MARKETING

The PR Marketing Coordinator (PRMC) must know the definitions and basic concepts of the three key areas: public relations, advertising, and marketing.

## Public Relations (PR)

*Advertising is saying you’re good. PR is getting someone else to say you’re good.*

Public relations (PR) is the practice of managing the spread of information between an individual or organization and the general public. In other words, PR contains the actions you will take to create and build relationships between your practice, existing patients, and potential patients. This helps “soften up” the various market segments you deal with (such as referring GPs, existing patients, and the general public) and will increase the credibility, recognition, and perception of your practice.

PR is a long-term strategy, not just a single action. It is the building of a brand and both the awareness and recognition for your practice.

### Examples of PR activities

* Taking referring patients to lunch or giving them movie tickets or other small gifts
* Participating in study groups
* Giving thank-you notes to referring patients
* Sending mailings to the database that promotes patient successes
* Posting patient testimonials around the office
* Sending birthday cards to patients
* Being an active, participating member of local business groups such as the Chamber of Commerce, Rotary, etc.
* Being the team dentist for local high school athletic teams
* Giving educational talks to local schools, businesses, groups, etc.

## Advertising

Advertising is the act of calling public attention to your product or service and attempting to persuade people to take part in it.

Some common advertising examples include paid announcements in newspapers, magazines, or on the radio, television, billboards, and social media sites. Healthcare advertising also often includes educational brochures about the services an office delivers, hand-outs on the practice and services, and print ads in local neighborhood newspapers.

Planning, designing, and writing advertisements can be done by a professional advertiser or someone internally who is trained on the subject. No matter what type of ad you are creating, it must promote the product or service and include a call to action, which is the piece of the ad that provokes the audience to act now.

### Examples of calls to action:

* "Join today for a free 7-day trial."
* "Call us today and schedule a free consultation."
* "If you schedule your appointment for July or August, you will receive..."

### Types of Ads

Upwork is an excellent site that has a great deal of educational information on advertising. Review the [Advertising Explained](https://www.upwork.com/hiring/marketing/what-is-advertising/) article in the Marketing section of Upwork to learn more.

According to Upwork, there are three basic types of ads:

* **Informative Advertising**: Often used to launch a new product or to reach a new group of customers. It gives people basic information like what a product does, how someone might use it, where they can find it, and what the price point is. The objective of informative advertising is to capture interest, raise awareness, leave a positive impression, and motivate people to take the next step, like making a purchase or requesting more information.
* **Persuasive Advertising:** Generally aims to increase demand, influence people to change brands, or motivate people to make a purchase. Persuasive advertising might show the benefits a product offers or compare key features against a leading competitor.
* **Reminder Advertising:** Reassures people who already know and like a particular brand. The goal is to keep the product or service at the forefront of consumers’ mind for future purchases. It reinforces messages from other ads and may include customer testimonials.

Advertising is a form of outbound media, which means an ad interrupts what someone is doing in an effort to get their attention. As the PRMC, your job is to create ads that attract attention to your office’s services and products.

## Marketing

Marketing is the process of preparing your product for presentation to the public. This includes all of the research and preparation that is done to present the product in a desirable way. Even in the same profession, marketing needs vary geographically and from one community to another. This is why market research is so important.

Marketing involves the creation of an overall strategy, specific plans for promoting and advertising the product or service, and all the PR activities associated with it. When done correctly, marketing stimulates a desire for your product or service.

### Marketing Strategy Examples

* A patient referral campaign
* Social media marketing campaign
* Search engine optimization (SEO) to increase search rankings for your office
* Reactivation of inactive patients campaign
* Database mailings

### Implementing Marketing Strategies

Do your homework through formal and informal surveys, study key performance indicator (KPI) trends, listen to your patients and referral sources, track and tabulate responses to all marketing efforts (e.g., recall, reactivation and referral programs, external ads & mailings, etc.), and then formulate and adopt marketing strategies and implement them. Watch what does and doesn’t work, then revise and improve as you go.

Ensure that each and every activity and all the steps required to pull them off are on your marketing calendar.

# PART 3: SURVEYS AND TESTIMONIALS

Patient feedback is the most important to produce effective marketing, PR, advertisements, and promotions for your practice. How do your patients feel about all aspects of your practice? What do your referring patients and professionals think about your office and how you take care of their family, friends, and business associates? Knowing how to use surveys and testimonials to properly collect this type of feedback is an essential tool for a PRMC.

Marketing dollars can either be highly effective or useless depending upon your knowledge of the different marketing segments you deal with. Understanding marketing segments is accomplished through the proactive collection of feedback.

## Surveys

Through the use of surveys, you will be able to determine the "hot buttons" to include in your marketing material. A **hot button** motivates or triggers an emotional response in a prospective buyer. It can be an emotional tug or a statement that has an impact on your target audience. Here are some examples of hot buttons:

* "No over-scheduling, no wait time"
* "We offer IV Sedation in a calm and relaxing environment"
* "Convenient location"
* “Friendly staff”
* “State of the art technology”

### Basic Survey Process[[1]](#footnote-1)

When doing a survey, it is always best to ask the questions face-to-face. However, sometimes paper or online surveys will need to be used. The process consists of three easy steps:

1. Ask the questions and note down each answer.
2. Tally up the answers that recur on multiple surveys. For example:
   * Seven out of ten patients were impressed with how quickly they got in to see the doctor on their patient exit survey. (This data can also be used on promotional and advertising pieces.)
   * 75% of new patients came from the referral program with your new referral card handout instituted two months ago. (In this case, you would continue this program and determine how it could be improved.)
3. Incorporate the recurring answers (i.e., hot buttons) into promotions with referral sources and advertising for the practice.

## Testimonials

A book of before and after photos with accompanying testimonials should always be kept up front with the receptionist. This type of book is called a "Brag Book." Instead of simply leaving this in the waiting area, the receptionist should hand this to new patients while they are waiting to see the doctor on their first visit.

It is your job as the PRMC to ensure that the book is up-to-date and filled with positive testimonials.

### Getting Testimonials

All patients should fill out an exit survey upon completion of their treatment. The survey should have a box that can be checked if the patient gives their permission for the practice to use their survey in promotional efforts. These exit surveys will allow you to create testimonials and marketing pieces for the practice.

**IMPORTANT: Testimonials must have the patient’s approval before use for marketing purposes or it is a HIPAA violation.**

Here are some important points to keep in mind:

* Meet with as many patients as possible who are completing treatment.
* Patients should be handed a nicely prepared form titled with something like, “My Experience with Dr. Jones’ Office.”
* Patients should be approached at any point where they appear to be happy, satisfied, appreciative, and upbeat about their visit.
* When patients are given the form, they should be asked to fill it out while they are in the office. This is the most successful way to get patient testimonials.
* If the patient is not able to complete the form in-office, then give it to them along with a self-addressed, stamped envelope and thank them in advance for completing it and dropping it in the mail.
* Always send a copy of the patient's testimonial to anyone who referred the patient with a note thanking them for the referral.
* Do not just tuck the testimonials away in the brag book. Make copies of them for display on boards around the practice so patients can easily see them.

# PART 4: INTERNAL MARKETING—REFERRALS

Internal marketing is by far the most effective marketing type for any practice, in terms of results and cost. Internal marketing captures patients through retention programs and uses your existing patient base to generate new referrals.

Most practices focus on marketing to potential new patients through external marketing and easily forget about the ones that they already have in their databases. According to market research, selling to existing customers is about 50% easier than selling to brand new prospects.

The most cost-effective and productive form of marketing is to reach out to patients who have used your services before, and encourage them to visit you again and/or refer family, friends, and/or business associates to your practice. This is internal marketing, and it can be done by

* having a well-managed and up-to-date patient database
* having an effective recall program in place
* sending regular mailings to the database
* implementing an ongoing referral program

## 

## Referral Programs

**The most powerful source of patient acquisition is word-of-mouth patient referrals.**

Market research has shown that a referred patient is much more likely to accept treatment compared to a patient from other forms of external advertising. Their retention rate is also much higher. The marketing costs to develop effective referral programs are also significantly less than most external marketing activities.

*There is NO marketing that is cost-effective without a powerful internal referral marketing program.* The single most fundamental law in getting referrals is that

***YOU HAVE TO ASK FOR THEM***

Getting referrals is that simple. Always use a customized referral card or pack when asking for and discussing referrals with patients. They can be

* handed out at reception when people come in or are waiting
* handed out by the hygienist after the hygiene appointment is done
* handed out by whomever checks patients out after service
* used for cross referrals between professionals
* given to friends and family members by staff members

Don’t just hand out the card. You need to communicate with the person, establish rapport, and make sure they are a happy, satisfied patient. Then simply ask them if they know of any family, friends, or business acquaintances that could use your services. Ideally, they will think of someone. But even if they don’t, hand them some cards, show them what is on the card, and encourage them to pass them out.

**Only one staff member should ask a patient for a referral at any single visit.**You don’t want a patient to feel overly pressured about it. Coordination at morning huddles can solve who will ask each patient that day.

There are several types of cards and packs on the market that have proven to be successful. Here are a few examples:

* **“Care to Share” cards, created by** [**Wilson Printing USA**](http://wilsonprintingusa.com/dental/care-share-referral-cards/).



* **The “Viva Pack,” from** [**Viva Dental Marketing**](http://www.vivaconcepts.com) contains a clear plastic card and a coin, both of which have an introductory offer to assist new patients in improving their dental health. These have been successful because they are less likely to be thrown away or forgotten about. Below is an example of one of their cards and the slide-out envelope that holds the card.





## Converting Inquiries and Referrals

The PRMC ensures the receptionist (and anyone else who may answer the phones) is excellent at the essential skill of converting potential new patient inquiries into new patient appointments. Without this vital skill, many potential new patients that contact the practice based on marketing efforts, including referrals from your patient base, will not sign up or come in.

This skill can be learned by taking the ePracticeManager **Receptionist & Scheduling Coordinator** training course.

# PART 5: Internal Marketing – Recall

An effective recall program can be the single largest factor in practice growth because it keeps the patients active in your practice. It costs your office significant dollars to acquire new patients, but it doesn’t cost much to keep existing patients active. If you don’t run an effective recall program, you are throwing away your marketing investment costs.

There are as many recall programs as there are practice management software packages, and some are more effective than others. However, there are two key points to ensuring that your recall program works:

1. **Educating the patient on the importance of continuing care.** This must be done at every appointment by the hygienist, chairside assistant, or doctor. You should have an educational piece on the importance of continuing care that can be given to the patient at the end of each appointment. This will help ensure that the patient schedules their next appointment.
2. **Getting the patient *actively involved* with making the next recall appointment.** This cannot be done by simply entering the date of their next appointment into your scheduling system and handing them an appointment card. That is the absolute minimum. *Getting the patient actively participating in making the appointment will greatly increase recall appointment arrivals.*

## Recall Program[[2]](#footnote-2)

Here is a recall program to accomplish educating the patient and getting them actively involved in continuing their care.

1. Have a supply of pre-printed postcards that the patient will complete prior to leaving the office. The back of the card should have the practice logo as well as the text “Your next appointment with our office is:” followed by lines to fill in the date and time of their next appointment. The front of the card should have the practice’s return address in the upper left and room for the patient’s address in the center.
2. Before the patient leaves the office, the receptionist should schedule the next appointment for about 6 months out. If the patient says something like, “I don’t know what I’ll be doing 6 months from now,” simply respond by saying, “Well, this will make it easier for you, as you’ll know at least one thing that you’ll be doing!”
3. If the hygienist has already made the appointment in the exam room, ensure they tell the patient to see the receptionist before leaving to schedule the new appointment date.
4. Ensure the patient's name is in the scheduling software and provide an appointment card with the date and time of the appointment if they don’t already have one from the hygienist.
5. Give the patient one of the pre-printed postcards and get them involved by having them fill in their name and address on the front and the date and time of their next appointment on the back. If they ask why, tell them that the office has discovered that this is the best way for a patient to remember an appointment. Postcards also act as a backup for computer glitches.
6. State that you'll send the postcard out ahead of time as a reminder of the appointment and that you’ll also give them a call a few days before as a final reminder. (Do not say you will call to “confirm” the appointment. That can create a mindset that the appointment is tentative until confirmed.)
7. Divide a file box into sections for each week of the year and file the card in the weekly slot that is two weeks prior to the appointment.
8. At the beginning of each week, pull out the cards for the appointments scheduled two weeks away and mail them.
9. Using your recall confirmation dialogue, call the patients two to five days ahead of time as a final reminder about the appointment.

You'll find that because the patient filled out the card and received it in the mail, you'll have a much easier time confirming and keeping these appointments. This system should be used in addition to the recall system provided by your practice software. The key to the system is that it gets your patient actively involved and participating in the scheduling of their recall appointment, which will greatly reduce cancellations and no-shows.

# PART 6: INTERNAL MARKETING – REACTIVATION

Most practices do not market enough to their database, and they often tend to concentrate on expensive external marketing for new patients. They let patients go inactive and accumulate incomplete treatment plans. Research has shown that as much as 65% of a practice’s patient files have incomplete treatments in them.

While this is an expensive management mistake, it can also be a blessing if a good reactivation program is initiated. There is an enormous amount of potential service in any practice that hasn’t regularly and effectively marketed to its database.

There are two basic avenues to reactivate inactive patients:

* chart audits
* regular mailings to your database

To be effective, both require proper management of your database. This is not complicated, but it is often overlooked as a vital practice management function. Your patient management software should have all the fields needed to create and maintain a useful database.

This database should contain *every single* patient who has ever received services from you, and it must be kept up-to-date. *That means it must have current patient contact information and it must be set up to separate active and inactive patients for marketing purposes.*

## Chart Audits

Auditing your patient charts will help you find treatment that was never done or was not completed. With effective marketing follow-through, this can bring additional production into your practice. This type of audit should be done as soon as possible if it hasn’t occurred in the last 24 months.

### Chart Audit Patient Reactivation Program

All of the following general steps must be followed in sequence for the program to be effective.

1. Get approval from the practice owner to implement the program.
2. Assign a staff member to oversee the project (likely the office manager or PRMC).
3. Write out instructions for any steps that will be assigned to staff.
4. Go over the program at a staff meeting and explain how it will be done. Inform the staff that they are to help on specific steps during any downtime they have, and hand out instructions on what they are to do.
5. Train every staff member on the steps you expect them do during downtime.
6. Determine if your database system has a way for you to list out all of your inactive patients.

* If so, print that list of names.
* If not, go through all patient charts and create a list.

1. Organize the inactive patients list alphabetically or by most recently inactive to oldest inactive.
2. Make a master spreadsheet of all the names, addresses, and phone numbers of the inactive patients. Add cells to include each piece of data you will collect in subsequent steps. Your software may offer this as a feature, which will eliminate the need for a separate spreadsheet.
3. Audit each patient file to determine who fits into the following categories (ensure the spreadsheet has a column for each):

* Overdue for a recall appointment (note the date they were last in)
* Received a treatment plan but has not received any portion of it (note when they received the treatment plan and what it is for)
* Received a treatment plan and has received a portion of it but still have more treatments left (note when they received the treatment plan, when and what portion of treatment was received, and what treatment is left)

1. Print out three lists for each category above.
2. Create a template letter for each category above that communicates the appropriate information to the inactive patient. For example:
   * The last time they were in for a hygiene appointment and the importance of continuing care for their dental health
   * The treatment plan they were presented and why it is important to their health to get it done
   * The incomplete treatment received on their treatment plan and the importance of getting it done
3. Ensure that the letter communicates
   * A caring attitude
   * Education on dental health appropriate to their situation
   * An intention to help them
   * The name of the person to call to make an appointment
4. Follow the letters with calls and get appointments made.

## Database Mailings

Sending regular mailings to your active and inactive patient database will

* drive increased numbers into your practice
* activate inactive patients
* help maintain a successful recall program
* increase the number of active patients while reducing the number of inactive patients in your database

Mailings must be aesthetic, communicate a warm message, have some educational content, and make an offer. Let your patients know that you appreciate their business, and offer a special discount that is only available to current or past patients. This will give them an incentive to contact you.

## Tips to Remember

* Send mailings a minimum of four times per year, plus birthdays. They should ideally be sent every other month.
* Provide a useable offer to help patients complete an undone service or include an offer for an elective service.
* Allow the incentive to be transferable to capture family or friend referrals.
* Personalize your mailings with information you know about the patient to create familiarity and interest.
* Automate your mailers to reduce staff over work.

# PART 7: MARKETING ANALYSIS

To effectively bring in and keep an adequate volume of new patients, you must continually analyze your marketing activities. Analyzing what has and has not worked in your marketing actions is a vital step for effective marketing management. Unless you regularly analyze your past campaigns, you may end up wasting most of your marketing budget.

## Marketing Analysis with Surveys[[3]](#footnote-3)

Using marketing analysis to identify good marketing strategies keeps the practice viable and growing. A key resource needed in any marketing analysis is continual feedback through surveys and regular examination of your KPIs.

**New Patient Surveys:** One of the most important actions for tracking and analyzing your marketing is to continually survey *all new patients* to find out what marketing effort got them into the practice. If you do this long enough (and keep good tabulations), you will easily know which marketing activities work the best to bring in new patients.

**Patient Satisfaction Surveys:** Given on an ongoing basis, patient satisfaction surveys will also give you valuable data to use in marketing, for both new patients and your database. These surveys should be regularly tabulated, with the data used in any marketing analysis.

## Marketing Analysis with KPI Trends

For effective marketing analysis, an important first step is to look closely at your KPI graphs. Observe changes in trends and notice when those changes started significantly going up or down. From that information, analyze what might have caused the change. For a quick refresher, see the KPI section of the Staff Orientation Course and/or Office Manager Course.

## New Patient Marketing Analysis Steps[[4]](#footnote-4)

Use the following step-by-step guide for new patient marketing analysis:

1. Continually survey new patients to find out what brought them into the office, and regularly update your tabulations.
2. Keep metrics on all new patient sources that make up the total new patient KPI, including

* referrals from family
* referrals from friends and acquaintances
* internet responses
* mailer responses
* ads
* other

1. Post these metrics on weekly and/or monthly graphs that accompany your new patient graph.
2. Keep a log of every marketing campaign and include the following information:

* What the campaign consisted of (i.e., family referral campaign, neighborhood mailing, etc.)
* When it was started and (if appropriate) when it ended
* Any information on what the key ingredients were, including a copy of the mailer, a copy of new referral cards handed out, the survey results used in the campaign, etc.

1. Observe the graph of new patient KPIs. Look for any change in the trend such as an observably significant increase or decrease in the metric.
2. Look at the other graphs that show the sources of new patients to see if there is a similar change in trends that parallels the new patient graph. Focus on that activity.
   1. If there is an upward trend change, look for when the change started:
      1. Go through your marketing log and find out what campaign was started a bit before the surge in the metric.
      2. Ensure that the campaign is either kept in place (for example, continuing a successful referral program or SEO activity that increased hits and responses, etc.) or repeated at an appropriate time interval.
      3. Determine what you can do to make that campaign even more effective without changing its basics.
   2. If there is a downward trend change, look for when the change started:
      1. Evaluate the marketing program/campaign that began just before the dropped trend and determine if it should be eliminated or corrected. Follow through with what you find.

Correct any staff involved (including yourself) by determining where a mistake occurred. Then have them re-study and/or newly study any appropriate marketing materials, as well as do drills or role plays, as needed.

1. *Example surveys can be found in the PR & Marketing section of the ePM Document Library.* [↑](#footnote-ref-1)
2. *A copy of this program can be found in the PR & Marketing section of the ePM Document Library.* [↑](#footnote-ref-2)
3. Example surveys can be found in the PR & Marketing section of the ePM Document Library. [↑](#footnote-ref-3)
4. These new patient marketing analysis steps can also be found in the PR & Marketing section of the ePM Document Library. [↑](#footnote-ref-4)