

## Referral Program Implementation

Have a meeting with the team and let them know that the practice is starting to address the subject of marketing. Marketing can be a misunderstood and emotional subject. People have many experiences as consumers and as part of other practices that give them a negative opinion about marketing in general. It's important to offset that with good communication about acceptable topics so staff are reassured and engaged.

Let the team know that the average practice loses patients and referral sources each year due to normal attrition (death, moving, change of insurance, change of circumstance, etc.). Just to keep the practice stable you need to attract enough new flow to replace what is leaving. In a practice that wants to grow, you need to generate new patient flow and new referral sources in excess of that. Giving people a reason for why you're addressing this important topic will go a long way to garner acceptance and participation.

Because the practice wants to take a comprehensive approach to marketing, you'll use a patient referral program as part of your efforts. Many of your patients care about dental health and are highly satisfied with the care they receive in your practice. Take the time to go over patient satisfaction levels, patient survey results, online reviews, etc. In most cases these patients would be happy to tell others about your practice.

National studies show that over half of your public are not getting the level of care they should. That means that they need more care, and your office is a great place to get it! These people aren't seeking your services for a reason. When they decide to (or need to because neglect leads to an emergency) they would rather hear from a trusted colleague, friend or family member about a positive experience. This will make them more comfortable about the reasons that have prevented them from seeking care and make them better patients in your office for all the right reasons, namely their trust and confidence that was instilled by your existing, satisfied patient.

There are two main issues that can become barriers to the implementation of a referral program.

1. We need to develop communication patterns that are short, genuine and comfortable or staff won't speak with patients about this important subject. And communication about the purpose of the office and your interest to help those who need it is the most important part of your referral program. Below you'll find some specific suggestions for referral dialogue. But for training purposes it is important to get across to the team that a referral program will only be effective if the staff are communicating with patients about this correctly and routinely.
2. We will use referral cards to enhance the dialogue and serve as a reminder and motivation for patients to follow through and take the necessary steps to make a referral. It is the use of these cards

in adequate volume that will accelerate your referral program. It's not that the card or the offer is so great that it drives the whole referral program. It's a volume issue. By getting cards out to the

majority of your patients you will have adequate outreach to truly influence the number of conversations your patients have with others and ultimately, to influence your new patient flow.

So how and when will the dialogue and the handing out of cards occur? The very best time is when a patient is expressing satisfaction. They can become pleased about most anything. Sometimes they like the convenience of your location or appointment times. Sometimes they like that you take their insurance. Sometimes they like the caring approach you take. Sometimes they like the functional or aesthetic outcome of their treatment. Whatever the case, it's important to note that satisfaction can come in many shapes and sizes and timeframes, and the patient has become pleased enough about some aspect of the practice experience that s/he is talking about it. At this point, you can respond with the referral dialogue and encourage the person to let others know about the care and help your practice has to offer. It takes some time to build a habit on this subject, where it becomes a reflex to hear patient satisfaction as a cue to bring up the referral program. In the long run, it becomes the preferred timing for this discussion because it is relevant and also keeps the relationship and conversation on topic, and that topic should always be about how you want to help everyone get the care they need.

The next approach has to do with using the cards themselves as your reminder system. They can be attached to something like a routing slip in the office, which prompts each person who handles the slip and interacts with the patient to see if it is a good time to initiate a conversation about referrals. Again, use the suggested dialogue, as it is very short, conservative, comfortable and appropriate, so it should be met with very little resistance by staff and none by patients. If the cards are attached to the slip and the patient is seen by three team members, one might have a slow moment (before the doctor enters the room) and have a chance to have the discussion. Leave the paperclip on the slip so the other team members know that we've already discussed referrals with the patient and we don't need to duplicate that conversation or effort. The doctors need to lead by example on this subject, and especially when a patient is thanking the doctor and expressing satisfaction, the doctor should take the cards off the slip, use the dialogue and give the cards to the patient. Two cards per slip should be adequate. If a patient asks for more cards, give him or her more, of course!

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 in the way you want it done, not just something that is made up by an untrained team member who doesn't really understand how it should work or what the volume expectation is and is too prone to exclude cards from slips for those reasons.

Important points to include in the formation of your dialogue.

- Tell the patient you enjoyed having him or her 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 how much you enjoyed having him or her in the office (in the direction of the patient and the care and away from the team member or practice). Or if you want to initiate the conversation, this is an easy way to do it. It's a point of manners that doesn't always get said enough and patients respond well to hearing this.
- Validate the person for the care s/he is getting. Instead of seeing these procedures as routine (since you do them dozens of times per week), look at it from the patient's point of view. The treatment may seem unnecessary, costly, intimidating, etc. Tell the patient how important it is and what a good job s/he is doing by taking care of this.
- State the purpose of the practice, letting patients know you want to help them and everyone get the care they need.
- For that reason, if the patient knows someone who is having a similar problem or needs other dental help, send them in and we'll take care of them.

This can be condensed into something as simple as:

“We enjoyed having you in the office. It's great that you're (taking care of yourself, getting this done, keeping yourself healthy, taking care of this). 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 some such service. This forwards the idea that you want to help people detect and handle dental problems simply, so you're extending an offer to make it easy for them to do that.