

Visiting Referring Practices

When visiting referring practices, it's important to remember the following key points:

Prepare for the meetings

Before you visit an office, gather some information about the doctor(s), practice, referral volume (to your office), shared patients, outcomes, coordination needed, etc.

Remember that the visit is for them

It is not for you, and it is not just a social visit. These meetings have a desired and anticipated outcome.

Have a topic in mind for the visit

Decide how you want to strategically use this visit. For instance, you might specifically want to

- deliver more referral slips
- let the doctor know about an improvement in your office
- talk about a particular shared patient
- schedule a lunch and learn
- invite the doctor to an event
- let him/her know about training that's available

Tell about yourself/your doctor/your practice every time

For a while, you will be introducing yourself and talking about your role in the office. After that, you'll need more things to say about your office. Even with doctors you know well, you can always find new things to say about yourself and your practice. The point is to create a clear picture of your practice and how it can best be of help to the referring doctor and their patients.

Here are some ideas of things you can talk about:

- an interesting fact about your doctor's specialty training
- your office setup
- what kind of things set you apart from other offices
- your specialty equipment
- your staff
- your experience
- your cases
- how you can be of assistance to offices like theirs
- anything that contributes to increasing the doctor's/office's understanding of your practice and their confidence in working with your doctor and team

Learn about the referring doctor/practice

Find out more about how the inner details of the referring practice, like

- how the referral process is going with your office
- what you could do to better support their practice
- what they hear from patients who have been referred to your office
- what they find challenging when discussing periodontal treatment with patients
- what service they most often refer
- what they expect from a referral relationship
- what types of things you can help solve/take off their plate regarding shared cases

Emphasize your goal to satisfy all their referral patients

Stress your desire to return the patient back to their office in great shape and happy with the work you've all done together. When working with a doctor who doesn't refer as much, find out what they are up against (either with patients who need your services or with the referral process). Then, customize your response to align with what would help the most.

For example, the doctor may need assistance with patient education. You can detail how you can help through your treatment planning approach, where the doctor does a full evaluation with patients while a treatment coordinator works with patients on issues like timing, insurance, scheduling needs, the treatment sequence, etc.

Keep clear records

Accurately document what the practice asks of you and your practice.

Do what the referring doctors ask you to

The best way to strengthen or make progress in a referral situation is to be of genuine help. You might do this by

- taking something off the doctor's plate
- making something more convenient
- providing special help for a patient

Then, ensure that the news of your help makes its way back to everyone in the referring practice. When they can see the lengths you go to in order to take care of their patients, they will have more confidence and will feel more comfortable referring to you in the future.

Document your visit and update your team

Once it is over, document your visit and brief your team on specific information about the practice and patients. For example, if the referring doctor asked you for something, let your office staff know what it is and set up a means to provide it. The same is true with improvement needs. Fix any existing issues with patients or the referral process, set up systems to ensure the



issues don't reoccur, and notify the referring doctor and his team that things have been addressed, detailing how they're being resolved.