



Driving New Patient Flow

By Nancy Hyman

A practice representative can help win over referring dentists

Orthodontic offices have a number of specialized staff members, from receptionists to treatment coordinators. I would like to suggest adding a practice representative (PR). What does a PR do? He or she initiates and develops relationships between your practice and referring and potentially referring professional contacts.

The PR's visits to referring office/business will benefit the orthodontist in the following ways:

- Creating a positive image of the practice in the professional community;
- introducing your services to offices unfamiliar with you;
- strengthening the relationships with referring offices and their staffs, and
- expanding the knowledge base about the orthodontist's services and technology, differentiating your office from the competition.

The Plan

The PR will develop a target list of offices to focus on for a 12-month period. The list may be expanded after 12 months. PR visits will be scheduled on a 3-month rotation. Additional strategies outlined below will increase your contact with each referring office.

The orthodontist may want to schedule 10 non-patient days per year and accompany the PR on calls. During all visits, the referring offices will receive educational materials and a food item, along with the information packets, brochures, and any other items deemed necessary, such as announcements of upcoming special events. Targeting 90 referring professionals will require 2 field days per month, with 15 visits per field day.

1) Prepare a list of verbal messages/educational

messages to present at each PR call. This "strengths" list will assist the PR in developing a consistent message of services offered by the orthodontist, such as free consultations or evening/early morning/Saturday hours.

2) Create a one-page fact sheet per referring office. This information is gathered in an informal manner while conversing with office staff. Collect information such as primary referral source, food preferences, and the doctor's birthday.

3) Schedule referring doctor-to-doctor luncheons. Many orthodontists schedule lunch to discuss a certain case or plan a specific number of lunches annually.

The PR will host one lunch per month with key staff limited to one to three guests. Key staff includes the referral coordinator, the scheduler, and the office manager, but never a doctor.

Schedule 10 to 12 lunches for "A"-list referrers. This serves as a thank-you for the referral relationship during the previous year. This is strictly a social event. The PR delivers the lunch to the office with a thank-you for referrals, then makes a quick exit!

4) Review marketing materials annually and update offers (such as free panoramic x-rays, special discounts, or new services).

Present a before-and-after photo book at PR calls and in the orthodontist's waiting room.

As you add new technology or patient amenities, create letterhead notices to send to referring offices.

Present all marketing material in a folder during the first quarterly visit to a dentist. On subsequent visits, replenish materials and referral forms. Over the next three quarters separate and present materials such as your resumé, FYIs, professional articles, and program sheets individually.

5) Every 18 to 24 months, do a survey of your referring doctors.

6) Consider printing a “referred by (insert your name)” card with a logo on the front; put the referral reason inside. This card would be passed from you to the patient and from the patient to the referring doctor, securing your relationship with the referrer and assisting in the communication process.

7) Thank your referring dentists and their staff. Consider a referring staff lunch drawing to be distributed in-person to offices that the PR visits each month. The staff will fax back a drawing sheet, and the PR can randomly select a winning office to receive lunch in that month. Hand-deliver the lunch drawing announcement to offices visited each month.

Another option is a monthly referral staff drawing. To do this, mail out an announcement advertising the gift and providing the entry form. Then, draw a name and give one monthly winner a gift or gift card valued at \$50.

You should always send a birthday gift to your “A-list” dentists. For holiday gifts, consider Thanksgiving or Fourth of July instead of Christmas or Hanukkah. If you wish to give Christmas or Hanukkah gifts, deliver them the week after Thanksgiving.

Every 12 months, offer complimentary CPR to referrers and their staff. There are three ways to do this:

1) Invite referrers and their staff to the office about 3 times a year for CPR certification, and for overflow consider taking the training to those offices that can’t make those dates.

2) Send a CPR person to the referrer’s office.

3) Send out notices throughout the year for selected dates, and conduct certification in the specialist’s office on a first-come, first-served basis.

Another possibility is to offer flu shots for referring doctors and their staff. The third week of October is a good time to do this. Simply reserve 2 to 3 hours and send out notices to your referrers that you are going to be offering flu shots at your office. RSVPs are necessary, but not an appointment time. Provide a simple buffet snack. Several offices have reported that attendance is higher when this is scheduled as an evening event.

It can also be fun and useful to have an annual party for referring doctors and staff. This can be a barbecue, a movie night, a bowling night, a sangria reception—anything that shows your appreciation for your referrers.

For all of these promotional events, the PR must send three to four notices, starting at least 7 months in advance of the event. **OP**

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