

Establishing an Aggressive Marketing Vision

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In 2007, I had the privilege of consulting with several orthodontists on the path to retirement, either wishing to maximize the sales price when selling to an associate within two to five years or preparing the practice for the entry of a sibling or adult child completing orthodontic training. Current referral patterns require an aggressive approach to marketing any orthodontic practice in 2008. In conjunction with William R. Hyman, D.D.S., M.S., I recommend the following six strategies to implement your marketing vision.

1) *Develop a marketing vision.*

In our practice, Dr. Hyman and I determine the type of patient that we want and the minimum number of patient starts that will achieve our financial goals. In 2006 we started slightly over 700 new patients but were not satisfied with the overall quality of these patients. The increase in patient starts produced an unacceptable increase in poor payers, no-shows, and poor oral hygiene, along with many other issues. A year later we established a new patient start goal of 650, but desired higher-quality patients. With a fee increase of twelve percent, we were still able to reach our start goal of 650 by reaching out to dental offices in an untapped upper income area in addition to improving the quality and consistency of our patient promotions. We targeted our current patients for referrals by using a wide variety of marketing materials produced by PracticeMarketer.

"Each member of the staff is an integral part of a successful result."

In order to develop a marketing vision for your orthodontic practice I recommend utilizing quantifiable data from the 2007 calendar year along with setting realistic goals for 2008 based on past performance. The basic numbers you will need are:

- Number of new patient starts
- New patient exam conversion rate
- Number of patient/doctor referrals and referrals from other sources
- Production/gross collections
- Marketing tactics

2) *Identify your target audience.*

Successful marketing of your practice relies on reaching three or four targeted groups. Typically, these are the most sought-after groups by orthodontic practices:

- Referring professionals and their staff
- Patients and their parents, who frequently refer family, friends and community contacts
- Your staff, who regularly refer family, friends and community contacts

- The community, since many practices directly target via walk-a-thons, health fairs, etc.

Identify the groups you wish to target and then develop professionally conceived marketing materials that apply directly to each specific group. Dr. Hyman's office promotes patient referrals by using an "asking for referral" offer card that benefits the referrer and the potential patient. The card is specifically designed for presentation at the deband appointment.

3) *Conduct a SWOT Analysis.*

Examine the strengths, weaknesses, opportunities and threats within the practice.

- Strengths: location, fees, hours, amenities, etc.
- Weaknesses: signage, professional relations, communication, etc.
- Opportunities: create professional referral program, establish communication guidelines, update signage, etc.
- Threats: increased competition, reduced insurance reimbursements, etc.

The SWOT analysis will determine which positive aspects (strengths) of the practice to promote to referring dentists and patients. Weaknesses are areas of concern to be improved upon with the assistance of a strong marketing vision. Opportunities are the concrete plans to counteract the weaknesses in the practice. Threats are generally issues that are out of the orthodontist's control, but still should be considered and examined.

4) *Establish a budget, an annual marketing plan, and a designated person to administer the plan.*

The annual marketing plan should be readily available in a one page format for frequent review (Contact Nancy Hyman's office for a sample). This plan should include:

- Analysis of market trends (see Chris Bentson's article *Where Have All The Patients Gone* in Volume II, Issue IV of *Bentson Clark reSource*)
- Successful marketing tactics currently employed
- Specific target markets
- Production of professionally developed branded materials
- Strategies to distinguish yourself from the competition

Once the marketing plan is conceived, it needs to be agreed upon by the orthodontist and marketing manager. The plan should be reviewed with the entire office team before implementation.

Continued on page 6



Establishing an Aggressive Marketing Vision

Continued from page 5

5) Implement your marketing vision and plan.

The doctor and the marketing manager must share the marketing vision and continually train staff to communicate this vision with genuine confidence both in person and via telephone. Training should include tactical steps, divided into referring doctor, staff and patient segments. As an example, in our office, separate team members are assigned to the following tasks as part of our January patient marketing calendar:


- Distribute patient survey
- Distribute oral hygiene promotion
- Ask patients for referrals with "offer" card
- Ask patients at deband for referrals with referral card

I recommend two types of scheduled meetings for your team. Use a monthly marketing meeting for the full team to analyze the prior month's statistics. Include a 30-minute segment on a specific marketing initiative. The meeting should utilize the monthly statistics report (Contact Nancy Hyman's office for a sample). Use a weekly meeting to focus on weak points in plans (poor collection, low patient starts, etc.) and seek to remedy any concerns with proactive measures. The weekly meeting should include the office manager, marketing

director, treatment coordinator(s), financial manager, insurance biller, and receptionist(s).

6) Establish a marketing book.

The marketing book should include all materials that you have produced for patient and doctor referrer communication and marketing such as patient letters, phone scripts, correspondence for referring doctors, resumé(s) for practitioner(s) in the office, office brochure, surveys, patient/referring office drawings, etc. Review it annually for critical evaluation and updating purposes.

In our office, it is my goal to energize the entire team with designated marketing assignments. Each member of the staff is an integral part of a successful result. Establishing a marketing plan, assigning team members to the implementation of the plan and maintaining consistent oversight to insure realization of your goals will result in realizing your 2008 goals. 

Nancy Hyman developed the Practice Referral System for the office of Dr. William R. Hyman, resulting in a fivefold increase in practice growth. She has consulted with numerous orthodontic practices, helping them achieve their practice goals. Nancy can be reached at nancy@hymanortho.com or 323-308-9817.

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