

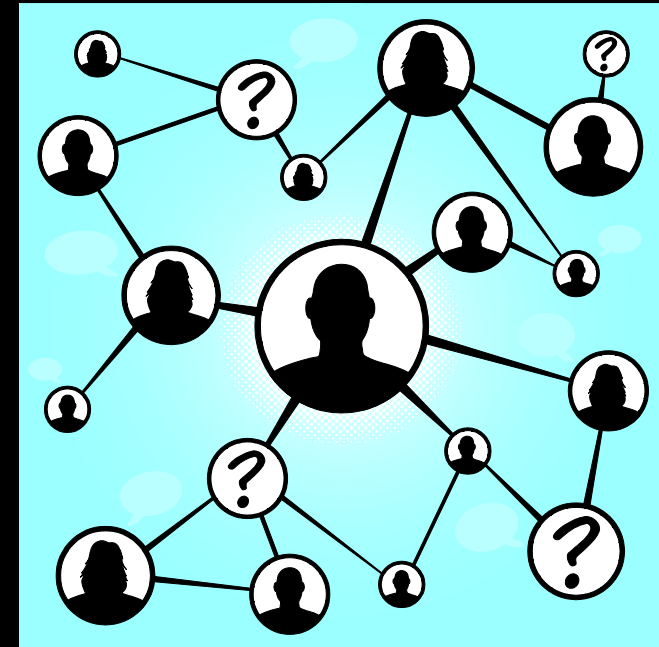


# EXPANDING AND GROWING YOUR REFERRAL MARKETING

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# WHAT IS REFERRAL MARKETING?

- The marketing strategies one uses to promote products/services to new customers through referrals.
  - This typically happens through word of mouth.
  - “Spreading the word”
- Receiving direct recommendations or medical referrals from surrounding businesses or practitioners that are outside of your specialty.
  - Dr. to Dr. marketing



# IN THE BEGINNING

## PREVIOUS EMR

- Extensive database over 20 years
  - Pulled in from various sources (online listings, YellowPages)
  - Patients were not necessarily connected to practitioners
- EMR had been in place for 18 years previously



# WHAT WORKED & WHAT DIDN'T

## PREVIOUS EMR

- **What worked**

- Having so much information- sometimes the more information you have the better!
- Lots of contacts to reach out to

- **What didn't work**

- Pro was also the con: too much information
- Database had not been updated
- Inaccurate information
  - Offices had moved, people had changed, high turnover
- Lots of irrelevant information
  - ophthalmologists in database
- Overall overwhelming



# MOVING FORWARD

EMR

- Consolidated overwhelming spreadsheet to solely “A doctors”
- Broke spreadsheet down into A, B, C & D doctors
  - Categorize based on the number of patients sent by the doctor
    - A= 4+, B= 3, C= 2, D= 1 F= 0
  - Every quarter this categorization is re-evaluated
  - Clear out D & F doctors
    - Ensure that you have an explanation for why they are a D/F doctor
    - i.e. The Dr. doesn't see a lot of patients.
    - i.e. Still working on cultivating the relationship with the Dr.

# MOVING FORWARD

## MASTER LIST

	A	B	C	D	E	F	H	I	K	L	M	N	O	Q	R	
	Last Name	Referring Physician Name	Cred	Practice Name	Address	City	Zip Code	Phone Number	Specialty	Other Staff	Best Time for Doc	Office Mgr	Referral Contact	Q2 2015 Referral #'s	visits	
1	Abbott	Don	MD		3700 Rufe Snow	North Richland Hills		(817) 590-2395						0		
2	Abbott	Lisa A. Abbott	MD	Family Healthcare Associates	3601 N. Hwy 157	Mansfield	76063	(817) 473-7962	Family Practice, Internal Medicine				Mary-R/C	0		
3	Abel	Shawn	MD		601 Clara Barton	Garland		(972) 272-7887								

# MOVING FORWARD

EMR

- To ensure the spreadsheet is up-to-date every quarter I update:
  - Doctor rating (A- F)
  - Number of referred patients
  - Add marketing services to notes section
    - i.e. visited them, business cards, flyers, lunch and learn
    - This way you can cross-correlate actions with results
      - Are your efforts working or are they not?
      - i.e. 4 visits per quarter brought 8 patients into the office
- Make this data digestible and easy to update

# MASTER SPREADSHEET SORTED

Referring Providers	A Docs	B Docs	C Docs	D Docs	F Docs
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## A Docs list example

Last Name	Referring Physician Name	Cred	Practice Name	Address	City	ST	Zip Code	Specialty	Other Staff	Office Mgr	Referral Contact	Q2 2015 Referral #'s	visits	rating
Buksh	Stephen R. Buksh	MD	Northeast Tarrant Internal Medicine Associates, LLP (NETIMA)	479 Westpark Way	Euless	TX	76040	Internal Medicine		Kerri Cooper	Bianca-R/C	20		A
Stroud	Joyce L. Stroud	DO	Southlake Family Medicine	731 E. Southlake Blvd, Suite 100	Southlake	TX	76092	Family Practice			Carrie Hanson, MA's	17		A
LeCroy	Kenneth D. LeCroy	MD	Lighthouse Family Medicine	6630 Colleyville Blvd	Colleyville	TX	76034	Family Practice			David Murray-OM	16		A
Hayes	Lorrie	MD	Baylor Family Medicine Colleyville	5408 Colleyville blvd	Colleyville	TX.	76034	Internal Medicine				15		A

# MOVING FORWARD

## ACTION PLAN

- Old way: Give out flyers and business cards on occasion
  - No connectivity
  - The office did not know the person who was sending the marketing materials.
- New way: Made referral marketing very personal.
  - Know staff names and personal details
  - Hand deliver marketing gifts
    - Geared towards office staff
    - Stress balls, Slinkys, notepads, etc.
    - These gifts are not only conversation starters but they take the pressure off

# WHAT WORKS

## ACTION PLAN

- Previous experience from working at the front desk.
  - What annoys me when someone comes to the office?
  - What would interfere with my daily tasks?
  - What made me feel important?
    - Ask your front desk these questions.
- No paperwork
  - Most likely be forgotten
  - No time to distribute them
- Fun toys
  - Non intrusive, useable, something they will keep
- Don't interfere
  - Know their schedule, who to talk to, etc.
- Go in with minimal information
  - Unless they are interested in talking more
  - Schedule doctor meetings 24-48 hours prior



# LET'S TALK ABOUT GOALS

- Changing the conversation from the primary doctor to the practice overall.
  - How do we build this when we have more competition?
- Build referral marketing in new office locations.
  - How do we replicate what works?
  - How do we build relationships?
- Being more involved in the community.
  - Get more people to physically see us at events.



# OTHER REFERRAL SOURCES

## EXTERNAL MARKETING

- Past:
  - Sponsor two races through Lake Grapevine Runners
  - Sponsor South Lake Invitational for cross country
- This year:
  - Sponsored 7 events
    - Packet pick up for races, donating time, giving away branded prizes
  - Aligned ourselves with Dallas athletes
    - Fall in line with what we are interested in doing
    - Have a passion for running, raise money for charities, want to make it fun!
  - Focused on letting the community know that we are here and knowing that we are a part of you

# TURNING THE TITANIC

- It's going to be slow.
- It's going to be challenging.
- It's going to take time and convincing.
- Getting individuals out of old habits and forming new habits.
- Sometimes you have to ask hard questions.
  - What am I not doing?
  - What do you need?
  - Sometimes the answer may not be something you are willing to do.



# WHERE IS IT SCARY?

- Who is going to care about me?
- How am I going to get through?
- What am I going to do?
- Remember everyone in the office is just like you!
- Know your own practice 100% before you walk into someone else's
  - Create credibility
- Be prepared to answer any questions that could come across
  - i.e. what treatments do you have for bunions?
- Know what you can do for them



# IN CONCLUSION

- Make your database digestible
- Keep referral marketing personal
- Ask yourself hard questions
- Connect with your community
  - Reach out to doctors/potential patients, get involved in events
- Know your practice & its services
- Find out what you can do for others