Internal marketing: Developing a patient-based practice

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Most health care professionals invest in marketing only when their market changes or their business is declining or experiencing slow growth. A balanced marketing plan must be part of your growth and profit strategy, especially during these challenging times. The mix should include external marketing such as advertising. Advertising alone is an option with no guaranteed return. Internal marketing is centered on the patient with the goal of ensuring loyalty so that current patients will invite new patients.

The number of general practitioner referrals is decreasing (48% in 2007 vs 41% in 2009), and the number of patient referrals is increasing (30% in 2007 vs 35% in 2009). Patients evaluate quality orthodontic care based on different metrics than orthodontists generally do. Orthodontists often define a successful case as a Class I occlusion obtained with a financially profitable treatment plan. Patients define excellent orthodontic treatment by the manner in which they are treated—whether they are seen for appointments on time, the office location is convenient, they have had few emergencies, and the treatment is completed on time. Patients assume that their teeth will be straight and that they will have a beautiful smile once treatment is complete. For quality internal marketing to ensure patient referrals, expectations need to be exceeded. As the orthodontist, you will need to provide the best occlusion and a beautiful smile.

OFFICE EVALUATION

Now is the time to evaluate your office. It can be very eye-opening to have someone who has never visited your office walk through and give you feedback. What is the environment in your office? Does it project the feeling you want your patients to experience? Every doctor and staff should develop the experience they would like to provide when patients come to their office. This is different for every orthodontist, office, and demographic region. Is this a fun and exciting environment, or is it more traditional and conservative? The environment and feeling should match you and the physical space you have. Review all of your written and verbal materials. If you have not had a revision and a fresh look in the past 5 years, it may be time to find a new brand for your office. There are many good marketing teams that can give your practice a new look, possibly without a complete revision or great monetary expense.

To determine whether your office is in need of change, ask yourself and your team some important questions:

- Are patients seen on time?
- Are procedures completed on time?
- Is treatment completed on time?
- Is equipment to perform procedures available?
- Are clear protocols developed?
- Is employee training provided?
Asking these questions will help determine what technology, products, and training are needed to make sure you provide the best patient care possible.

A good starting point for defining your patients’ expectations is to survey your present patient base. What is important to them? How are they judging you, and how are you at addressing their needs? Once you can define who your patients are (where they work, where they go to school, etc) and what their needs are, you can then establish a patient plan that will exceed their expectations and allow you to gain patient referrals.

PATIENT PLANS

Your patient plans should include each step in patient treatment, from the initial phone call to graduation and retention. The plan should define what will happen at each step, who is responsible and who is the backup, full scripting for consistency, the transition into the next step, as well as an introduction to the team member who will be working with the patient at the next visit. Having patient plans in place will ensure that all patients move through their treatment smoothly and consistently. The same quality care will be provided to each patient, and each team member will be able to deliver a message of consistency.

When developing the patient plan for your practice, do not let present constraints alter your perfect plan. Disregard present physical space and team members as well as other restrictions. Once you understand what the ultimate goals are, you can determine which will be short-term goals and which will be long-term goals with more financial investment. Including present conditions in your plan will not allow full development of your patient plan. Look at what is needed in each step of the plan to provide the patient experience you have defined. Is new technology needed, new written information, or simply consistent scripting and training the team to a new level of patient care?

If new technology is needed, use your resources to determine what will be the best fit for you and your practice. Technology is not a one-size-fits-all concept. There are many excellent options on the market that should be explored prior to making a financial investment. Using your colleagues and study groups is a great avenue for accurate information on how the implementation worked in their practice. The use of consultants can offer an independent view that may give you a different insight to the product.

Reports show that during a visit to your office, patients will have four contacts. Developing a consistent message that can be delivered by each team member at each contact will assure your patients that your team is a unified force. There should be guidelines and scripting for:

- Scheduling (cancelled and missed appointments)
- Emergency visits
- Breakage
- Compliance
- Oral hygiene

Clear guidelines in these areas will empower your team to deal with difficult situations and patients. Once patients learn the guidelines for your office and that each team member follows them, the attempts to bypass the system will decrease. It is very important to have your team trained with the proper verbiage to deliver the guidelines to the patient in a positive manner.

A job description for every position in your practice is a critical piece in the development of valuable team members. You cannot expect employees to perform to your standards unless there are clear expectations. When team members
are hired, they should be given a clear job description, as well as a timeline and training. Oftentimes, when experienced team members are hired, they are simply placed into the position without a clear definition of their role in the office, an outline of what is expected of them, or the training needed to fulfill the position. This is a system failure, not an employee failure. Make sure employees have all the tools and training necessary to become valuable team members.

**EMPLOYEE DEVELOPMENT**

Once a plan is in place for each patient to move through treatment, some important questions need to be considered. Do you have the team to deliver this patient experience as is it is defined in the patient plan? It is important to evaluate your team to confirm that all team members are able to deliver the quality care you desire and have the necessary training and equipment. An individual performance-planning session with team members will evaluate their present role in the office and whether it is the best position for them and for the office. Specific goals—both personal and officewide—should be set for the year, along with what training and equipment will be needed to reach these goals. If there are existing employees who are unable or unwilling to provide the quality of care you want for your patients, it may be time to review their need in the practice. If you have team members with the right attitude, the proper training can help them fill the needs of the office.

To retain quality employees, it is necessary to understand how to fulfill their needs. A good place to start is by understanding what your employees want from a workplace. After all, if you know what your employees desire in a work environment, you simply need to provide it and all will be well. This is great in theory, but research shows that employers are not that successful at identifying what their employees actually want. In fact, there is a significant disconnect between the things that employees say are important to them and how highly employers rank those same things.

The first step in understanding key factors in retaining employees is to allow team members to prioritize their needs. In this exercise, each team member are given the following list. Clinicians will receive the same list.

- Full appreciation for work done
- Feeling a part of things
- Sympathetic help on personal issues
- Job security
- Good wages
- Interesting work
- Promotion and growth opportunities
- Personal loyalty to workers
- Good working conditions
- Tactful discipline

Team members should review the list of items and select the one most important to them, then continue to rank the remaining items in order of most important to least important. Clinicians should review the list of items and select the one they feel is most important to their team members, and then continue to rank the remaining items in order of most important to least important.

A one-on-one review of this information will ensure that each team member has the opportunity to express his/her areas of importance. Once you have this information, you can establish communication and goals for the upcoming year. Making sure employee goals match the practice goals can allow you to
determine the fit for employees in the team and practice. This may also be a
determining factor for retention of employees who cannot meet the practice
goals.

Now, the patient plan is in place and the team is on board to deliver the
highest-quality patient care. Each team member has specific personal and
office goals (from the performance-planning session) for the upcoming year.
Specific training time needs to be set aside to allow team members to accom-
plish these goals. Too many times, new technology or products are introduced
into an office without any training for the team. We have all purchased an item
at a meeting, brought it back to the office, and used it without any instruction.
Besides not getting full use out of the technology or product, there is often
misuse of products that can cause bond failures and other issues.

ON-TIME SCHEDULE

The most common complaint patients have with an office is being seen late
without any explanation. When working with an office, I often hear “We have
to keep the exam on time.” Each appointment should be kept on schedule,
but without emphasis placed on any specific appointment. If an initial exam
appointment is kept on time at the expense of the clinical flow, the reputation
of the office may suffer. During orthodontic treatment, approximately 90% of
a patient’s care takes place in the clinic. As patients complete treatment and
reflect on the care they received, they will place more emphasis on the times
they were seen in the clinic over the one time they were seen for their initial
exam appointment. All appointments need to be started and finished on time.

A good rule to remember is to promise your performance and perform as
promised. Following your schedule template will allow procedures to begin on
time. Starting on time is important, but finishing each procedure as scheduled
is just as important. Many feel that if you get patients into the chair on time
for their appointment, they will be happy. You need to make sure that you can
complete procedures in the appointed time to start the next patient in a timely
fashion. This can be a vicious cycle and is the downfall of many schedules. I
recommend that clinicians document the ending time for each procedure to
help keep them on track during an appointment. The template should be built
to allow each clinician to complete the prescribed procedure in the allotted
time. If a patient arrives late for the appointment, the clinician should accom-
plish all that can be completed in the appointed time.

Remember, the goal for a successful orthodontic practice is to exceed pa-
tient expectations. I challenge you to exceed yours.

REFERENCE


Andrea Cook’s in-office, hands-on training motivates and energizes orthodontic cli-
nical teams. She bases training systems on practical knowledge gained through 20 years
of chairside experience. Andrea works as a clinical consultant and trainer for premier
orthodontic offices across the country. Since effectively training clinical team members
is critical to the advancement of clinical productivity and profitability, Andrea works
with teams to increase efficiency and improve communication and guides the office
to a new level of excellence. For information on developing and implementing patient
plans, job descriptions, running your clinic on time, and other clinical and sterilization
needs, visit her website at www.andreacookconsulting.com.