

Lina Craven looks at how to turn prospective patients from 'onlookers' into 'players'.

How confident are you that your practice is seizing every opportunity a prospective patient represents? Many practices are very good at attracting new patients but a shocking amount waste the money spent on attracting these patients by failing to convert a new enquiry to an actual patient. Case acceptance is not going to increase by merely answering the phone in a polite manner. What separates ordinary from extraordinary performance? What is it that successful businesses know and do consistently that gives them their competitive edge? Excellent customer service!

On behalf of clients I often carry out mystery shopping exercises. I call practices throughout the country to test out their responses to new patient enquiries. What I hear sometimes would make your hair curl. My secret shopper calls reveal that many practices are frequently failing at the first hurdle and losing potential patients. In one exercise in summer 2015 I called 14 practices. We have a set criteria we use which helps us determine if the call was handled appropriately, ethically and to ensure that opportunities for converting an inquiry into a consultation were not wasted. The results were astonishing. In brief: Out of 14 – 2 did not answer when called and we tried twice! So out of the 12 I managed to speak to 12 / 12 never asked for my name or details. When asked about treatment costs. 12/12 did not explain properly. 12/12 did not build any rapport. 12/12 did not offer to send me a practice information pack. 12/12 did not offer me an appointment!

All were polite with some sounding 'busy'. Polite and nice is not sufficient – outstanding is the goal.

Exceeding a customer's expectations is a mantra often repeated by business gurus and consultants but it isn't difficult, isn't expensive, generates the greatest return yet is the rarest commodity across all industry sectors.

One way to deliver excellent customer service is to focus on doing the basics brilliantly. The first contact with a potential patient is crucial to a successful conversion. Patients are generally unaware of the skills of the clinician or the reputation of the practice so they will tend to shop around. Their decision-making process isn't normally price oriented; it is simply based on their experience and whether their needs and wants have been taken into account when treatment options have been offered. That means the new-patient journey needs to be outstanding.

Your Treatment Co-ordinator should really be the main point of contact for potential new patients but everyone in the team should know how to deal with an initial telephone call – and no matter how busy they are, should do it correctly.

Whenever you speak with a prospective patient, do so from a 'distraction-free' place.

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If you call them always ask if it is OK to talk; if they say it is not a convenient time then arrange a mutually suitable alternative, otherwise carry on. They must have your full attention because you only have this one chance to make an outstanding first impression.

Be attentive and speak with a smile in your voice. It's free - it doesn't cost a penny! Confirm personal details and the referral source. Explain what the initial consultation involves. Start building rapport by asking the 'right sort of questions'. Agree on an appointment time and advise them that they will receive a welcome pack in the post detailing practice information and the types of treatments available.

This is not a chance to start making a diagnosis on the telephone! This is an opportunity to ensure your prospective new patient learns about the practice, the services you provide, what to expect from the initial visit and for you to communicate the practice's values through simple yet effective communication techniques such as saying: "Mrs. Smith, we look forward to seeing you on the 24th. You will be impressed with Dr. Jones, he is a great clinician".

Then send out your welcome pack promptly. The pack forms part of the initial first impression too. This is where your investment in good marketing pays off. It should portray the values of your practice and answer all the potential questions a new patient has; a patient is much more likely to make a buying decision when they have been well informed prior to and during the consultation.

Every practice must have a patient journey tracker. Since we are focusing on the initial contact, on your tracker your first columns are:

- a) patients name
- b) date of referral
- c)referred by (web, dentist, friend etc)
- d)first contact made (date)
- e) initial cons date
- f) if not why not

It is crucial all practices make a note of ALL inquiry calls made. This way you can see at the end of each month how many call inquiries were made and how many made appointments and if they didn't, whether they were sent a practice pack and if any follow up is needed.

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One crucial part to turning 'onlookers into players' is the courtesy call they receive a day or two before. Do not use the same jargon: "I'm *just* calling to confirm..." This is again an opportunity to continue helping the prospective patient buy into it: "Mrs. Jones, this is Lina from Mr. Smith's practice.

You have an appointment with us tomorrow at 10am. I wanted to make sure you have received our welcome pack and that you know where we are... "Take this opportunity to exceed their expectations." "Mrs. Jones, the main entrance to the NCP is closed – please use". This is exceeding your patient's expectations and reduces your FTA and cancellation rate.

BOX: KEY POINTS

- Good marketing and good phone manner is not enough to turn onlookers into players. Excellent customer services is vital
- Get the basics right. Make sure everyone in the team knows how to handle all initial patient enquiries
- Introduce a Treatment Co-ordinator and make them the point of contact for all new patients
- Treat every call as an opportunity to practice good customer service. Take time to ask questions, to talk about what your practice offers and to let them know what they can expect from their visit
- Follow calls up with a welcome pack
- Ensure the call you make before an appointment is more than just a confirmation but another chance to exceed patient expectations
- Keep a patient journey tracker to log inquiries, follow-ups and appointments.

These are tough economic times we are facing. However people are still spending they are just spending more wisely. This is why it is crucial to make sure your staff are trained to make an outstanding first impression and create a solid opportunity for another case acceptance. Turn them from ordinary to great!

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About Dynamic Perceptions:

Lina Craven is the founder of Dynamic Perceptions; a management consultancy and training firm that can draw on many years of patient experience. "Our purpose is to help practices achieve a superior patient experience that results in improved efficiencies and an increased bottom line". Dynamic Perceptions is running courses throughout the year focusing on increasing case acceptance. For more details, visit www.dp-practiceconsultants.com