



ORTHO2

# Professional Relations... Going the Extra Mile

In this ever-evolving referral picture don't forget the basis of most successful orthodontic practices; robust referrals and admiration from your dental community. It is time to add big tent productions to your professional relations marketing calendar. In addition to traditional dental visits look at larger events that gather your referrals at one location for educational and/or social purposes. Open your invitation list to all dental offices within a specified proximity to your practice and watch current referrers energize their efforts and unfamiliar offices jump into the referral mix!

Don't forget a dated event protocol. Plan the event with a six-month lead time (when feasible) for maximum exposure.

Six months prior to event, hand deliver and mail save the date cards. Indicate that an invitation will follow.

Four months prior to the event, hand deliver and mail invitations. Allow space for the attendees to indicate the name of doctor(s) and staff attending, office name, contact person, phone number, and optionally an e-mail address.

One month prior to the event, resend the invitation or call non-respondents. For those who have responded they are attending, send a confirmation letter and directions to the location of the event. Two day prior to the event, call to remind attendees.

After the event, send a thank you note to all attendees. For an extra impact consider having the orthodontist and practice representative hand deliver a thank you note to all attending practices.

## Event Ideas

- Consider an OSHA presentation for dentists and their full team. Provide the lecture (6 CE units) every other year at a professional meeting space. Leslie Canham (leslie@lesliecanham.com) is certified in this area of expertise across the country. Alternate the OSHA

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meeting with creative subjects: customer service, collections, dental procedures, marketing tips, etc. Rosemary Bray (rosemarybray@msn.com) conducted a wonderful customer service presentation for our dental community in 2013 and the standing room-only audience response was nothing short of amazing!

- Offer CPR training to referring offices. You may select several days throughout the year and offer the course in your office or you may offer the course in the referrer's office. Select a professional CPR company and send four notices throughout the year if offering in the GP's office or select two CPR days at your practice. The marketing manager will coordinate the training date for the referring office, and call to remind the office and CPR person two days before the event. It is not necessary to provide food or be present if the event is at a referring office. If the training is at your office provide a light snack and have select staff present.
- I recommend conducting a flu shot clinic for your referring offices in September. Provide a light lunch and allow two hours for an even flow of attendees. I recommend holding the clinic from noon to 2:00 P.M. although several Ortho Referral Systems clients hold the event at the end of the day and report a well-attended group. I prefer lunch events as many staff members are concerned with childcare after hours.
- Add a holiday party at your practice to the marketing calendar. The event may be a spring tea, Cinco de Mayo taco bar, Fourth of July fest, Thanksgiving feast, or Christmas/Hanukkah party. What a great way to show off your practice! Plan the same theme every

Reprinted from

**The Newsletter for Members and Friends of Ortho2**  
October 2014 - Volume 32 Issue 4

year and create excitement by adding simple strategies. Start with a basic party theme and expand annually by replacing one activity with another each year. For a Christmas party start with a raffle, replace with door prizes for all attendees, replace the following year with photos with Santa, etc.

Keep you referral partners in the know with an event calendar for flu shots, CPR, monthly drawings, etc. A well-organized office may produce a one-page calendar highlighting special events offered by your practice. The calendar may be updated and replaced at the mid-point mark if needed or you can produce a 6 month calendar. ☺

## About the Author

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Nancy Hyman shares her practice growth program as founder of Ortho Referral Systems. She has helped many orthodontic practices jump-start patient referrals, increase case acceptance, and improve implementation of practice growth systems. Nancy is teaching one class at the 2015 UGM.