

Surveys Are a Marketing Tool

Creative survey tactics can reap rewards for your orthodontic practice, including increased awareness for areas of improvement and communication opportunities with your respondents. Your targeted audience will feel heard and appreciate your interest in their responses. Every patient and parent is a customer and customers want to be heard. The patient is concerned with YOUR concern and reacts favorably when valued. Orthodontists across the country strive for excellent treatment, however these generous efforts fall to the wayside in the face of unhappy customer satisfaction. Numerous doctors have shared their frustration with me about lack of patient referrals. Closely examine your patient's impressions and listen to what they have to say about your practice. A happy audience is a referring audience!

Identify keys to a successful survey process: identify your target audience, your team's role, goals, length, topic(s), survey creation, distribution, incentives, reminder e-mails, and your response.

Target Audience: Examples of target audiences include: initial exam and recall patients/parents, active patients, debonded patients (at or after debond), parents, youth or adult patients, and in a nod to the GP's, professional referral sources. This article focuses on patient and parent surveys.

Invitation: How will you invite your audience to participate? For patients and parents you may invite participation via e-mail blasts, Facebook and Twitter announcements, and posters and signage displayed prominently throughout the practice. Staff may wear buttons as well!

Team Approach: Every team member will play a role in project success. The clinical team will talk up the survey. Place announcement slips in the clinic for your team's convenience. A team member waiting for the doctor may talk to the patient and parent, and hand him or her a buck slip (dollar-bill-sized slip) highlighting details of the survey:

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goal, incentive, time period, etc. The front office team will hand each target a survey at check out. The survey should always be returned to a locked box, never handed to a staff member. If the survey is available to your full audience, clipboards may be available in the reception room and participation is encouraged by the front office team. Reception room surveys are a supplement to a handed form, not a substitute. For initial exam and recall targets the treatment coordinator will ask for participation.

Goals: Meet with your team to determine your true goal. You may want to find out what improvements patients suggest, if your current processes and amenities please your audience, gain feedback on possible practice changes, etc. Your goals are two fold – identify what you want the survey to accomplish, while also creating a sense of caring for the audience's input.

Distribution and Timing: There are several choices when implementing a survey and I recommend a tiered approach. Review the Team Approach notes and determine when the survey distribution will be most effective: annually or twice per year, at debond only, at initial exam or at key points in treatment. Many practices offer an annual survey for an eight-week period, and a separate survey to individual patients at debond. A key element of communication is e-mail. Collect e-mail addresses of all active patients and parents. Follow these three steps for an accurate e-mail list:

- For a 6-8 week period update e-mail address when the patient arrives for an appointment or at checkout. This strategy may be tied to a patient drawing.

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- Call any patients lacking confirmed e-mail addresses after the initial 6-8 week period.
- The Treatment Coordinator will confirm all initial exam and recall patient e-mails at the point of exam. An Ortho2 report will quickly alert you to your success in this project. Reminder e-mails are the key source of maintaining excitement and encouraging participation. For an eight week project plan on 2-3 e-mail announcements. Announce winners and participation dates. If the surveys are ongoing announce winners monthly.

Incentives: Successful projects are always amplified by an incentive program. A warm thank you and the opportunity to win a prize will encourage strong survey participation. You may opt to reward each participant. Or if your survey is ongoing, create a random drawing for a set number of prizes per time frame. Incentives may include a \$5 gift card, yogurt/ice cream coupon per participant, or a random drawing consisting of multiple gift card winners in the \$25-\$50 range. Announce your winners in the office and on Facebook! Display a photo of the winners and the doctor on your community board. Your local newspaper may also be interested in article about the winners.

Your Response: There are two portions of the response element – your response to the participants and the changes created by participants’ comments. Respond to all participants providing a name. In addition to individual responses consider a general response in a patient newsletter. E-mail or mail a response thanking the participant and outlining several changes implemented by the practice based on popular requests.

As an example, I worked with a client who received several comments about the crowded reception room. Creating an amenity driven environment and increasing use of the On-Deck area will alleviate this concern. A great selection of magazines, a workspace with a computer to check e-mails, simple Wi-Fi instructions, treat or beverages, a flat screen playing educational fare will create a welcoming respite from the parents’ busy day. Let your reception

room parents and patients know all about your wonderful amenities!

Divide the responses into two initial categories – complimentary and opportunities for improvement. Complimentary responses may be shared with the staff and used to determine what aspects of the practice are noticed. Use these common elements in talking with new callers and initial exam patients.

Opportunities for improvement responses may be categorized into three areas: yes, no, and future project. Assign a team to review each suggestion and the steps needed for implementation. Do not eliminate any suggestions until you examine a plan that will make the suggestion a reality. The orthodontist will meet with the team and discuss each suggestion and its plan before deciding which projects to implement. Approved projects will have a leader, a team if needed, a time line, and a budget. Meet weekly to discuss progress on approved plans. Be open to suggestions as your practice matures. For example, doctors with young children may not be amenable to a change in office hours until his or her children leave the nest.

Don’t ignore this important segment of your marketing plan! Create a vibrant “Benefits of Choosing Us!” list from your respondents compliments and learn from suggestions and areas of concern. Look closely at each area of concern and implement a plan that shows your audience how much you value their willingness to share with you. ♡

About the Author



Nancy Hyman is a speaker and practice growth consultant specializing in referral systems and increased case acceptance. She will be presenting two classes at this year’s Users Group Meeting in Las Vegas.