



ORTHO2

Winning Marketing Initiatives

Developing innovative promotions that keep your referring dental offices excited about your services is a challenge. Put your best asset to work with a designated two person marketing team within your office staff. This marketing team is a valuable resource for promoting your office to dental professionals. For an orthodontic office with 100 referring dental offices I recommend creating two teams to conduct practice representative (PR) visits. Each team will call on 15–17 offices per month, visiting all 100 offices once per quarter. This marketing strategy is based on utilizing the current referring dental offices and adding practices that do not currently refer.

Continue visiting the practices that are not referring to keep your brand of service in the minds of potential referrers. After 12–18 months of concentrated marketing, revise your list to eliminate the non-responsive offices. Pitfalls to this program can include inconsistency of practice visits and non-compliance of customer service excellence by staff members, so be sure to review the program periodically.

Goals for the marketing team:

- 1) Create messages that promote the practice, developed with your “strengths list.”
- 2) Increase professional referrals.
- 3) Have a consistent marketing plan for the marketing team to follow.
- 4) Organize PR rounds to gain referrals from new/unfamiliar dentists.
- 5) Educate referring dentists and non-referring dentists on the benefits of referring specifically to your office.

Materials to present on a call:

Contract with a professional agency for all marketing collateral.

- Brochures
- Welcome Packet Stepped Inserts

by **Nancy Hyman**

- Asking For Referral (AFR) Cards
- Website Design

Script each dental office visit:

Promote the positive aspects (“Why you”) of your office.

- 1) Hand the thank you gift to the front office personnel.
- 2) Thank the staff for their referrals.
- 3) Remind the staff of benefits of referring to your office—use your “strengths list.”
- 4) Present an educational piece or fun activity.
- 5) Ask if more referral cards are needed.

Request to speak to primary referral person, if available. Determine the primary referral person during the first visit. In many dental offices it is the front desk personnel, doctor’s spouse, or hygienist.

I recommend four visits per year and a minimum of five supporting strategies (as described below) for optimum exposure. In most areas a minimum of 75–100 dental offices should be visited.

Recommendations

Keep revising and adding to the list of referrers to visit. Canvas through the designated PR call areas, note the dentists not currently referring, and make contact with these offices. Review the new patient call tracking sheets weekly for any new or unfamiliar doctors, or print the Dentist List (Practice Reports > Table > Dentist List). Each new or unfamiliar doctor may be added to the call list.

- Consider using one non-patient marketing day per month for lunch and learns, practice rep lunches, practice rep calls to referring offices, etc.
- Capture referring “A” list dentist’s birthdays and reward them with a gift.

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- Prepare quarterly verbal messages (“strengths list”).
- Revise referring office fact sheet.*
- The practice reps will offer a fun lunch drawing to dental offices seen in each month. This drawing is hand-delivered during practice rep visits. Our marketing team selects four winners per month and lunch is delivered by the team. The team greets the winning office staff but does not stay for lunch.
- Send holiday gifts during the week following Thanksgiving. Reevaluate the holiday gift budget. Refine the recipient list, adding new contacts.
- In place of a winter holiday gift consider a signature gift tied to your geographic area: a strawberry-themed treat tied to the local strawberry festival, Florida oranges gift basket, etc. The signature gift may be delivered during any season.
- Offer free CPR Certification for referring doctors and staff. (Details below.)
- Refer patients back to your general dentists. (Details below.)

Free CPR Certification for Referring Doctors and Staff

We offer complimentary CPR certification for referring/potentially referring doctors and staff. I have used two formats and each has been equally successful. You may offer the CPR training in your office on a periodic basis or offer it in the referring dentist’s office. Your marketing team(s) will coordinate all aspects of this promotion.

1) Offer CPR in your office three times per year

- Each office will receive three mailed notices* announcing the dates, spread throughout the calendar year. All three dates will be included on the first notice. As the date passes eliminate it and list the following two dates, etc.
- Hire a CPR company and determine the capacity for the CPR educator and the limitations of your office space.
- Spread dates throughout the year for maximum convenience and exposure.
- Consider offering CPR in the referring doctor’s office when all three events are booked to the maximum.
- The benefit of offering CPR in your office is that referring doctors can familiarize themselves with your office and staff. This can be particularly effective if you have relocated to a new office or recently remodeled and wish to acquaint referral sources with your facility.

2) Offer CPR at the referring doctor’s office

- The benefit to this system is that the referring doctor can select dates convenient to him/her; however, the orthodontist will not receive as much exposure to the referral source.
- Send out three notices per year.*
- The referring office will complete the form and mail/fax it back to office. The Practice Rep will contact the CPR company and ask that a designated person select a date with the referring office. The CPR person will confirm dates with the Practice Rep. The Practice Rep will confirm with the referring office and the CPR person two days prior to the training.

Referring Back to the General Dentist

Thirty percent of our potential patients arrive for their initial consultation at our office without a general dentist. This may be due to a recent move, dissatisfaction with their current dentist, or a lack of interest in the health of the teeth (as opposed to interest solely in the aesthetics of straight, beautiful teeth).

I recommend that the orthodontist select a thorough list of referring dentists and contact them to cross-refer back to the dental office.

I sent a letter* that requested information regarding the dental office in order to make an appropriate referral (days, hours, insurances accepted, etc.). **Every** office that I mailed the request for information responded! I received numerous thank you notes and complimentary phone calls from the dental offices.

Mail the letter and organize the responses. Create a chart of the offices according to office hours, insurance, etc in order to expedite the referral process.

Designate the treatment coordinator as the only person in the office who is able to suggest a dental referral.

Create referral card* from your office to the dental office and hand that to the patient. Instruct the patient to hand the referral to the dentist. The treatment coordinator will also call the dental office and alert them that “Mary Smith” will be calling for an appointment. If the patient is prepared, book the appointment right from your office.

It is very important that all dentists who responded to the letter receive referrals. Track your referrals in order to maintain consistency.

The key to achieving your patient start goals lies in developing your marketing team. There is no greater asset to the growth of your practice than consistent strategies, an organized marketing system, and your dynamic team. ◊

* Samples of materials mentioned in this article are available from Nancy upon request.

About the Author



Nancy Hyman developed the Ortho Referral System exclusively for orthodontic practices wishing to increase patient, dental, community, and Internet referrals; as well as improve case acceptance and front office phone skills. Nancy has consulted with numerous practices and created the practice rep and marketing team concepts for Practice Builders. She may be reached at nancy@hymanortho.com or (323) 308-9817. Nancy will be presenting a marketing course at the 2009 Ortho2 Users Group Meeting.