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# A guide to getting new patients and referrals

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# A guide to getting new patients and referrals

## ABSTRACT

Every dental practice requires new patients and referrals to remain viable. Methods of gaining new patients and referrals include accepting dental insurance, internal practice marketing, and external marketing campaigns. The decision to accept insurance requires knowledge of types of insurance and contract evaluation. Internal marketing consists of satisfaction surveys, reward systems, and consistent communication. External strategies include advertising, accepting insurance, and social media presence. Technological advances, including automated patient recall systems, should be considered.

## EDUCATIONAL OBJECTIVES

At the conclusion of this educational activity, participants will be able to:

1. Identify different types of dental practice marketing.
2. Evaluate which types of marketing will work for each individual practice.
3. Tailor and implement a marketing strategy and evaluate its effectiveness.



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## INTRODUCTION

It goes without saying that patients are the lifeblood of any dental practice. While graduating from dental school and receiving a license to practice is the mandatory start, running a dental practice is often a messy, hands-on learning experience. Attracting and retaining new patients and winning patient referrals are sometimes more challenging tasks than finding that pesky MB2 root. Most dental schools address this challenge in their curriculum but not comprehensively enough to give the average student a comfortable start in private practice. After a few decades of experience running a private practice, it becomes clear which methods work best for each individual practice and dentist. Since every practice is different, and every dentist's goals are different, it is essential to tailor approaches according to individual situations. What works in some areas might not work as well in others. After completion of this article, readers should be able to identify which methods will work best for them, and which will not. Some methods that will be examined include accepting insurance, internal marketing, external marketing, and the use of technology. Each method has its benefits and drawbacks, and a combination of methods may be what works best for the practice.

## DENTAL INSURANCE

**Fee-for-service:** Dental insurance comes in many forms and policies. The traditional insurance policy often offers the highest degree of compensation for services and is also known as fee-for-service. The insurance company requests a copy of the office's fee schedule prior to affecting the policy, and a claim is submitted after the service is rendered. Often, there is an annual maximum coverage, and the patient may be billed for any uncovered services. While these policies are best for the provider, the availability of these policies to patients is dwindling as corporations seek to cut operating costs and maximize profits. It makes sense for most practices to accept most traditional dental insurance policies.

**PPO:** The next level of coverage is participation in a Preferred Provider Organization (PPO). This type of policy consists of a predetermined fee schedule that the dentist

must agree to in order to become a provider. These fees are often deeply discounted and may fall to just 50%–65% of the full fee. Each PPO contract will likely contain a clause forbidding the dentist to bill the difference to the patient. Some even contain a clause prohibiting the dentist from performing services that are not covered under the policy, so each contract should be carefully evaluated before agreement. Most basic services are covered; however, many procedures require preapproval from the insurance company prior to completion. Many companies have begun offering PPO policies in lieu of traditional insurance policies, and their prevalence has increased greatly.

**DMO:** Another form of dental insurance that patients can purchase is the Dental Maintenance Organization (DMO). This policy pays the provider a monthly fee for each patient who lists that provider as his or her dentist. The fee varies by location and is often in the \$8–\$15 range. The more patients on the roster, the more the dentist collects each month. While there is often an additional co-pay for services rendered, it is often very low and rarely covers overhead expenses. DMOs are now the most commonly carried type of dental insurance by patients and have the lowest monthly cost to the patient.

Accepting insurance will likely mean accepting a lower fee for services. This may seem counterproductive, but there are benefits that can translate into a healthy practice over time. Most patients who carry dental insurance through their employers are highly reluctant to go to dentists who are not in their network. By accepting insurance, an office will be placed on the list of participating providers that is given to each patient. If a dentist is new to the list, he or she will often be designated as a practice that is accepting new patients. This gives the dentist an important opportunity to get patients through the door and in the chair.

It may be financially and emotionally difficult to accept lowering fees, but the critical first step is getting patients through the doors. Remember, most patients have friends and families, and those friends and families may have better policies or no insurance at all. The goal is to get these patients to refer their families and friends. This won't happen

until they have experienced and appreciated the practice's services. Accepting insurance once doesn't mean the dentist must accept it forever. Once the dentist has met the obligations of the contract, the dentist is free not to renew the contract. Patients who are happy with their current providers will be reluctant to change offices. Many of them will inquire about alternative policies offered by their employers, and many of them will elect to pay out of pocket for services. Accepting insurance is undoubtedly the easiest way to attract new patients to the practice. It can be a great tool in building up a patient base that will become a source of referrals as the practice grows.

## INTERNAL MARKETING

Once patients walk through the door and into the chair, influencing their decision to refer friends and family is the next goal. In patients' minds, there are several factors that will contribute to this decision. Internal patient marketing is critical in swaying their decision to refer. Internal marketing does not mean badgering patients until they send a referral or pay for a new service. Internal marketing can be a subtle, suggestive approach that doesn't feel like a sales campaign to patients.

**Patient surveys:** Before beginning an internal marketing campaign, it is highly beneficial to learn which areas of the practice are already great and which need improvement. Patient feedback is a critical source of information. Feedback is usually more genuine if it is given anonymously. Patient surveys are an easy way to gain insight into the practice's strengths and weaknesses. They can be handed to patients at the end of the appointment with a self-addressed stamped envelope or can be requested electronically through text or email. Questions on the survey should reflect the areas of the practice that tend to generate the greatest number of referrals. Critical questions include opinions on office cleanliness, staff friendliness, perceived value of service, and, of course, likeliness to refer a friend or family member. Written feedback should also be encouraged although it is not required. Critical comments from patients should be expected and treated with gratitude. As the saying goes, a satisfied patient may tell one or two

people, but an unsatisfied patient will tell anyone who will listen. Once the practice is consistently receiving positive feedback, an internal marketing campaign should be considered and implemented.

Internal marketing campaigns focus on marketing techniques to existing patients. They can consist of thank-you gifts for each referral, recall reminder phone calls or text messages, or free services provided by the dentist. An overbearing internal marketing campaign can be counterproductive to gaining referrals. After all, patients want to feel like they are cared-for members of the practice and not a source of referrals and services. Once they identify a dentist as *their* dentist, they are already very likely to stay with that dentist for the duration of his or her career.

**Ask for referrals:** Asking for referrals is an important and often-overlooked source of gaining new patients. Asking for referrals is not the same as demanding referrals. The best time to ask for a referral is right after a patient makes a positive comment about the practice or services. It should be conversational in nature and not sound forced or scripted. For example, the dentist just placed four denture-stabilizing mini-implants in a patient with an edentulous mandible. The patient can now function with greater comfort and is highly satisfied. This would be the perfect time to inquire if the patient knows anyone else who is frustrated with a lower complete denture. Chances are they do know someone. If they say yes, hand them a business card and ask them to pass the card to that person. Or perhaps the dentist just gave a painless injection to the patient. The patient praises the dentist's technique. The dentist should respond with a pledge to always make each procedure as painless as possible. The message to the patient is that their dentist values their comfort. If that patient is in a conversation with a friend or family member who is complaining of a painful dental procedure, that pledge may compel a referral to the practice. Asking for a referral does not have to be a direct request. Giving patients the perception that the dental team is committed to quality and comfort to all patients will suffice.

If a patient follows through and gives a referral, a small token of appreciation is often welcomed by the patient. This should be an

unadvertised gesture. The dentist is not trying to purchase referrals and does not want to give the impression that the practice is trying to recruit practice representatives. A referral is far more valuable if it is given by a friend or family member. A surprise gift card to a local coffee house sent to the referring patient will elicit more gratitude than an expected reward.

**Freebies:** Free services are a highly effective method of internal marketing that can bring a considerable return on investment. If a patient comes in with a very minor problem, such as a small chip in a lower incisor or a subgingival popcorn hull, consider smoothing that chip or removing that hull for no charge. In general, the patient will be highly appreciative of the gesture, gain respect for the dentist's ethics, and refer family and friends. The cost of writing off a minor visit is a small investment compared to the trust gained by the patient. Trust is one of the most important factors that influences a patient's decision to refer friends or family members to a practice.<sup>1</sup>

**Office cleanliness:** While office cleanliness may not be an obvious method of internal practice marketing, studies show that cleanliness ranks high on patients' impressions of a practice. Patients tend to associate cleanliness with sterility and feel more comfortable in a clean and orderly environment.<sup>2</sup> Delegate a team member as the cleanliness inspector to evaluate the restrooms and reception area throughout the day. It is recommended to have the office cleaned weekly by a professional cleaning company. Magazine subscriptions in the reception area can end up cluttering the office and giving patients a poor impression of the practice. Instead, consider offering free Wi-Fi and give patients the password.

**Unexpected services:** A service provided at no charge is a highly memorable gesture that can help differentiate a practice in an area saturated with dental providers. Differentiating a practice in a unique way will help generate referrals from patients who are pleasantly surprised by the practice's creativity. Whether it is a virtual reality headset in the reception area, a cardboard selfie cutout of a favorite celebrity, or a massaging chair, an unexpected touch will make the visit to that particular practice a memorable

experience for the patient. This may be the deciding factor in the patient's decision to tell others about the practice.

**High-tech communication:** In today's world of social media and instant communication, staying in touch with patients is critical for maintaining a relationship that will lead to additional patient referrals. Delegating this task to the office team is neither efficient nor cost-effective. There are many companies that offer this service for a nominal fee. These companies use text messaging and social media to remind patients of their appointments, automatically remind them of approaching recalls, request patient feedback after visits, and even send them birthday cards. These services save hours of front desk time, and studies show a correlation between reminders and kept appointments. Since feedback from patients is requested promptly after appointments, this valuable information will help dentists understand the areas in their practices that could be improved and decrease investment in areas where they are already succeeding. This service will demonstrate mastery of technology to patients, which is a critical factor in the decision to recommend the practice to others.

## EXTERNAL MARKETING

External marketing of the practice consists of advertising via the internet, print media, and television or radio commercials. The effectiveness of commercial advertising is highly dependent on the exposure and viewership of the advertisement. Depending on the choice of media, commercial advertising can become an expensive proposition. It is highly recommended to gain an understanding of return on investment before undergoing an advertising campaign. Studies on the effectiveness of advertising show a direct correlation between exposure and response. Advertising works if the dentist is willing to commit to a long-term, highly repetitive campaign.<sup>3</sup> Advertising professionals are readily available to design an effective marketing campaign. With the advent of the internet and social media, a strong internet marketing campaign can give access to targeted advertisement placement without the high cost of radio or television. Many social media advertising outlets feature easy-to-use

tools that require minimal training to implement. Facebook advertising allows dentists to decide which locality and demographic sees their advertisement. This feature spares the expense of blanket marketing and tailors ads to those most likely to respond. Every practice should have a social media presence that is active and engaging. Along with easy access to communication with the patient base, it gives patients the impression that they are part of the practice's inner group. Studies show that millennials respond to the personal attention provided by social media.<sup>4</sup>

**Reviews:** The influence of social media and internet reviews should not be underestimated. As part of an external marketing campaign, online reviews should be checked frequently. Most dentists will get an occasional negative review. While it is tempting to confront a negative reviewer, HIPAA regulations limit the ability to counter negative reviews. It is wise to confirm the validity of the reviewer as there are many nefarious actors on the internet who post negative reviews for unethical reasons. If a negative fake review is found, contact the hosting website immediately and request removal. Be sure to balance any negative online reviews with overwhelmingly positive ones. It is acceptable to request a positive review from a highly satisfied patient. A negative review, while unsettling, can actually work in the dentist's favor. If potential patients see only positive five-star ratings on a practice, they will likely get the impression that the reviews are compromised. A negative review will give validity to all of the positive reviews.

**Advertising low-cost services:** Examples of practices advertising low-cost services are plentiful. Ads that contain discounts will often get the most responses from those seeking a single, low-priced visit or service and nothing more. It is often difficult to explain to patients who need comprehensive periodontal therapy why the \$99 special is insufficient. Advertise aspects of the practice that reflect the type of relationship the practice hopes to develop with patients. A well-run practice that is thorough, efficient, and technologically advanced may be more appealing to patients who have the highest dental IQ.

**Mailings:** Another form of external

marketing that should be considered is mailed advertisements. While the majority of these ads will end up in the trash, a carefully targeted mailing campaign may be an effective tool to recruit patients. Mailing lists for specific areas can be purchased from online sources or packaged with an ad by an advertising company. If a practice is located in an area of rapid growth or migration, targeting new arrivals to the area will provide optimal results. These advertisements are often in the form of welcoming the person to the area, an introduction to the practice, and an incentive to appoint. If the practice has received positive reviews on the internet, be sure to mention this in the introduction. Positive internet reviews are a strong influencing factor in a patient's choice of practice.

**Evening hours:** As dental professionals continue to grow in numbers, attracting new patients becomes more and more competitive. Established dental practices with limited available appointments may find it difficult to accommodate dental emergencies. This can provide less established offices with an opportunity to quickly gain patients in their hour of need. Studies show dental emergencies often occur in the evening as cortisol levels decrease. Offering evening hours may provide an excellent source of new patients for the practice. Although it may involve sacrificing time with family, evening hours can be limited to a few days per week. If an office decides providing evening hours is beneficial, they should inform local dentists of their availability. Established practices in the area might be happy to have a source of care for after-hour emergencies. They may even be willing to provide contact information to their patient base.

## CONCLUSION

After careful analysis of the practice and its capacity for growth, implementing a strong patient referral system will bring exponential growth. The internal marketing strategies outlined in this article are easily implemented with minimal cost. Depending on individual circumstances, trial and error may be required to understand which ones work most favorably. External marketing campaigns require a greater financial investment and should be well outlined before

implementation. Technology will aid both internal and external campaigns by reducing costs, minimizing effort, and maximizing exposure. A combination of methods will often produce the greatest results. As the patient base grows, the practice will likely receive more referrals in conjunction with that growth. Deciding when to begin or end a campaign is based on capacity to treat new patients. If these methods are implemented successfully, dentists can get back to doing what they do best—delivering expert care to patients.

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### FADY HADDAD, DDS,

graduated from University of Maryland School of Dentistry in the class of 2000. Since that time, he has developed a renowned and respected private practice. Dr. Haddad is an accomplished author of continuing education courses. He is a loving father and husband, with two children. He enjoys playing guitar and scuba diving in his spare time.

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## QUESTIONS

**1. Methods used to gain new patients include:**

- A. Internal marketing
- B. External marketing
- C. Technological advances
- D. All of the above

**2. Types of dental insurance include:**

- A. PPO
- B. DMO
- C. Traditional insurance
- D. All of the above

**3. Dental Maintenance Organizations:**

- A. Pay a fee for every service
- B. Pay a monthly patient listing fee
- C. Pay 100% of the dentist's fee schedule
- D. Are no longer available

**4. Accepting dental insurance:**

- A. Is required by law
- B. Is the only way to get patients
- C. Puts your practice name on a list of current providers
- D. Requires a lifelong commitment

**5. Internal marketing:**

- A. Should be constant and relentless
- B. Is the most expensive form of marketing
- C. Should be attempted as a last resort
- D. Should be subtle and suggestive

**6. Patient satisfaction surveys should:**

- A. Be ignored
- B. Be given to every patient
- C. Be used to determine areas that need improvement
- D. Never be mailed to patients

**7. Patient questionnaires should ask:**

- A. About office cleanliness
- B. About staff friendliness
- C. About perceived value
- D. All of the above

**8. Thank-you gifts for referrals:**

- A. Should never be given
- B. Should be over \$100 in value
- C. Should be a small token of appreciation
- D. Are expected by all patients

**9. The best time to ask a patient for referrals is:**

- A. During the appointment call
- B. During a complex procedure
- C. After the patient praises your practice
- D. Three weeks after the appointment

**10. A pledge of quality to your patients:**

- A. Is counterproductive
- B. Will help build trust
- C. Will encourage referrals
- D. B and C

**11. Providing free services:**

- A. Is a liability
- B. Will ruin your practice
- C. Will be remembered fondly by the patient
- D. Is not recommended

**12. A free service will help build:**

- A. Patient trust
- B. Patient awareness
- C. A strong referral base
- D. A and C

**13. Office cleanliness is an example of:**

- A. External marketing
- B. Internal marketing
- C. A well-trained team
- D. Good dentistry

**14. In lieu of magazines:**

- A. A free Wi-Fi password should be offered
- B. Coffee should be made available
- C. An electronic tablet should be offered
- D. No entertainment should be considered

**15. Differentiating your practice:**

- A. Is not necessary
- B. Will reduce referrals
- C. Will make your practice more memorable
- D. Is prohibited by ADA standards

**16. Social media:**

- A. Is rarely utilized by patients
- B. Violates HIPAA regulations
- C. Should be attempted only by professionals
- D. Is vital to internal and external marketing campaigns

**17. Appointment reminders:**

- A. Are best delegated to the front staff
- B. Are a form of external marketing
- C. Are annoying to patients
- D. Reduce no-show rates

**18. Forms of external marketing include:**

- A. Television
- B. Radio
- C. Print media
- D. All of the above

**19. Advertising your practice:**

- A. Is ineffective
- B. Works best with consistent repetition
- C. Is cost-efficient
- D. Will generate suspicion

**20. A discount coupon:**

- A. Is strongly suggested
- B. Will likely bring long-term patients
- C. Builds patient trust
- D. Should be avoided

**21. Social media campaigns:**

- A. Are expensive
- B. Are difficult to implement
- C. Are a form of targeted marketing
- D. Do not require frequent updates



# A guide to getting new patients and referrals

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Specialty: \_\_\_\_\_

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- Identify different types of dental practice marketing.
- Evaluate which types of marketing will work for each individual practice.
- Tailor and implement a marketing strategy and evaluate its effectiveness.

## COURSE EVALUATION

1. Were the individual course objectives met?

Objective #1: Yes No Objective #2: Yes No

Objective #3: Yes No Objective #4: Yes No

Please evaluate this course by responding to the following statements, using a scale of Excellent = 5 to Poor = 0.

2. To what extent were the course objectives accomplished overall? 5 4 3 2 1 0

3. Please rate your personal mastery of the course objectives. 5 4 3 2 1 0

4. How would you rate the objectives and educational methods? 5 4 3 2 1 0

5. How do you rate the author's grasp of the topic? 5 4 3 2 1 0

6. Please rate the instructor's effectiveness. 5 4 3 2 1 0

7. Was the overall administration of the course effective? 5 4 3 2 1 0

8. Please rate the usefulness and clinical applicability of this course. 5 4 3 2 1 0

9. Please rate the usefulness of the supplemental bibliography. 5 4 3 2 1 0

10. Do you feel that the references were adequate? Yes No

11. Would you participate in a similar program on a different topic? Yes No

12. If any of the continuing education questions were unclear or ambiguous, please list them.

\_\_\_\_\_

13. Was there any subject matter you found confusing? Please describe.

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