



Team Activity

Team Activity

Series 1 The Fundamentals

Session 11 Multiplying Quality Patients

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1. Make a copy of this worksheet for each team member to use.
 2. Complete the Team Activity.
 3. Fax or email one “Master Worksheet” containing your team’s collective efforts.
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Send Us Your Master Worksheet

Fax
615-807-3301

Email
Champions@DentalSuccessToday.net

Team Activity

Step 1 The Four Cornerstones of Referrals

Review the Four Cornerstones of Referrals before assessing your current referral strategies.

The Four Cornerstones of Referrals

Incorporating Referrals Into the Patient Experience

This includes three different moments throughout the Patient Experience. The first is on the new patient phone call, encouraging the patient to bring somebody in with them. The second is on the exit, turning the referral into a “privilege” for the patient by creating a gifting strategy. The third is the family audit, making sure all family is up to date on exams and hygiene, and asking if there are any other family members you should be seeing that you’re currently not.

Inside Out: The Center of Influence Strategy

This is about connecting with your patients who have influence over others to create Healthcare Partnerships. Examples would be: patients who are doctors, are married to doctors, are kids of doctors, are healthcare professionals, teachers, administrators, HR professionals, executives or business owners, and anyone in the fitness or beauty fields.

Tip

Take this strategy further by using the Reverse Referral. Ask each patient to share who their trusted physicians and healthcare professionals are with you. Then, you can reach out to those professionals to notify them you have a patient in common, update them on the patient’s care, and say you’d like to learn more about what they do so you can be an advocate for them.

Outside In: The Community Strategy

This is about maintaining relationships with the businesses around you. Examples would be: cosmetic surgeons, sleep centers, EMTs, day cares, kid centers, tutoring centers, schools, assisted living, nursing homes, and retirement communities.

Referrals By Education

This is usually done through events. Examples would be: patient appreciation nights, seminars, lunch and learns, community events, and educating patients through video testimonials.

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Step 2 Assess How You're Doing and Take Action

After listening to the referral strategies in the Practice Focus and reviewing the Four Cornerstones of Referrals outlined in Step 1, assess how you're currently doing and take action steps to improve at cultivating referrals going forward.

Incorporating Referrals Into the Patient Experience

Review your referral strategy. What can you do to increase referrals using this cornerstone?

How can each team member get involved? Set specific goals together.

Example: going forward, all assistants will ask, *"Is there anyone else in your family who we should be seeing that we're currently not?"*
