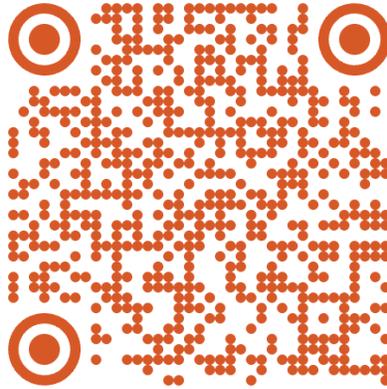




Team Activity

Team Activity



Series 9 / Session 9

Creating Patient Ambassadors

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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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Team Activity

Step 1 Systemizing

In our personal lives, where and with whom can we be our own ambassadors?

What protocols do we currently have in place to cultivate high quality referral conversations?

Team Activity

Where are we currently getting referrals from?

How can we expand our partnerships and widen our referral network?

Which of our patients are the very best at referring to us?

Team Activity

Step 2 Treating the Whole Family

What verbiage can we all commit to using to ask for and secure the couple's consult?

How can we fully leverage each couple's consult to maximize its value for everyone?

Team Activity

How can we be more intentional about our efforts to treat the whole family?

What are our referral protocols as they relate to patient age (us moving “up or down”), procedures and specialist partners?

Team Activity

Step 3 Centers of Influence

Where do our patients go outside of the practice that would likely attract like-minded people?

What patients of ours are doctors, are married to doctors, work with doctors, or are closely connected with another doctor who'd be a high-value referral source?

How are we going to make a connection into those centers of influence?

Team Activity

Step 4 Testimonials

How can we create a place and protocol in our practice for patients to “check in” on social media?

How can we create a place and protocol in our practice for us to capture testimonials?

What initiatives can we run to encourage a proliferation of reposts on social media, as well as an influx of new testimonials?

What verbiage will we use to ask for and encourage patient participation in those initiatives?

Team Activity

Step 5 Taking Action

Let's cast the vision: what's our definition of a patient ambassador?

What would we say our referral approach is right now, and what do we want it to be?

How can we go all in on creating patient ambassadors and make things easy, fun, and memorable?

Team Activity

Who are the top 10-20 patients we're going to connect with with to immediately expand our influence?

What are the top 5-10 businesses we're going to connect with with to immediately expand our influence?

How are we going to accomplish this; what's our action plan and verbiage?

Team Activity

How can we further leverage our testimonials and current marketing materials?

Who will champion ensuring that our referral systems are running like a well-oiled machine?

Do we have any more notes about our commitments to thinking big, acting boldly, and being proud of involving our patients in the mission: helping our community be happy and healthy?

We're no longer the best-kept secret...we're the proudest promoters and our patients love helping us!