

Marketing Plan for New Physician Practice

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Month 1

- Draft and submit news release about physician
- Order announcement cards on opening the practice
- Establish mailing list – physicians, businesses, professionals, other health care providers
- Select and order practice letterhead, business cards/appointment cards
- Order name tags and uniforms for employees
- Is your practice on Google®? Check accuracy of Google® Maps™, phone numbers, address information on Internet
- Take a tour of hospital, meet the staff, attend Medical Staff meeting

Month 2

- Conduct an Open House or a “get acquainted” appointment hour
- Draft and submit newspaper or magazine advertisement
- Implement patient satisfaction ideas for waiting room
- Develop survey for patient satisfaction
- Draft and print practice brochure
- Consider placing ad in local phone directories, Internet search engines – talk with physicians who have done these types of advertising, and make a decision on best value for cost

Month 3

- Accumulate and order patient education materials for specialty
- Begin emailing appointment confirmation notes to new patients
- Implement policy of telephone follow-up to new patients asking how they are doing regardless if medically necessary
- Accumulate written materials for distribution to potential referring physician offices, other health care providers and non-health care providers in the area
- Conduct training to office staff on communications to patients, referring physicians and referring physician office staff

Months 4-6

- Set up system to track how patients are referred to the practice
- Select and order miscellaneous handout items for patients in the office
- Physician commit to community involvement activities
- Setup patient recall system
- Place “Thank You for Referrals” notice in your waiting room and other marketing plaques
- Send thank-you notes to referring patients and other sources
- Write and publish article in physician-specific media, or article for the general public

- Physician and/or office staff plan to participate in health fairs and screenings sponsored by hospital and other organizations
- Contact local organizations to speak on a specific topic

Months 7-12

- Send thank-you notes to patients who refer others
- Survey referring physicians
- Conduct patient satisfaction survey
- Consider participation in local radio or local television program

If another hospital is preferred, we will be glad to refer your care to another doctor who does make visits at the hospital of your choice.

YOUR REFERRALS

We know that the referral of your friends and neighbors to our practice is our highest compliment we can receive, and we sincerely appreciate your recommendation. Be assured that our doctors will always make time for a new patient.

Your Appointment

Our Doctors and staff welcome you to our office, and we look forward to caring for you and your family. Use the following section to confirm your appointment time.

Mr./Ms. _____

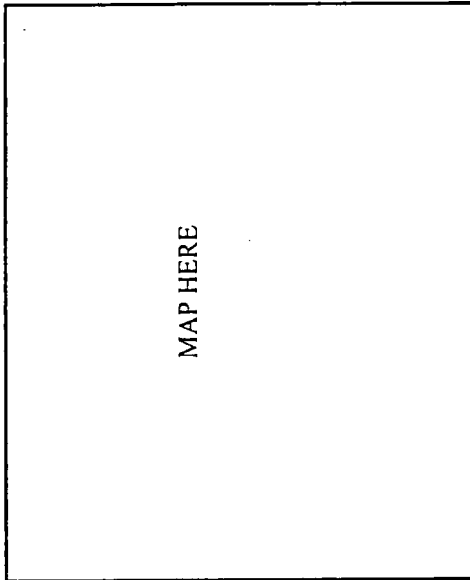
has an appointment with:

- John Jones, M.D.
 Steve Smith, M.D.

Mon Tues Wed Thurs Fri Sat

Date _____ Time _____

How To Find Us



WELCOME

TO OUR
PRACTICE

**NAME OF YOUR PRACTICE
OR CLINIC**

John Jones, M.D.

Steve Smith, M.D.



**Specializing In
Internal Medicine**

**John Jones, M.D.
Steve Smith, M.D.**
Your address here
City, State, Zip
Your phone here

Professional Office Located At:

Your address here
City, State, Zip
Your phone here

ABOUT OUR DOCTORS

Our Physicians are trained in internal medicine which means they specialize in the diagnosis and treatment of illnesses for adults. The types of illnesses treated include stomach and colon disorders, heart disease, arthritis, diabetes, glandular conditions, disorders of the nervous system, disease of the lungs and bronchial tubes and respiratory conditions.

An internist can be your family doctor and handle the majority of your health care needs.

Our doctors and staff strive to offer the highest quality of health care possible. Our physicians are highly skilled, and they continually update their medical knowledge.

APPOINTMENTS

Patients are seen on an appointment basis. Please make an appointment for all office visits. Appointments can be made by calling 800-8888 from 8:00 a.m. to 5:00 p.m. Monday through Friday. Please describe your problem to the receptionist or nurse so that a convenient appointment can be scheduled for you and your doctor. If you have a medical problem that needs immediate attention and cannot wait for an appointment, we will work you in for an office visit.

If you are unable to keep an appointment, please notify the receptionist as soon as possible. As an aid to us in providing you complete services and for your safety, at each appointment please bring all your medications that you are taking including prescriptions and over the counter medications. Please bring a list of your concerns to discuss with the doctor.

We try to see you at the appointed hour. We believe strongly in the value of your time and will do our best to keep you from have to wait for a long period of time.

TELEPHONE CALLS PRESCRIPTION REFILLS

The telephone is answered during regular office hours. Our employees are instructed to handle all incoming calls. The doctors are usually very busy seeing patients and our nurse has been trained to answer most questions. This is to ensure each patient's time with his/her physician. When you call our office and ask us to return the call to you, we try to do so on a timely basis. It is helpful to advise us of a telephone number where you can be reached both during the day and after hours.

When you need to renew a prescription, call the office during regular office hours. Sometimes prescription refill requests appear simple, but may require an examination or new instructions.

FEES AND PAYMENT

Office Visits: We make every effort to control the cost of our services. An important way we accomplish this is by eliminating the need for mailing statements. Therefore, we request payment at the time of your visit. You may pay by cash, check or charge card.

Insurance: You will receive a copy of your bill showing the diagnosis and treatment rendered. Attach this form to the signed insurance claim. We will be glad to provide additional assistance.

Medicare: If you are a Medicare patient, your charges will be billed to Medicare by this office, and we will accept assignment of benefits. You are required to have a valid Medicare identification card in your possession at the time of your visit.

You are responsible for your deductible and expected to pay for any charges that Medicare does not cover.

HMOs/PPOs: Our doctors are participating members of the Blue Cross Preferred Health Plan.

HOSPITAL CHARGES

Private Insurance: We accept assignment for benefits for all in-patient charges and we will bill your insurance company. You will be notified of any balance due after your insurance pays.

Medicare: Our doctors accept assignment for all in-patient charges. This means that Medicare will pay us directly for 80% of their allowable charge. If you have supplemental insurance, we will bill them for the remaining 20% balance. Otherwise, you are responsible for the balance, as well as for your deductible. If you have secondary insurance, it is necessary that you submit directly to the carrier.

Payment Arrangements: If payment in full is not possible, please contact our office and one of our staff will work out a payment plan with you.

AFTER HOURS

For medical problems after regular office hours, a physician may be reached by calling our answering service at 800-888. They will instruct how the doctor may be reached. If it is a true emergency, proceed to the nearest hospital emergency room where the physician on duty will begin treatment and notify your doctor.

OFFICE HOURS

Monday 8:00 a.m. – 5:00 p.m.
Tuesday 8:00 a.m. – 6:00 p.m.
Wednesday 9:00 a.m. – 5:00 p.m.
Thursday 8:00 a.m. – 6:00 p.m.
Friday 9:00 a.m. – 5:00 p.m.

HOSPITALIZATION

Our doctors are on staff at XXX Hospital Center and XXXXX Regional Medical Center. They can admit you and make daily visits.

Practice Enhancement Ideas For The Waiting Room

1. Recently dated magazines including variety for all ages.
2. Soft music.
3. Lamps with soft lighting.
4. Health literature display.
5. Telephone for visitor's use (can be installed to prohibit long distance calls).
6. Tropical fish aquarium.
7. Operate video tapes on health topics or other interesting subjects.
8. Display a hobby - seashells, stamps, etc.
9. Bulletin board with photos of children or other patients, drawings by patients, calendar of local important events.
10. Place sign that says, "If you have been waiting 20 minutes or more and don't know why, please advise the receptionist".
11. Refreshments - coffee, tea, juice in the waiting room.
12. Display in a frame those statements on your philosophy of care or standards of patient service that your practice follows.
13. Plants and flowers.
14. Single seating with arm rests.
15. Children's corner with small seats, books and a few play items.
16. Attractive wall pictures.
17. Small games or health guides that patients can occupy their time.
18. Place a framed picture of the physician with a biographical sketch including medical credentials.
19. Display originals or copies of medical diplomas.

Telephone Techniques For Good Patient Relations

Screening Calls

1. When the doctor or staff members are accepting calls, but want to know the patient's identity:

"May I tell her who is calling, please?"

2. If the doctor or staff members are available to take only certain calls:

"He is with a patient. May I tell him who called?" (The call can then be returned.) Next you might add, **"He just walked out of the examination room,"** (if it is a person with whom the doctor wants to talk.)

3. When the doctor/staff member is on another line:

"Miss Brown is on another line. Would you prefer to hold, or may I take a message?"

4. When an unknown caller asks for the doctor:

"Dr. Waters is with a patient. How can I help you?"

Ways to ask patients to hold

1. **"Mrs. Anderson, it may take a few minutes to locate those forms. Would you rather have me call you back than keep you waiting?"** (Wait for a response) **"Thank you."**
2. **"Would you hold while I tell Mrs. Martin you are on the line?"** (Wait for a response) **"Thank you."**
3. **"My other phone line is ringing. Would you hold please?"** (Wait for a response.) **"Thank you."**
4. **"The doctor is on another line. Will you hold or may I take a message?"** (Wait for a response.) **"Thank you."**

A Better Way to Say It

Wrong Way

1. "You're wrong."
2. "Any questions?"
3. "We had a cancellation."
4. "I'll squeeze you in."
5. "I don't know where the office manager is."
6. "We expect full payment of the bill when you come in."
7. "The results aren't back yet. Why don't you call us back in a couple of days?"
8. "It's okay. It's all part of my job. Bye now."
9. "I'm sorry, ma'am. We don't see patients with your problem. You'll have to try"
10. "It took me a while, but I found it."
11. "I'll tell him when I see him."
12. "Well, if you can't talk now, call me back."
13. "She is out of town."

Right Way

- "I can appreciate how you feel."
"Is there anything you would like for me to explain further?"
"Just a moment. Let me check the schedule. (Pause) Yes, we had a patient who needed to change his appointment. Dr. Wright can see you at 4 p.m."
"Mrs. Jones, we can work you in today's schedule."
"The office manager is not at her desk."
"The fee for your first examination is \$40. We do ask our patients to pay at the time of their visit, Mrs. Adams."
"The results of your test will be here on Wednesday. I would be happy to phone you, or would you prefer to call?"
"Thank you for calling, Mr. Henry. I am happy that I was able to help you."
"I am sorry; Dr. Johnson is a cardiovascular surgeon who only sees patients on referral. May I refer you to one of Dr. Johnson's associates who is an orthopedic physician? I would be pleased to examine your son's ankle."
"Thank you for waiting. I have your chart."
"I'll give Dr. Jones a message."
"Would you prefer to call me back to discuss this at a more convenient time?"
"Dr. Bell is not in the office today. How can I help you?"

Standards Of Patient Service For Medical Office Staff

1. Acknowledge patients promptly and courteously with eye contact and a pleasant expression and tone of voice.
2. Use words that express respect, patience, and understanding when talking with patients and/or other employees.
3. Care for people with kindness and gentleness, rather than with roughness and cold professionalism.
4. Address adult patients by their proper title and last name, unless the patient requests otherwise.
5. Display visible identification and introduce yourself by name and title when first meeting a patient.
6. Answer the telephone quickly and courteously, identify yourself by name. Provide callers the opportunity to respond to a request to be placed on hold, and explain if their call is being transferred.
7. Be sensitive to reducing noise levels near patient care areas.
8. Respect patient privacy by knocking before entering a patient room if the door is closed, and by refraining from discussing one patient in front of another.
9. Protect the confidentiality of patients, co-workers, and others who use our facilities.
10. Make certain that patient modesty is respected at all time.
11. Be attentive to patients and their families who are kept waiting in waiting areas or treatment rooms for extended periods of time.
12. Consider the effects of what they say and do in the presence of patients. Refrain from conducting personal (not work-related) conversations in front of patients.
13. Refrain from discussing other employees, organizational policies, problems, or medical care in public areas.
14. Maintain and use medical equipment and facilities in an appropriate and cost-effective manner.

Tracking New Patient Referral Sources

Month of _____

<u>Referral Source</u>	<u>Patients Referred</u>	<u>Total</u>
1. Area Physicians		
2. Physician Associate		
3. Patients (past or current)		
4. Hospital E. R.		
5. Hospital Referral Service		

<u>Referral Source</u>	<u>Patients Referred</u>	<u>Total</u>
6. Speaking Activity		
7. Teaching Activity		
8. Employer/Business		
9. Yellow Pages Phone Directory		
10. Advertising		
Newspaper		
Journal/Magazine		
Radio		
Other		
11. Saw Practice Newsletter		
12. Saw Practice Brochure		
13. Health Care Plan Referrals (HMO, PPO, etc.)		
14. Other		

Physician Practice Newsletter – What It Should Include

- √ Make sure it has a local community look.
- √ List services & information on treatment of symptoms, not excessive medical terminology.
- √ Include subjects on wellness & prevention.
- √ Appeal to women.
- √ Include calendar of relevant health events (screenings, fairs, etc.).
- √ Use clever name, address and phone number in bold print, preferably with practice logo.
- √ Include location, preferably map.
- √ Include human interest stories.
- √ Write about and involve all medical office staff.
- √ Emphasize availability - office hours and after hours.
- √ Information on new treatments.
- √ Include answers to frequent questions from patients.
- √ Use article written by physician if non-technical and brief.
- √ Use photos when possible.
- √ Write about achievements of physician and office staff (certification, completion of educational courses, etc.)

Patient Survey Questionnaire

We wish to give you competent medical care and make our relationship mutually satisfying. To help us reach these goals, please take a few minutes to answer the questions below. Mail your reply back to us in the accompanying stamped, addressed envelope. Be honest! This is your chance to speak your mind. You need not sign this questionnaire.

1. When you telephoned our office, did receptionist answer courteously? Yes ___ No ___
Comments: _____
2. Have you ever telephoned our office and received no response? Yes ___ No ___
If yes, at what time of day? _____
3. Did you receive an appointment within a reasonable length of time? Yes ___ No ___
4. Upon arrival, did you find a convenient parking space? Yes ___ No ___
5. Did you have difficulty locating our office? Yes ___ No ___
6. Upon arrival, did the receptionist greet you courteously? Yes ___ No ___
Comments: _____
7. Are the chairs and furnishings in our reception room satisfactory? Yes ___ No ___
8. Did you like the selection of magazines in our reception room? Yes ___ No ___
9. Were our assistants courteous, pleasant, helpful, and efficient? Yes ___ No ___
Comments: _____
10. Were our assistants neat in appearance and dress? Yes ___ No ___
11. Upon arrival, how long did you wait before beginning the examination? _____
If it was a long time were you given a reason for the delay? Yes ___ No ___
Comments: _____
12. Were you satisfied with the level of care and attention you received? Yes ___ No ___
Comments: _____
13. How would you rate the doctor on his patience, warmth, and interest in your problem?
Outstanding ___ Good ___ Hurried ___ Poor ___ Comments: _____
14. How would you rate the doctor on professional thoroughness in the examination?
Meticulous ___ Average ___ Poor ___ Comments: _____
15. After hours, have you ever had difficulty in reaching the doctor in an emergency?
Yes ___ No ___ Comments: _____
16. Did you understand the doctor's explanation of the results of your office visit?
Yes ___ No ___
17. Did you have difficulty understanding our insurance form and statement? Yes ___ No ___

Any suggestions you may have about service in our office will be appreciated. Please feel free to comment on any topic. Use the reverse side of this form if you wish.

Date _____ Signature (optional) _____

Patient Recall System

1. At the time of the patient's visit have them address an envelope to themselves. The envelope contains a reminder card, which is already inserted. The reminder card says: "Please call the office for your examination. The doctor thinks this is important for your continued well being."
2. At the top right corner of the envelope, where you will eventually place a postage stamp, you will put a code indicating when the patient is to come back and when the patient was last seen. For example, 6/12 means the patient is to be back in June and was last seen in December; 6/3 means the patient is to be seen in June and was last seen in March. Obviously, the higher priority, for recall purposes, would be given to the patient who's coming in after 3 months.

All envelopes with a 6 on the numerator are placed in a June storage box, to be mailed in May. Starting in early May you could send out reminder mailings to those patients who have the higher priority, i.e., 6/3, 6/4 as compared to 6/6 and 6/9. A postage stamp is placed over the code numbers.

Patient appointment reminder cards are not all sent out in one big batch. Send out a few each day so you are not deluged with phone calls.

3. Every envelope going out of your office should have the following three word message below your return address – "ADDRESS CORRECTION REQUESTED". Envelopes having this message instruct the post office to provide you with a new mailing address (for a fee of 25 cents) should the patient have moved. It would help you to have this information.
4. If see a patient is very important and you are concerned about the possibility of mailing out a reminder card and not hearing from the patient, there is something you may wish to do. The simplest thing you could do is to buy colored, self-adhering dots, one-half to one inch in size, that could be affixed to the edge of the patient's file folder. A small green dot could be used for the month of June, for example. When that June patient comes in, the receptionist peels the dot off the chart. At the end of the month of June, if you see any charts that still have small green dots affixed, you would pull them and call the patients to get them in, or send them a second reminder.

Thank You Letters/Cards To Referring Sources

Dear Mr./Mrs. Patient:

Over the last few months several patients have told me that they learned about our practice through you.

My office staff and I appreciate your confidence in us and value your thoughtfulness in referring your friends and family to us. We'll do our best to live up to your expectations.

Sincerely,

Charles Jones, M.D./D.O.

Thank You Letter to Referring Source

Dear Nurse:

We at Dr. Jone's office value our relationship with you and referrals you make to us. Sometimes, we may forget to send a formal thank you, but be assured that each time we see one of your patients, we appreciate the confidence you've placed in us.

Please let me know if there's anything we can do to improve our services with regard to appointment times or reports.

Sincerely,

Office Manager

Thank You Card

Thank you for giving us the opportunity to be of service to you. Our staff will constantly strive to earn your continued confidence.

My card is enclosed. Please feel free to call on me whenever I can be of further assistance.

Once again, thank you.

John Jones, M.D.

Factors To Consider In Developing Patient Referrals From Other Physicians

Physicians consider the following in selecting a consultant to refer to:

Care-Related Factors

- * Quality of patient management: thoroughness of workup and accuracy of staging; thoroughness of problem/treatment explanation to patient/family; thoroughness and efficiency of treatment; comprehensiveness of rehabilitation.
- * Patient results: how patients look; complication rates; pre-, during and post-treatment mortality rates; cure rates.
- * Individualized patient management and care: management and care of the patient provided according to the specific needs and condition of the patient in a friendly, empathetic, personal manner.

Patient/Family-Related Factors

- * Cost to patient: travel expenses incurred by the patient/family in traveling to receive care, including food and lodging; other expenses involved, e.g., babysitting cost, lost wages; out-of-pocket expenses for care.
- * Convenience to patient: distance; degree of physical discomfort involved in traveling; ease in locating where to go and parking; availability of suitable accommodations nearby; extent of disruption of patient's family life.
- * Degree patient's preferences are met: expressed patient preferences regarding consultant; convenience, such as distance or ability to stay with family or friends; costs.
- * Previous use of and satisfaction with consultant by patient/family: Patient/family having used consultant for same related or nonrelated problems and their level of satisfaction with the consultant.

Referral Physician-Related Factors

- * Physician's loss of patient and/or income: Patient not returning to referring physician for care; consultant performing procedures that physician could perform.
- * Reciprocations physician receives: what the physician may gain by referring patients to the consultant, i.e., education, consultant coming to hold special clinics to train personnel in special procedures, patient referrals.

Questionnaire To Referring Physicians

1. Do you believe that you're aware of all services offered by this practice?
4. Is our office location convenient to the patients you refer?
5. Are you able to reach us conveniently by phone?
6. Are you and your staff satisfied with the assistance provided by our office staff?
7. Are you able to schedule an appointment for the patients you refer at a convenient time?
8. Are you able to schedule an appointment as soon as you would like?
9. Do you feel that we are as available and responsive to you as we should be?
10. Do we keep you as informed as you would like to be regarding the diagnosis and treatment of your patients?
11. Are our written reports on the diagnosis and treatment plans for your patients satisfactory?
12. Do you feel that we maintain sufficient personal contact with you regarding your patients?
13. Would it be useful to you if we provided you with periodic written reports on advances in our specialty areas?
14. Do you feel that your patients are being referred back to you promptly?

If the positive response level to a question is not at least 90%, remedial steps are in order. In fact, you should consider a 95% positive response the norm for a well-run practice.