



Practice Development Program: Patient Reactivation

OVERVIEW

It is far easier to keep your current patients active than to work to get new patients. Although you always have to work on new patient acquisition, an aggressive patient retention program can help lessen your dependency on new patients. Further, your past patients form a pool, largely untapped, from which to generate new patients from their family, friends, and work associates.

This program is designed to help return your old patients, and generate more referrals. It can be twice a year, or more frequently as needed.

PURPOSE

1. To get inactive patients active again by getting them back into the office for a check-up, and then onto their old treatment program, or on to a new one, as appropriate.
2. To provide extra service by checking on all our patient's health.
3. To locate and correct any dissatisfaction in our services.
4. To generate new referrals from existing or former patients.

PROCEDURES

This program has two approaches, one by letter, and the other by phone.

A. The Patient Reactivation Letter

This is a simple notice explaining to inactive patients to come in for a spinal health care check-up. It can be sent out on a card, or in the form of a personal letter. Attached are some examples. Post cards are less expensive, and if unique enough, can be effective. Personal letters, if well written and include a photograph of the doctor, have been shown to be somewhat more effective.

- ___ 1. Mailing List. Get the patient files together for as many past years as you wish to use. On your computer, print out on labels all patients who have not been in for the last five (or so) months.
- ___ 2. Themes and Offers. Work out what theme you are going to use to send out the letter, and also what you are going to offer.

a) Sample themes:

National Correct Posture Month (May)
National Spinal Health Care Month (October)
Clinic Anniversary
Open House

b) Sample offers:

Complimentary spinal check-up (consultation and screening)
Complimentary consultation
Complimentary examination and report
Complimentary x-rays and report
Complimentary lecture
Complimentary food/refreshments
Healthcare information

- ___3. Decide the duration of your reactivation program. Two weeks to one month has worked well in the past. Make it "valid" only for a limited time period, and stick to it.
- ___4. Write a personal letter to your former patients. Make it personal. Imagine you were writing to someone in particular. You may even take a few old files out, and use them to help you write the letter. (An example of a letter and card is attached.)
- ___5. Have the letter or card edited for grammar, etc., but not in such a way as to alter your informal and personal style of communicating.
- ___6. Have the letters or cards printed so they look clean and sharp.
- ___7. Attach labels to the cards and mail so that the letter or card arrives around ten days to two weeks before the promotion. If it arrives too early, people may forget about it, or too late, they may not feel they have enough time to schedule an appointment.

B. Telephone Reactivation

The second part of the program includes making telephone calls.

When making the calls, use the script for making recalls outlined below. If a patient does not want to return to care ask them if you can "get a couple of questions answered to help us improve our service." Ask them the following questions:

- "Was there something about the office, doctor, staff, or treatment about which you were not happy?"
- "Do you have financial problems that prevented you from getting the care that you needed?"
- "Do you feel that the problem that you originally came in for was handled?"

Be understanding and empathetic with whatever the patient has to say.

If the patient is upset or feels that they were given bad service, ask them if it would be okay for the doctor to give them a call. Get a time that would be most convenient for the patient and the doctor, and route all information to the doctor, and he will personally call the patient.

DIALOGUE FOR MAKING RECALLS

A patient may end care on their own because they feel better. While it's a good sign of progress, the absence or presence of pain does not reflect complete correction. This determination is made by the doctor only. The goal of a reactivation recall is a patient in the office for a check up. From there, the doctor can determine what (if any) further treatment is needed.

When making recalls, a couple of points must be kept in mind:

- Recalls are a routine part of every practice and all types of practices (dental, etc.). We have a responsibility to the patient to make every possible effort to get them to follow through on the schedule of care originally outlined by the doctor.
- Your intention in making recalls must be to help the patient and to keep the patient well through your clinic's services. You can't make recalls a rote procedure. You have to *really* care about each patient when you call.

SAMPLE DIALOGUES

CA: "Hello, Mrs. Jones. This is Stacy from Dr. Smith's Office [clinic name]. I am calling to see if you got our recent letter. [pause] Well, May is "National Correct Posture Month" [or "We are having an open house," etc.], and we are offering check-ups and services [include services being offered] for all of our past patients.

"Dr. Smith noticed you hadn't been in since _____. He wanted me to call you to set you up for a no charge check-up to see how your treatments have been holding [schedule appointment]. "

If the patient is not sure they need to make an appointment, review their past care. Ask them questions about how their past symptoms are doing. If you have time, you can explain the purpose of preventative checkups, how pain is the last to show up, etc., and provide basic health care education.

After they are scheduled, and even if they don't schedule, you can also schedule their friends and family.

CA: "The doctor also wanted me to see if there were any other members of your family that might possibly need to get checked-up, and if so, to see if they might like to take advantage of this offer."

Possible responses:

PT: "Well, I'm feeling just wonderful, thank you. Please tell Dr. Smith that those treatments really did the trick."

CA: "That's just great, Mrs. Jones. I am happy to hear that you are feeling good and I know Dr. Smith will be pleased to hear this too. You know, his main concern was to ensure that you were maintaining the improvement that both you and the doctor worked so hard on attaining.

"He would like to have you come in for a checkup sometime soon to make sure that the structural corrections that were made are still holding. There would be no charge for this visit. If possible, He would like to see you in the next two weeks. [Be quiet, and let patient respond]

Another sample patient response:

PT: "I am not feeling very well, my back is still bothering me quite a bit."

CA: "I'm sorry to hear that, Mrs. Jones. When did the pain return? [Show interest, and get information] I know that Dr. Smith would like to see you right away. He has been concerned about you since you haven't been in for a while, and asked me to schedule you for a complimentary exam. By doing this we will be able to tell if your original problem has gotten worse, or if you have developed a new problem. He would like for you to come in this week. [pause for response] Is Tuesday or Wednesday better for you? Morning or afternoon?"

The patient will usually be very cooperative and will schedule for a free exam. If the patient is not interested, simply acknowledge this by telling them you understand and to please contact the office if they need your help. Make notes of the patient's comments.

Many assistants have misgivings about doing recalls. If you do, put yourself in the patient's place. A recall is just a courtesy extended by your office. Most patients realize this and appreciate your efforts. The fact that you care enough to call may be the only factor that brings some patients in.

According to surveys, patients actually greatly appreciate your calls, as long as the intention of the call is one of concern and care for them as individuals. If the call is just a sales call, then patients resent your intrusion into their homes.

End Results:

- A patient that comes back in and returns to their old treatment program or to a regular maintenance schedule.
- A patient that returns to care, gets a new patient exam, x-rays, and agrees to a new schedule of care (Post Report completed by assistant).
- Referrals that come in and start a treatment program.

PAPERWORK

- ___1. Obtain a computer generated list of patients that you want to mail.
- ___2. Review the list of patients and add/delete/correct names.
- ___3. Send corrected copy of list to the person using the computer to make any corrections.
- ___4. Make another copy for yourself.
- ___5. Record keeping procedure for calls:

- a) Each person should write their name on the list from which they are calling.
- b) Use the script provided, or make up one similar to it. Do Not read from it. Be natural and interested.
- c) You can use different codes to record each call. Make up your own, or you can use the codes after each call:

NC -----	Called, but No Contact
C -----	You contacted the patient
(5/25/94) -----	Date you contacted patient
AM-5/29 -----	Appointment Made for 5/29 8:30am
NAM -----	No Appointment made
NH -----	Not Happy with us.
VVH -----	Very Very Happy with us.

Examples: Joe Down----C- (5/26)-AM-6/2 11:30 VH!!
 Doris Dunn--C -- (5/26)-NAM

- ___5. Have a list of appointment times available from which to schedule your patients.
- ___6. If you run into any patients that are less than happy with us, please send a note to the doctor, and inform the person to whom you are talking that he will be contacting the patient to go over any problems, and help him/her with them.
- ___7. When you are through with the list, please file.

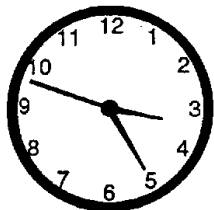
C. In the Office

- ___ 1. Prepare the staff for the inflow of new patients. Get together and set goals for the number of new patients that you want in your office.
- ___ 2. Outline and prepare for how many new patients you can see in your office in one day.
- ___ 3. Set up your appointment book for x-rays, exams, and reports.
- ___ 4. Schedule new patients for as soon as possible after they call.
- ___ 5. Even though the exam and x-rays are free, it is still important to do a thorough exam and x-ray. The patient should feel well handled and that they are getting a thorough exam and that you are concerned with their health, not just a sales pitch.
- ___ 6. Do a good report of findings and ensure that the patient attends any patient education that you have set up. So far, the patient has made no commitment - it has all been free - and they need to understand the importance of care at this point.

Remember that all promotions, to be effective, require customization to the unique situations in each office. A promotion also requires the support and enthusiasm of all members of the office.

NOTICE ★ NOTICE ★ NOTICE ★ NOTICE ★ NOTICE

IT'S SPINAL CHECK-UP TIME!



TO ALL PATIENTS WHO MAY NOT HAVE BEEN TREATED IN THIS OFFICE SINCE APRIL, 1993.

Our records show that you may not have been into our office for a chiropractic check-up recently. I sincerely hope that you are healthy and doing well. However, it has been my experience that a periodic check-up is a good health habit to you remaining healthy.

Don't wait until you have a problem. October is National Spinal Care Month. In conjunction with this and to show how strongly I feel about chiropractic check-ups, I am offering you and members of your immediate family a **COMPLIMENTARY EXAMINATION, INCLUDING X-RAYS**, if needed, at any one of our offices between October 18th and November 5th. This offer is valid during this time only and must be accompanied by this card.

CALL ONE OF OUR CONVENIENT LOCATIONS TODAY FOR YOUR APPOINTMENT.
I look forward to seeing you again.

Dr. Michael Saatkamp,
Clinic Director

HOWARDS GROVE
565-3922

SHEBOYGAN FALLS
467-8690

SHEBOYGAN-SOUTH
457-6650

SHEBOYGAN-NORTH
459-9500

PLYMOUTH
893-2345

MANITOWOC-NORTH
683-3663

MANITOWOC-SOUTH
682-3335

GREEN BAY-WEST
494-8008

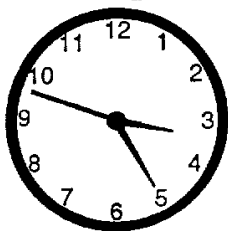
GREEN BAY-EAST
432-3311

ASHWAUBENON
496-1556

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