



Capturing Casual Conversations for Cash

By Karen Zupko, President of KarenZupko & Associates, Inc.

Potentially thousands of non-surgical revenue dollars are walking out your door every day.

Consider this: Keely Smith is in for a consultation about a blepharoplasty. At the end of the consult, she says to the surgeon, “Tell me about this CoolSculpting. I picked up the brochure when I was in the waiting room. Do you think it will help with this?” she says as she pinches the skin on her upper arms.

The surgeon, eager to stay on schedule, says, “Sure, ask Caroline at the front desk, she can tell you more.”

Keely meets with the patient care coordinator and receives a surgical quote but mentions nothing about the CoolSculpting because at this point she is focused again on her eyes. Says she must discuss scheduling dates with her mother, so someone is on “kid duty” after the procedure.

Caroline at the front desk collects Keely’s consult fee and waves good-bye. Which is what the practice might as well do to the CoolSculpting revenue, now that Keely is out the door without details or pricing. And most likely, none of the staff have scheduled a reminder to follow up with her—they didn’t know she was interested.

Here’s another common scenario: Janet Johnson is seen for a non-surgical service by the PA and during the appointment asks questions about fillers. The PA says, “that is a good option for you,” and hands the patient a sheet of paper with a face on it, sometimes even the patient’s own, with a handwritten treatment plan. The piece of paper may or may not include cost data. After Janet leaves, the PA files the sheet in a paper medical record or scans it into the EHR - both of which make follow up next to impossible because paper and PDF files are not easily searchable, nor can they be entered into a follow up queue.

The takeaway? Neither Keely nor Janet received a fee quote or information that memorialized the casual and informal conversation they had with staff about non-surgical procedures that interested them. The chats are irretrievable in both cases. And potential revenue is lost.

Why do we think this is such a mega revenue leak? With all the *sturm and drang* that goes on about Google rankings, key

words, and SEO—abstractions aimed at attracting strangers—it is almost unbelievable that a live, warm patient body in your office receives so little attention or service when they’ve expressed interest in an offering. This is a big mistake. They are already your client or patient. Patients inquiring about a treatment should receive a customized, non-surgical quote. And follow up must be organized and systematized.

Here are three ways to make this happen.

1. Create non-surgical service quotes that are distinctly non-surgical.

It is frustrating how many clients miss the nuance of creating non-surgical service fee quotes that are devoid of surgery terminology and artifacts. See the BEFORE example in

Figure 1., which displays words like ‘pre-op date’ and ‘total cost of surgery’—for a *photofacial treatment*. Such surgical terms should not be on the non-surgical services quote. Savvy patients notice, and your practice doesn’t look organized. Furthermore, it creates conversation churn for staff when confused patients call or email to ask: “Do I really need to come in prior to the treatment?”

Instead, customize the quote to be specific to spa or non-surgical services, like the AFTER example in Figure 2., which includes information about providers, scheduling, and downtime. You’ll look informed and organized, and patients will take home useful information about minimally invasive

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Figure 1. BEFORE—Poorly Created Non-Surgical Services Fee Quote

Aesthetic	Quantity	Practice Fees	Total
Procedure Fees			
Photofacial - Face, Neck Chest, Hands and Back – single		\$1,550.00	\$1,550.00
Product Fees			
Alg Juvederm Ultra for Lips and Nasal Folds	2	\$1,200.00	\$1,200.00
Alg Botox 50 units	50	\$1,000.00	\$1,000.00
Procedure Fee:		\$1,550.00	
Product Fees:		\$2,200.00	
Totals:		\$3,750.00	
Total Cost of Surgery:			\$3,750.00

Figure 2. AFTER—Well-Designed Non-Surgical Services Fee Quote

Aesthetic	Quantity	Practice Fees	Total
Procedure Fees			
Photofacial - Face, Neck Chest, Hands and Back – single		\$1,550.00	\$1,550.00
Product Fees			
Alg Juvederm Ultra for Lips and Nasal Folds	2	\$1,200.00	\$1,200.00

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treatments that reinforces what the staff explained verbally. Have these templates teed up for use for all non-surgical service types, and train front desk and clinical staff—not just the patient care coordinator—how to generate these quotes.

2. Use your system's Notes and Task Reminder features for a powerful result.

Everyone on your team is busy. It's impossible to expect them (or you) to remember every detail about every patient conversation. Technology to the rescue! Most aesthetic office software systems have two critical sales and relationship building features for capturing conversations and taking action: Patient Account Notes and Task Reminders.

Instruct your team to log details about their patient conversations in Patient Account Notes. Notes is where you can maintain the patient's ongoing story, over time. Graduations, promotions, vacations, anniversaries. The Notes field is also excellent for logging sidebar comments and additional interests patients express. For Keely—assuming the front desk staff had provided a proper quote while she was in the office—the note might have been something like: *Pt. inquired about CoolSculpting while here for bleph consult. Gave quote. Set reminder to ask patient about CoolSculpting when she schedules date of bleph. F/up set for 1 wk.*

In addition to logging the note, direct staff to set a Task Reminder to follow up, if the patient doesn't schedule. I typically suggest it be set one week or two weeks from the date the patient was in the office. Our firm trains patient care coordinators to close their fee

quote conversation by asking the patient the best timeframe and method to follow up with them. Train your front desk and spa staff to follow this best practice too. They can simply ask, “Janet, when would you prefer I follow up with you to schedule your first filler appointment?” and “What's the best number to reach you?” Enter the responses into the Task Reminder. If your system doesn't have this feature, the Outlook Calendar works well too.

3. Generate the “Unconverted Non-Surgical Fee Quotes” report. Use it to target follow up.

Generate this report to kickstart the follow up of quotes that haven't scheduled, and for which you may not yet have set Task Reminders. Use it to target certain patients with special offers and pricing instead of blasting a “15% Off Fillers!” fee reduction to everyone in the database. Why do that? First, nuanced messages are more meaningful than an email to the masses, because the copy is related to the patient's expressed needs. We all like to feel special. Second, limited time offers for only certain treatments or certain patient types is a velvet rope strategy. It conveys, “we

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aren't offering this to everyone. Because you are a valued client we are extending it to you and a friend.” Here's one option:

Dear Keely,

I know that you expressed an interest in CoolSculpting during your recent visit with Dr. Wonderful.

To help melt away some of that extra holiday weight, in the month of January we are offering a series of three, one-hour treatments at the special package price of \$1,500 (normally priced at \$2,100). This attractive price reduction, combined with Care Credit's 6 month, deferred interest offer, means you can experience CoolSculpting with a minimal financial outlay.

We are not posting this offer on Facebook or sending an email out—this is a special offer. Please call Caroline to schedule it; let her know I sent you this email. You may also share this offer with a friend.

Sincerely,

Patty Warsaw

Patient Care Coordinator

Discuss with your team the importance of capturing the casual conversations they are having with patients right now, as you read this article, and create a protocol for how best to integrate the ideas I've presented into practice workflow. Sanitize non-surgical services fee quotes of all surgery terms and information artifacts. And create special offers that are targeted to specific patient groups interested in the procedure or treatment, using targeted messages. You'll have a higher success rate.

All of these things can be accomplished with your existing staff, and technology that's already in your office. The return on revenue will delight you.

Karen Zupko is president of KarenZupko & Associates, Inc. She and her team have been advising and educating aesthetic practices on management and marketing issues from more than thirty years. Karen's next regional Patient Care Coordinator training workshop is October 19 in Atlanta. For details and additional workshop dates, go to karenzupko.com.