



Four Proven Post-Consult Follow Up Techniques

By Karen Zupko

Turning callers and prospects into scheduled consults is a subject that receives a lot of attention. However, turning consult patients who didn't book a surgery or treatment at the time of their consult into scheduled surgeries or treatments, receives very little attention at all.

Many patient care coordinators (PCCs) and medspa staff have a "call me when you are ready" closing style. They provide fees and other details, but stop there. This "wait and see" attitude does nothing to motivate patients to take any action. And if they eventually do get to the "call them" part, the conversation is banal and usually starts with, "I'm just following up to see if you want to schedule..."

There are better post-consult follow up techniques. Here are four that can yield results.

1. Schedule the follow up call as an "appointment" before the patient leaves.

No one likes to feel pushy or interruptive when they call patients to follow up. That's why I advise PCCs to proactively ask each patient for a timeframe and contact method for a follow up conversation. Like permission marketing, you are getting the patient to opt-in to your follow up effort. Here's an example of how this goes:

PCC: "I know you need to check on your mom's schedule since she'll be watching the kids during your recovery. What's a good timeframe for me to circle back with you about scheduling a surgery date?"

Patient: "I think a few weeks would be good."

PCC: "Great. [Looks at calendar.] How about June 17? Should I call or email you?"

Patient: "Actually, I'd prefer a text and June 17 would be fine."

The PCC then schedules the patient's name and contact preference as an appointment in her calendar. Getting patient agreement on a time to reconvene should happen at the end of every meeting between the patient and the PCC.

2. Contact patients listed on the Unconverted Quotes report.

This report is a treasure trove of intelligence that is often overlooked in a busy office. The



data is valuable because these patients already know you. They've been to the office and received your first class experience. They've met the surgeon. And they have a treatment plan and price in hand. Unlike the churn of new callers and email inquiries from people you have to convince about the value of your consultation fee, this group has already paid and is potentially ready to make a decision about surgery or other treatment. Don't let this group of warm leads go rogue or visit a competitor.

If you haven't printed the unconverted quote report lately, do it now. You may find that it contains patients who have already scheduled. It's likely that some of these patients got three quotes and bought one. The other two quotes appear on the report because they haven't been closed out. In addition to creating an inaccurate report, these open quotes are causing the so-called "conversion report" to be inaccurate. Ask staff to close out the extraneous quotes and report accuracy will improve.

Contact the patients who haven't scheduled, and make these conversations meaningful and nuanced. Take a look at the notes about why these patients are interested in the procedures they were seen for. Check for any special events or dates that were influencing their interest in surgery. Use this information when you contact them to pick up the relationship where you left off. This follow up can be a good time to make special

offers that can inspire people to schedule.

For example, many practice find August and September to be slow months. You might use this approach to improve fill the schedule during this doldrum period.

"Emma, I'm calling you with good news! I know you wanted to have your mommy makeover by fall. Well, Dr. Wonderful has a few surgery slots available in August and if you schedule one of them by June 15, he's offering special pricing of \$_____."

3. Review the list of Unretained Neurotoxin and Unretained Filler patients monthly.

This is the report of patients who came in for one or several treatments, but never came back. Again this is a group of people who know you, so prioritizing follow up with them will yield higher results than with people who've never been in.

I just reviewed these reports with a practice and was shocked to see just how many patients had fallen off the schedule without any notice. And, no one seemed curious about why the patient chose not to schedule follow up treatments. I advise practices to get curious about what happened to these recurring revenue patients and why. That requires a phone call.

The conversation could go like this:
"Hi Ms. Jones, this is Mackenzie calling from Dr. Wonderful's office. We haven't seen you in X months and we miss you! It looks like you're due for treatment but I don't see you on the schedule."

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Seven Benefits Your Advisor Should Bring To Your Portfolio

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focus. A cash flow analysis, personal balance sheet, income projections and goals for education and retirement are data that your advisor should gather to generate a dynamic plan that becomes your roadmap to guide the financial decisions you make for you and your family. As part of their wealth management services, your advisor should periodically review your financial plan and update it to incorporate any changes to your income, family situation, goals and time horizon.

Benefit #6: *A Clear Understanding of How You Are Doing*

If reports from your investment advisor don't paint a clear picture of your portfolio's performance, then it becomes difficult to work with your advisor to make decisions regarding your financial future. Your reports should track net contributions and withdrawals, present a customized portfolio summary, and transparently show the performance of your portfolio, net of all fees.

Benefit #7: *Total Wealth Management— Not Simply Investments*

Does your advisor's firm work only with investments, or is your advisor backed by a solid wealth management team? A multidisciplinary wealth management firm includes specialists in areas of expertise affecting your overall financial well-being. For example, attorneys can analyze each asset and make recommendations to improve protection and reduce the asset's level of exposure to lawsuits and other risks. CPAs can review tax returns and suggest ways to reduce or defer tax liability, and insurance experts can review existing policies and present options that could reduce premiums and/or improve coverage. An advisor who can offer these areas of expertise within his or her firm is well-equipped to become your financial quarterback, a resource to handle your questions concerning any financial matter.

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Follow Up Techniques

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Staff should stop there and wait for an answer. If the patient says, "Oh, I haven't had a chance to schedule another appointment" or "I've been busy and just didn't call..." these are door openers that help your team step in and offer several slots on the schedule. Never underestimate patient inertia!

If that's not the patient's response, and depending on the staff's relationship with the patient, it might be appropriate to ask why they haven't rescheduled. If the patient tells you she had to wait more than 30 minutes, perhaps you're right the wrong by inviting her to enjoy a complimentary peel so you have a second chance to dazzle her.

On the other hand, if it turns out that the patient moved to Montana, well ok, that's a good reason for not scheduling if your practice is in Ohio.

When appropriate, these follow up calls are also useful for gaining insight into the patient's experience. For instance: "Sandra if there was one thing our team could have done better for you when you were last here, what would that be?"

4. Mail a patient recall letter with a discount for scheduling in a slow month.

This is an especially good tactic to fill the schedule during slow times of the year, or if you are having trouble filling block time. The letter should go over the PCC's signature, on actual paper, with a stamp. Put it on quality stationery; don't print the letter on regular copy paper. And resist the temptation to email it. This piece should be snail mailed.

The purpose of the recall letter is to offer a limited time discount that encourages them to schedule in a defined timeframe. If the PCC has taken good notes and can identify patients who have price concerns, those patients should be high on the priority list for this letter.

The goal is to get the patient to come in and have a conversation with the PCC, address questions and concerns, and use the limited time offer to get the surgery on the books.

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