



3 times to ask for a referral

By Jay Geier, DrBicuspid.com contributing writer

November 8, 2017 -- Dentists are being inundated with claims that the better way to get new patients is through search engine optimization, pay-per-click ads, and overall internet marketing. You do have to pay attention to these things and have a plan around them, but not to the extreme that you ignore what I see as a top marketing strategy.



Referrals are the best, most cost-effective way of getting new patients in your office. In fact, referrals should make up 40% to 60% of your new patients each year.

Getting referrals should be easy, right? You provide excellent value to your patients, and they, in turn, will tell all their family and friends about you. But time and time again, we see dental offices missing the mark on this opportunity.

Asking for referrals

Why? People get hung up on the simple act of asking for referrals. Will it offend them? Am I overstepping my boundaries by asking for a referral? Is it too pushy? When is the right time?

You will not offend someone by asking for a referral. Also, if you're not intentional about asking, you will miss some pretty obvious opportunities -- and lots of new patients. Good patients want to refer to you as a way of saying "thank you."

Here are three examples of how and when to ask for a referral by leveraging a patient appreciation or a referral contest.

1. On arrival

Depending on the state you live in, a contest is a great way to get your team and your existing patients engaged in meeting your new patient goal. Patients can be entered into the contest through referrals or even through social media. For example, a Facebook "like" or "check in" would get an entry into the contest.

Again, know your local laws, but if this concept works, you should make sure your prize is exciting and worth talking about. It can be tied in to a season or local event, or it can be an "evergreen" option.

Whatever it is you choose as the prize, be sure to have it prominently displayed in the office reception area. I had one client who gave tickets and limo service to a Ricky Martin concert, so he ordered a cardboard cutout of Martin and stood it next to a poster with all the contest details in the waiting room. There was no way someone would miss that.

When you have your prize on display, it will prompt patients to ask, "What is [the prize] doing in the middle of your waiting room?" This creates the perfect opportunity for you to say, "Oh, that's the prize for our patient appreciation contest. All you have to do is refer your friends and family, and you will be entered in the drawing."

And if they don't ask what's going on in the middle of your reception area, you still have an opportunity to tell them about it. Just ask how they heard about your office.

2. In the chair

Another opportunity to leverage a contest is when your patients are in the chair. Let's say you've set up your contest to include people who like or check into your office using Facebook. You can say, "I see you have your phone out. Did you like us or check in on Facebook? When you do, your name goes into a drawing this month. Did you see the [insert prize here] that we're giving away?"

Before you finish the appointment, you can offer them a brochure complete with contest details and tear off cards to give to their friends.

3. At checkout

You can also ask for referrals when patients check out. So the front desk team member should say, "Mrs. Jones, how was your visit today?" After the answer, reply, "Is there anything we could've done to make your visit more comfortable today?"

This is when you will expect to hear a compliment, which is the best time to ask for a referral.

"I'm so glad you had a good experience. Won't you please tell your friends and family to come see us? I'd love for you to have a chance to win [the prize] we're giving away."

But these conversations will not come naturally if you and your team aren't focused on getting new patients in your office. You should not be the only one in charge of getting referrals; your staff should own this responsibility as well. Also, have one team member own this statistic. That person should be role-playing different scenarios, updating the team on your progress, and championing the program.

Referrals come to you already trusting you, and they are more likely to accept treatment. Their acquisition cost is much lower than a new patient who came to you through traditional marketing, so it's worth the effort to invest in this special category of new patients. Start practicing the dialogue above, and you should start seeing a rise in your referrals in no time.

Jay Geier is the founder and owner of the [Scheduling Institute](#), a dental training and practice consulting company. Take the 5 Star Challenge [here](#).

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Rod W

Not only are state laws an issue but one needs to be aware of ethical concerns in any promotion that looks to reward patients. The ADA Principles of Ethics and Code of Professional Conduct addresses this under referral services Section 5F4:

"A dentist is allowed to pay for any advertising permitted by the Code, but is generally not permitted to make payments to another person or entity for the referral of a patient for professional services."

Although this is under referral services it would apply to paying a patient to refer another and would include gifts to patients referring others. A nominal gift as a thank you for a referral is acceptable but offering a reward for each new patient referred is unethical and, as the author mentioned, illegal in many states.



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