Vein Specialists of America
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TURNING INQUIRIES INTO CONSULTATIONS

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The #1 reason customers stop doing business with a particular company is because of an attitude of indifference by employees. Imagine, then, how influential that first contact with a potential patient can be. A less than positive first impression might cause a patient not to schedule an initial consultation with your practice and instead call your competitor.

Do the personnel who answer your phones exude a positive attitude? If they don't, service-oriented patients may choose to have their vein treatments elsewhere. That would be a problem, so make sure the staff who answer phones in your office:

- **Put a smile in their voices.** Research has shown that smiling projects a more positive and enthusiastic tone into the speaking voice. The caller will have a much more pleasant experience if your staff seems upbeat and helpful on the phone or in person.
- **Introduce themselves and call the patient by name.** Names go a long way in personalizing the conversation. An old adage states, "There is no music sweeter to our ears than the sound of our own name."
- **Provide callers with a choice of consultation times.** Experienced schedulers offer prospective patients a choice when arranging a consultation. For example, "You could come in at 10:30 a.m. or 2:30 p.m.; which is best for you?" This demonstrates your practice's customer service orientation.
- **Explain the purpose of the consultation.** Assure the caller that the consultation does not obligate the patient to schedule a procedure. Explain that the consultation is an opportunity for the patient to determine if he or she feels comfortable with the physician and the recommended treatment of their vein disease.
- **Be prepared to discuss fees.** The receptionist or patient relations coordinator can rehearse appropriate responses to fee inquiries so that insurance plans you accept, and your financial policies are explained in an understandable way. If your policy is to provide callers with a range of fees, make sure the receptionist has the list. If your policy precludes quoting fees, provide staff with a standard response to fee questions.
- **Gather key data from each caller.** Every caller should be asked for his/her demographic information and about how he/she was referred to the practice. Regardless of whether or not the caller decides to schedule the appointment, the information can be entered into your practice database for future mailings, and to track how many callers turn into patients, and/or schedule procedures.

As the healthcare experience becomes increasingly digitized, many practices are operating under the assumption that the phone will soon be obsolete, this simply is not the case. While online appointment scheduling is certainly on the rise (and a vital component of any conversion- optimized website), recent surveys suggest that patients still prefer booking appointments via phone. Interestingly, practices may actually see an increase in call volume as mobile-optimized ads, websites, social media, and click-to-call functionality become baseline medical marketing best practices.

The key takeaway here is that improving your marketing outcomes involves optimizing a wide variety of areas to ensure a seamless, positive experience, and brand association throughout the path to treatment. And while this does require some time, energy, and expertise to do correctly, the potential returns on that investment make it well worth the effort.

Your ability to positively impact the lives of your patients has never been greater. Advances in vein care means that consumers are now able to achieve favorable results with less downtime, discomfort, cost, or inconvenience than ever before. But the reality is, patients cannot experience your expertise if you are unable to obtain their trust and interest. Once a potential patient is in your office, you must convince them that you are the perfect provider to treat their symptoms. Getting a "yes" from a prospective patient to move forward from consultation to treatment requires everyone at your practice to be on the same page, with the same message.

The success of a consultation may be decided long before a prospective patient calls for an appointment or arrives for their appointment. Consumers begin forming impressions of your abilities, integrity, and trustworthiness from the moment they hear or see your name. It's important to understand the mindset of your patient. Patient fear and uncertainly are perhaps your biggest challenges. Many people have heard horror stories from friends or colleagues. They worry that a suboptimal result is not only possible, but probable. Your ability to establish trust through your expertise, manner, office environment, and documented positive outcomes, are paramount.

Practice Image:

How you position your practice through marketing contributes to shaping your patient's office consultation. This positioning, often called branding, establishes patient expectations and creates an image for your office. When done well, branding can be a great service for consumers because it enables you to communicate key information, including:

- **An accurate idea of the medical treatments you provide**
- **The ideal consumer for your services**
- **How your practice stands out from other providers**
- **Your areas of training and expertise**
- **How patients can expect to be treated in your office**

In this way, strong branding strategies help consumers make informed choices that they can feel confident about. Good branding helps to ease patient anxiety about what they might experience when they visit your vein practice.

Branding is an ongoing process. This crucial step covers the way you represent your practice through such attributes as the office location, décor, name, tag line, logo, and with design elements like color, typeface, and more. Branding choices affect how you come across to potential patients. Consistency in this presentation is key.

Patients will get confused if you promote yourself based on price one week and based on your spa-like experience the next. From office décor and patient interactions, to your website, social media, and other marketing initiatives, your branding should be consistent. Often, your first impression to patients will be through your website. It's important that your website does a good job of representing your practice to potential patients and providing information about treatments and experience. If you have any doubt about whether your website will leave a positive impression, have it evaluated by a third-party. Another way that patients form impressions of your practice is through review sites. These sites are widely read and multiple negative reviews can be a kiss of death for your practice. Your marketing team should monitor these sites regularly, respond constructively to comments, and establish a campaign to generate good reviews.

From First Contact to Consultation

Once a patient has decided to contact your office, every interaction must facilitate the journey to a "yes." This usually begins with the prospective patient's first phone call to your office. Of course, every call must be answered promptly by a friendly voice. Scheduling should be straightforward; most patients may be ready to set up an appointment right away. Patients may also have questions about your procedures and fees. Always handle this step with great care; your first communication will go a long way to solidifying their expectations in terms of trustworthiness, outcome, and cost.

Staff members are ambassadors for your practice, so staff training is crucial. You may even find that anything beyond the most routine questions should be handled by a specially trained staff member or patient care coordinator. A care coordinator is, to a large extent, a salesperson. They must not only offer a deep understanding of the vein treatments available, but also represent your practice's patient care philosophy.

Once a patient decides to give your practice a chance, it's time to focus on making a stellar first impression. While critical interactions take place before your prospective patient ever reaches your office, it is equally important to make an impact on the patient from the moment they walk through the door. Your goal is to establish your expertise and trustworthiness, using every avenue available to you. Between the prospective patient's arrival and their initial interaction with the treatment provider, small details can make a big difference in the patient's decision.

Patients Form Impressions From Subtle Clues

Maximize the first impression of your office. Most patients do not have the expertise to evaluate your clinical skills, so they put heavy weight on subtle cues that speak to your abilities and value proposition. Cast a fresh eye on your office's curb appeal. Your signage, exterior, and entry should be inviting. It should communicate what you do and what your brand stands for. If anything seems dated, cheap, or dingy, that will negatively affect the new patient's assessment, even if they aren't consciously aware of it. Ensure the overall look of your office is reassuring, memorable, and pleasant. Professional design can be a worthwhile investment. A designer will make sure your signage, colors, finishes, lighting, and furnishings coherently convey a message that aligns with your office objectives.

Appointment Scheduling

In an increasingly competitive healthcare environment, patients have no shortage of options when choosing a provider. An ever-increasing number of prospective patients use the internet to read about your practice and the services provided, before booking an appointment. In other words, most patients are aware of multiple practices providing similar services and are likely contacting more than one before making a final decision. As such, patients who experience undue friction during the evaluation stage of their path to treatment, typically don't stick around for long.

For medical practices looking to "win" in this competitive environment, phone optimization is becoming an increasingly critical factor. As the first live interaction with your brand, a patient's experience when they call can often make or break their decision to go with you over a competitor.

VSA has audited thousands of phone calls for medical practices over the years, which has helped us gain a unique perspective on phone reception best practices. We've seen conversions on phone "inquiries" ranging anywhere between 10% to 80%. This metric is more in your control than you may realize. Prioritize New Patients. The people calling your medical practice will generally fall into three categories: new patients, existing patients, and miscellaneous salespeople. Among these groups, it's essential that you prioritize new patients. It's crucial to make sure your appointment scheduler is adequately prepared to treat incoming phone calls as sales opportunities.

According to recent research, patients remain frustrated with the difficulty of scheduling appointments, unhelpful telephone staff, and slow response time. Even if you're investing heavily in digital marketing and driving heaps of traffic to your practice's website, if your staff doesn't know how to properly answer their phone calls when it comes time to book an appointment, you're probably not going to see a very high rate of conversion.

1. Basic Principles to Keep Patients (On the telephone). First and foremost, one of the best ways to improve the prospective patient experience is allowing them to avoid the phone call altogether. Make sure your website is optimized and up-to-date, with as much information as possible. That means your clinic hours, directions, telephone number(s), and basic information about vein disease and treatment options. That said, even the most digitally advanced practices will still receive plenty of callers, and your staff will need to be ready to welcome their questions with a friendly attitude, and a solid knowledge of your practice.

Most practices tend to receive a similar set of questions from first-time callers: "Do you accept my insurance? Do you offer spider vein or varicose vein treatments? What are your office hours?" You can make your receptionist's job easier (and improve the experience of first-time callers) by furnishing them with a list of ideal answers to frequently asked questions. Your reception script might also include some branding information, i.e. a few brief points which differentiate your practice from your competitors. You should address accepted insurance plans as quickly as possible, as neither the caller, nor your staff, benefits from a lengthy conversation that ends with "Sorry, we don't accept your insurance plan."

2. Staffing Levels. Make sure that you have an adequate number of staff cross-trained to answer phones so that no caller is forced to wait too long on hold. Most important of all is the need for receptionists to remain friendly and confident throughout the day, since any first-time caller will likely be judging your practice based on their interaction with the person who picks up the phone. If there's any sense of indifference, frustration, or rudeness on the other line, that potential patient will likely be taking their business elsewhere.

3. Don't Let Potential New Business Hang Up the Phone. Many receptionists tell patients they will call back when they need to get an answer to a patient's question, prior to scheduling an appointment. Letting the patient get off the line dramatically reduces the overall chance of conversion. Whenever possible, receptionists should consult a physician to gather information before hanging up on a potential patient. If a patient pushes for an extensive dialogue regarding treatment options, it's best to schedule an in-person consultation rather than leaving them in the dark or telling them to call back another time.

Remember that reception is an integral part of a practice's ability to be successful and should be approached with the same consideration and effort as any other component of your patient acquisition and retention strategy.

It's always a good idea to set concrete goals and measures of success: how long are your calls on average? What's the average hold time for your practice? How many calls turn into new appointments? Try to collect feedback and data whenever possible in order to improve outcomes — for example, try recording calls in order to assess the patient experience and see what can be improved, or periodically reach out to new and existing patients with short surveys in order to gauge the level of satisfaction.

The Reception Desk

The patient's next stop on their journey is check-in. This will most likely be their first in-person encounter with a member of your staff, so it is a critical interaction. It is imperative that the receptionist is friendly, greets each person as they arrive, and makes eye contact. This seems obvious, but it is often not the case. Each person should be acknowledged within a few seconds of walking in the door. Even if front desk staff members are otherwise occupied, this can be as easy as simply looking up, making eye contact, and saying, "I'll be right with you," when a new patient enters. The sooner you can connect with them and get them settled in, the less nervous they will be.

You don't want new patients to wait more than a minute or two at check-in, and gatherings around the reception desk should especially be avoided. If a short delay is unavoidable for some reason, the receptionist should ensure that seating is available, and help patients get comfortable while they wait. As soon as possible, the receptionist should come out from behind the desk, find the patient, and invite them to come check in. Each of these actions speaks to how much your practice values each individual it serves. It makes a powerful impression on the prospective patient.

Some offices have even gone so far as to eliminate reception and waiting rooms entirely. Instead, they have an assistant who greets patients at the door and escorts them immediately to an exam or treatment room. This frees up space for additional service areas, enhances patient privacy, and promotes a sense of individual attention.

Either way, consider it from the perspective of the patient: Would you feel more cared for if you experienced an impersonal process designed for the convenience of the staff, or if you were treated as an individual whose time and feelings mattered? Greeting new customers should always be included in staff training (and retraining). As busy as staff may be, it only takes a few moments to give patients a warm welcome, and it makes a world of difference.

Once the patient has checked in, they may have a few minutes to wait. Waiting should always be kept to a minimum. Numerous national patient satisfaction reports find that patient confidence in the provider and perceived quality were negatively correlated with wait time. If waiting is inevitable, ensure that your waiting room offers a pleasant experience. Comfortable and attractive seating is a must. Varied seating types beyond the same stiff set of chairs found in primary care practices offer options for people of different ages and body types, and it makes everyone feel more welcome and comfortable. Helping patients to relax while they wait will go a long way in reassuring them before a consultation.

Other essentials include a variety of recent reading material, such as magazines, and reliable free Wi-Fi. Amenities, such as coffee, tea, bottled drinks, or spa water (water beautifully enhanced with slices of fresh lemon, cucumber, or berries) are a nice touch. The waiting area also offers an opportunity to communicate your expertise and trustworthiness. Without looking too cluttered, consider displaying any degrees, awards, recognitions, and photos of patient success stories.

Display information on your treatments, including videos that orient the patient to office procedures, what to expect, positive patient testimonials, and details on additional services. By setting the groundwork for a positive patient experience from the moment that a patient arrives in your office, you pave the way for a successful consult. The process of building trust with a patient during the consult is both delicate and critical. It is important to ensure that you and your patient are in alignment on needs and goals.

The Consultation

Since everything you do and say in this meeting is significant, it's not the time to improvise. Develop a clearly defined procedure for venous consultations, shaped by your office philosophy and mode of operation — there is no one “right” way to structure a consultation. What's important is that you approach the consultation in a highly intentional way. Define how you want this interaction to flow, then follow the process consistently for each consultation.

Physician Introduction

Generally, the best way to start is to shake hands, introduce yourself, highlight your experience and qualifications (or those of the clinic), and explain the order of events in the consultation. Let the patient know what will happen during their time with you, the kind of information they can anticipate receiving from you, and how it will conclude.

Review

Next, review the patient's intake form with them, getting more detail and elaboration on anything that is unclear. This can be a review both of medical history and of any previous procedures.

Assess Concerns

Now, it's time to listen. The best way to transition to this part of the consult is to ask an open-ended question such as, "What brings you here today?" This part of the consultation should account for more than half of your time together to ensure you understand and are on the same page as the patient. While it may seem self-evident, do not assume you know where the patient's narrative is going or how they feel.

The patient should be doing most of the talking in this part of the consultation. Patient satisfaction is the primary goal of a vein treatment and listening enables you to understand what will best satisfy the patient. To do this, you will need to explore the patient's goals, motivations, and expectations, within a relationship of trust. Communication breakdown is common. This can occur when the physician's focus is on delivering treatments rather than on the patient's concerns, preferences, desires, and values. Remember: It's not about you!

Developing and Discussing A Treatment Plan

At this point in the consult, you and the patient are ready to begin discussing a treatment plan that will address the problems identified and the underlying causes. Consumers today are well-informed about vein procedures and may come seeking a specific procedure or therapy. Diagrams, drawings, and photos can help you explain vein disease and available treatment options. You may want to provide a written treatment plan for the patient to take home, summarizing your clinical recommendations, treatment timeline, and expected patient cost after insurance.

As you discuss treatment options, be honest and forthcoming, including any pain and recovery time. Inform the patient on a range of potential outcomes. Make sure the patient understands their options and risks. Not only is this ethical and necessary for informed consent, but it also reinforces your trustworthiness. Undersell and over-deliver is a wise policy.

Depending on the expense and complexity involved, this point in the consultation may also be an appropriate moment to discuss financing options, or at least to mention that they exist. Once you have covered the treatment plan, give the patient an opportunity to agree to the plan and commit to a treatment appointment. You do not want to apply undue pressure, but it is appropriate to try to schedule the procedure(s).

Acceptance of Treatment Plan

At this point, you are nearing the end of the consultation appointment. If you have laid the groundwork well, the patient is enthusiastic about committing to the next step. Before leaving your office, they will book an appointment for their procedure. However, some people might still be hesitant. Do your best to understand their reservations and address them. Some physicians feel awkward about this, fearing it veers toward the hard sell.

While some unscrupulous clinics may focus on revenue alone, most practices view this part of the consultation as an essential step to providing personalized care, by making sure that patients are offered the right services for their individual needs. Patients generally appreciate this approach. As a patient-centered practice, you owe it to them to understand why they may be hesitant. If this hesitation stems from a misunderstanding or inadequate information, you can address it and allay their concerns.

Addressing Patient Reluctance

Earlier in the consultation, you listened to the prospective patient's concerns and desired outcomes. You ascertained that the treatment plan is appropriate for the patient, and you sought to ensure they understood the procedure, results, risks, and benefits.

Through your efforts to connect and build rapport with the prospective patient as a person, you should have a good idea at this stage about why they are considering treatment. Using this insight, explore their concerns and help them work through them. Use reflective listening and careful questions to get them to discuss their reservations more fully.

ABOUT VSA

176	582	$15	98%
Practice Start Ups Since 2002	Client Engagements Since 2002	Avg. Client ROI Per $1 Since 2002	Client Satisfaction Since 2002

Vein Specialists of America is a phlebology-specific practice management, marketing & revenue cycle management advisory & consulting firm. We focus on implementation management & results-oriented consulting, which enables us to help our clients realize the true strategic & operational potential of the medical practices they own and operate.

With a team effort offering business intelligence and 100s of years of experience, our clients have experienced increased revenues, decreased expenses, & greater profitability without the daily concerns of office operations management. We look forward to doing the same for you!

> **"In any successful consulting relationship, there are three synchronous elements that must be delivered: experience, integrity and a commitment to achieving measurable results. A noticeable deficit in any one of these elements will compromise the overall outcome of an engagement and the prospects for a long – term business relationship."**
>
> **-David P. Schmiege, President & CEO**

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