Can talking, texting, and emailing really boost your bottom line?

by William Rabourn Jr.

About the author

William Rabourn Jr.
Managing Principal
Medical Consulting Group
Springfield, Missouri

Owning and operating a medical practice is challenging. In addition to patient care, physician owners must wear many hats for their business to operate effectively. The daily routine of juggling priorities can sometimes be all-consuming, and as a result, opportunities to grow your business may get overlooked.

One of the most frequently missed opportunities for growth lies with patient and employee engagement. This is more than a nice sentiment or trendy catch phrase. Effective communication with employees can help maximize operational efficiencies and save the practice money. Likewise, effective engagement before, during, and after visits can positively affect the overall patient experience and perception of your practice, leading to more referrals and an increase in business. In short, positive engagement results in a boost to your bottom line.

So, how can practices take advantage of this often-missed opportunity?

One way to improve engagement is to invest in customer relationship management (CRM) software. This is not a replacement for face-to-face interaction, but rather a tool to supplement and manage it better. CRMs centralize patient data and can carry out automated tasks that can free up staff time to be allocated to more important activities. For example, CRMs can send automatic appointment reminders to patients via phone, email, or text so that staff doesn't have to manually call each patient. It can also streamline the check-in process, especially for new patients, by sending links to fillable online forms that are identical to the hard copy ones used in your office. This will allow you to gather the necessary medical history and insurance information before they arrive for their appointment or to collect any other necessary information.

Another advantage of using CRM software is that it can electronically send past and present patients marketing and educational materials. For current patients this may mean sending out an information sheet or link to an online video explaining a procedure they are about to receive. This is helpful because it means patients will be more relaxed before arriving at the clinic and will have fewer questions. Because

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they have a better understanding of what's happening, they will be more likely to comply with after-care instructions.

For past patients or those that need a checkup, CRMs can send automated messages encouraging them to schedule an appointment or advertise services such as LASIK, refractive lens replacement, or cataract surgery. CRMs can also help manage and track referrals, which means it can help acquire and market to potential new patients using the same outreach tools.

Because CRMs centralize patient data, physician owners can also take advantage of another powerful tool—custom reporting. Reporting can provide a detailed view of every operational aspect of the practice as well as key performance indicators, so management knows where to adjust and take advantage of opportunities.

There are many different CRM options to choose from. Be sure to pick the one that best meets your needs. Also, be sure the CRM chosen is HIPAA compliant and can effectively transfer data from any system that may be currently in use. CRMs are a tool meant to increase efficiency, save time, and better communicate with patients so that you and your staff can be more focused on addressing their needs in person when they visit.

Don't forget the staff

Just as important as external and patient communication, staff engagement plays a key role in the success of any practice. It's easy for staff to become disconnected if there is little two-way

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communication or feedback with management. This is especially true in bigger practices where there are many employees and departments. The result is that inefficiencies develop that can affect the patient experience and overall operations.

However, there are some things practices can do to ensure staff remains focused, informed, and connected. One of the best ways to accomplish this is to hold regular, all-hands employee meetings. These inform and educate staff on current issues and goals so that everyone is on the same page and help staff interact with each other.

For example, it's easy for departments to get "siloed" so that no one in the organization has a clear idea of what the role or functions of other departments may be. Perhaps during a meeting, department managers can give a brief presentation explaining specifically what their department does and how their role fits into the overall organization. This can significantly affect operational efficiency. Instead of hunting for answers or help with problems, staff will have a clear understanding of how the whole organization works and where to go to get information or assistance when needed. It also encourages teamwork while helping everyone get better acquainted with colleagues they may not see or interact with very often.

Another way to keep staff engaged and working efficiently is to provide continuing education or training in their specific areas of expertise. Providing continuing education keeps everyone's skills up to date and helps maximize efficiency while providing the best patient experience possible.

Something else to consider is using online or app-based software to streamline HR management. This will save time that can then be channeled into more important tasks while giving staff more control over their interaction with the practice. There are many great resources to choose from that provide a host of tools employees can use to do things such as view payroll stubs, request time off, sign up for direct deposit, complete onboarding paperwork, and view their benefits.

Finally, if you use a CRM, use it to identify areas of improvement and make decisions on how best to allocate staff resources. This will further increase operational efficiency and save money.

Getting help

You may be thinking that all of this sounds great, but there isn't enough time to do it. That's when to consider seeking outside help. There are many organizations that can help implement and manage these recommendations, especially when it comes to marketing. Shop around to find the best fit for your needs. When doing so, here are some things to consider.

Set goals first. Be clear on exactly what you want to do and what your goals are. This will guide you in picking a vendor to fit your needs.

Choose a company or marketing agency that specializes in healthcare, specifically ophthalmology if possible. This is especially true if you're looking for marketing assistance. If you hire an agency that has no experience in healthcare or ophthalmology, you'll be paying for their learning curve, and it could take a while to get them up to speed. The key to choosing the right agency is finding one that can provide the full spectrum of services that fits your practice culture, style, and needs. Boutique firms that specialize in ophthalmology or healthcare are often the best choice and will be able to hit the ground running from day one.

Don't limit the options. The agency you choose doesn't have to be local. Look outside your area for help. With today's communication technology, most marketing and consulting can be done remotely. Do an online search and see what results turn up. This will provide more options to choose from without sacrificing the quality of service.

Look at their portfolio and talk to current clients. This is a good way to evaluate the type of company they are, how they do business, their track record, and what to expect when working with them.

At the end of the day, everything we do comes down to building strong relationships. To be successful, you must earn the trust and respect of your employees and patients. This means taking the time and investing the resources into effective engagement both internally and externally. Doing so will improve your patients' experience, make your practice more efficient, and increase your bottom line.

Contact
Rabourn:
brabourn@medcgroup.com