



Accelerating Practices, One Patient at a Time
Lead Conversion Management

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Background:

To have a successful practice it is no longer an option to simply opening a practice and expect patients will come. Medicine has become a competitive marketplace in which patient motivations for care and expectations from a practice have evolved. In order to successfully transition prospective patients into satisfied patients the approach to care of must be tailored to support the unique needs of those individuals. The experience delivered must be customer centric and focused on the perspective of the patient not just on the care provided.

In addition, practices now require a more comprehensive approach to business, incorporating sales and marketing strategies generally not used in most medical practices. For practices not experienced in catering to this type of patient expectation, the challenges of identifying necessary adjustments to operations and the adoption of necessary marketing efforts can be significant impediments to success.

Many practices are focused on **patient acquisition and marketing**. Most marketing companies have you focused on how many views, clicks or calls they drive to your practice. What you need in your practice is patient appointments. Most practices **lose 36%** of prospective patient **opportunities** resulting in an average of more than **\$1,300,000 LOST EACH YEAR**. My Patient Experience is your tool to **convert more leads** and **create more loyal patients**.

Service Description:

My Patient Experience provides **lead conversion management** tools, training, and guidance to help build a team that will fully understand the importance of their role and be able to convert **phone calls into consultations** and ensure an **outstanding experience** from phone call to follow up.

Through training, tracking, and marketing practices are able to:

- Increase Call to Appointment Ratio by up to 33%
- Automate Marketing and Communication to Patients
- Know Exactly What Marketing is Generating Consultations
- Recapture Missed Opportunities
- Discover and Fill the “Gap” in Your Practice

The goal of My Patient Experience is to provide a solution for practices to **create more opportunities** to **generate new patients**, ensure the highest level of **patient satisfaction**, and generate patient **referrals**. My Patient Experience provides a comprehensive solution that results in more patients, better data, with no additional effort.



What You Get:

Our members are provided:

- Patient intake analysis
- Customized phone script
- Live virtual staff training
- Performance management call tracking solution
- Staff e-learning system
- Automated Patient Communication Solution
- Comprehensive Marketing Resource

Patient Intake Analysis

As a starting point our team will assess your patient intake process to **identify areas of opportunity** and ensure you are **maximizing your opportunity** to capture interest. Many practices have great systems in place but often times those **systems breakdown**. Our analysis will not only review the systems in place but test those systems to **ensure your team is effectively managing incoming leads**.

During this process we will review your front end to ensure your practice is capturing every possible opportunity and responding quickly to prospective patient interest:

- Website conversion performance
- Electronic inquiry effectiveness
- Phone system call handling
- Identify barriers to patient scheduling

Customized Phone Script

What is said and how it is said is one of the biggest factors to ensure **“shoppers”** and prospects become **patients**.

We work with practices to develop a customized phone script that will help your **staff say what you want them to say** to your prospective patients. The script is designed using input from you and our **simple call conversion** strategy to help conversations flow naturally.

Your custom phone script will include:

- How to **discuss your top procedures**
- How to **tell patients you are great** and **differentiate your practice**
- What to say to give patients **a reason to schedule**
- How to **communicate** the **value** of the consult to improve conversions
- What to say that will **decrease** your **no show rate**



Live Virtual Training

Our training process uses live training and coaching to teach effective strategies and reinforce implementation. Training is never a one time event. It is a process that requires reinforcement to create consistent behaviors.

We start by teaching basic skills and strategies to convert leads and continue with sessions that focus on adoption and utilization employing role playing, recorded call analysis, performance evaluation, and self assessment.

Our live virtual training sessions provide your team with:

- Phone conversion skills
- Role Playing with customized practice script
- Communicating value to eliminate price objections
- How to differentiate your practice

Performance Management Call Tracking Solution

The primary goal of accepting calls in your office is to schedule appointments. Our call tracking solution goes beyond any available to **track EVERY inbound call** to the point of conversion, **scheduling an appointment**.

With our call tracking solution you will:

- Know the source of every inbound call
- Know how many calls are **ACTUAL PROSPECTS** not sales calls
- Know how many calls **SCHEDULE APPOINTMENTS**
- Know the **CONVERSION RATE** of every staff member
- Be able to **RECAPTURE MISSED OPPORTUNITIES**

Without any additional effort practices receive detailed information about:

Source of every inbound call:

15 unique call tracking numbers provided to track calls by each ad source and gain visibility into the success of each individual marketing effort. All calls are recorded and are available through the recording system with just a couple clicks.



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Marketing Breakdown (Con.) Nov 2015

Ad Source Breakdown										
Ad Sources	Current Month						6 Month Avg			
	Total Calls	Qualified Calls	Prospects	Prospect % ¹	Appts	Appt % ¹	Prospects	Prospect %	Appts	Appt %
All Ad Sources	607	538	252	90%	190	75%	214	90%	162	76%
Google RSM	90	83	38	97%	28	74%	33	93%	27	80%
Website Toll Free	59	55	30	94%	21	70%	26	91%	18	69%
Google SC	68	58	27	90%	20	74%	11	89%	8	78%
Google AV	79	65	27	82%	20	74%	15	82%	11	78%
Email	37	32	24	96%	22	92%	20	97%	15	75%
Yelp RSM	57	51	24	89%	17	71%	20	90%	15	74%
Website SC	56	50	18	86%	15	83%	18	87%	15	82%
888-596-FACE	36	35	15	79%	11	73%	16	90%	12	75%
Yelp AV	30	24	13	93%	6	46%	14	90%	9	69%
Yelp SC	36	33	13	93%	12	92%	13	90%	10	78%
Website AV	34	29	10	91%	8	80%	18	93%	14	75%
Website RSM	16	15	8	100%	6	75%	8	89%	6	77%
Facebook	2	2	2	100%	2	100%	1	80%	1	100%
Spring into Smooth	3	3	2	67%	1	50%	0	67%	0	50%
Spring Newsletter '14 (Pts '05-'11)	1	1	1	100%	1	100%	0	100%	0	100%
Newsletter Spring 2013_pts. 2011+	2	1	0	0%	0	0%	0	100%	0	100%
Plaza Antonio Directory	1	1	0	0%	0	0%	1	75%	0	33%

Tracking of actual prospect phone calls:

Calls are reviewed to filter out non-prospect calls from performance measures. This ensures the highest quality data relating to marketing performance and staff performance tracking.

Employee Performance Report

Employee	Prospect Call Review %	Appt %
Laura Smith	24%	76%
Matthew Johnson	25%	75%
Jeff Bryant	29%	71%
Caitlyn Roberts	30%	70%
Stephen Marcus	40%	60%

Show number of Employees: 10

Total number of prospect calls reviewed: 129

Employee	Total Calls	Alerts Sent	% Alerts	Same Day Appts	Future Appts	Total Appts	% Appts
Jason Stewart	19	1	5%	3	15	18	95%
Ron Stevens	14	1	7%	1	12	13	93%
Sharon Yates	10	1	10%	0	9	9	90%
Terry Michaels	6	1	17%	0	5	5	83%
James Turner	17	4	23%	4	9	13	77%
Laura Smith	16	4	24%	6	6	12	76%
Matthew Johnson	8	2	25%	1	5	6	75%
Jeff Bryant	14	4	29%	2	8	10	71%
Caitlyn Roberts	10	3	30%	3	4	7	70%
Stephen Marcus	15	6	40%	2	7	9	60%
Totals	129	41	30%	9	79	88	70%

Call conversion details:

Each call is reviewed to determine if the caller achieves the one goal of fielding the phone call, scheduling an appointment. The ad source is recorded through the system and the staff member handling the



call is identified in order to know which marketing efforts are producing results and the conversion rate of staff members.

Staff E-learning System:

Practices commonly **train staff members on the tasks** required to perform their job. What is **often lacking** is training on the skills and understanding of **how to take care of patients** and **provide an outstanding experience**. The e-learning module provides each staff member their own login information and assigned courses. Course progress is tracked and quiz grading reinforces key concepts. The primary user can see the course progress and scores for each user assigned to them.

The E- learning module will help your staff:

- **Understand** your **patients** and what is important to them
- Identify their **role** in providing an **outstanding experience**
- Learn the **keys** to **delivering an outstanding experience**
- Know how to leave a **lasting impression** on your patients

Comprehensive Automated Patient Communications Solution:

We take the industries best practices to build comprehensive campaigns focused on conversion. We build a multi stage sales funnel to generate the best possible conversion rate for prospective patients.

Our External Strategy:

- Custom videos with logo and call to action
- Landing page optimized for conversion
- Autoresponder email sequence to enhance engagement and increase lead contact rate

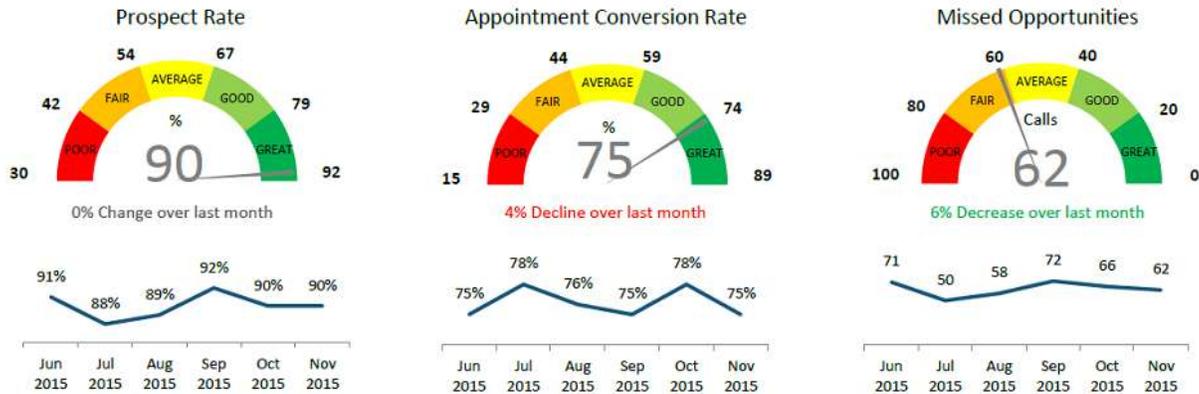
Our Internal Strategy:

- Monthly newsletters with one to two educational articles focused on conversion
- Email blast using conditional resends to enhance open rates
- Landing page focused on a call to action
- Social posts to enhance visibility and drive more leads to conversion



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Reporting:



Value of Missed Opportunities: \$27,900*

Performance measurement is one of the keys to being successful in business. Our reporting platform allows for practices to access data at any time and customize the information presented. We set up an automated reporting system in which reports are sent daily, weekly and monthly. The monthly Owner Summary report provides a snapshot of activity to provide practices insight into marketing performance, staff performance, and practice performance.

Summary:

Your Team Results Membership includes the following:

\$649 month

- Comprehensive call tracking and assessment solution
 - Up to 15 call tracking numbers
- Call scripting for up to five procedures
- Live virtual training of your staff on call conversion strategy
- Automated Patient Communication Solution access
 - Automate marketing and patient communications
 - Autoresponder email sequence for all website leads
 - Form integration for seamless lead interface

Internal Marketing Plan:

\$599 month

- One targeted article per month
- Email blast to all existing patients
 - 3 conditional resends to enhance exposure
- One landing page supporting the article and a call to action
- 4-8 social posts driving traffic to your landing page

\$299 with Team Results

Setup Fees:

Team Results \$299 with first 30 days free. Includes all tracking number setup, intake analysis, scripting, and training.



Internal Marketing \$499. Includes social integration, website styling synchronization, landing page design, and email design.

Next Steps:

To see the system in action you can schedule a live demo by clicking the following link:

[Click Here to Schedule a Demo](#)