Chapter 15: Practice Marketing

What is marketing?
Marketing is a system of activities that identifies and satisfies consumer needs and wants.

Marketing is:
• a management discipline
• an integrated process
• consumer oriented
• ongoing
Marketing is not:
• simply public relations, advertising, or selling
• product oriented
• piecemeal or periodic

The need for dental care far exceeds the current demand for dental services. The ultimate goal of marketing is to convert unmet need into demand.

Marketing professional dental services
The marketing mix for professional dental services includes:
• product (dental treatment)
• price (fees)
• place (office environment)
• promotion (visibility)
• people (dental team)
• payback (results)
• policy (consistency)

Product vs. service marketing
You are marketing a service, not a product. There is a big difference between the two.

Product marketing
Suppose you order a clock from Marvin's Mail Order House. The clock arrives and works perfectly. You don't care that Marvin is running the business out of his cramped basement. You don't care that Marvin needs a personality transplant. You sent away for a product and you are satisfied with the product you received.

Service marketing
Now suppose that you hear that the Great Restaurants of the World Association has called Jean-Claude's French Restaurant a truly outstanding establishment with sensational food. You make a reservation at Jean-Claude's to celebrate a very special occasion. But when you arrive the snooty maitre d' has no record of your reservation. You are invited to have a drink in the bar, where the surly bartender keeps confusing your drink order. Two hours later, you are seated at a noisy table near the kitchen door. The waiter doesn't know much about the menu and disappears for long stretches of time. He provides poor service when you finally flag him down. You wait one hour between the salad and the main course. When your dinner finally arrives, it is delicious, but you resolve never to visit Jean-Claude's again.

In the first example, product marketing succeeded because the customer was satisfied with the product. Period. It's just that simple.

The second example is more complex. How good was the food at Jean-Claude's? It was delicious, but the service was poor.

In the customer's mind, the product (food) is indistinguishable from what marketing experts call the distribution channel. In this case, the customer's entire experience at the restaurant (not just the food) shaped their view of the restaurant.

Even though Jean-Claude's had great food, the customer will confuse the product with the “distribution channel” and never return to that restaurant.

There is a lesson here for dental professionals. Patients do not have the expertise to judge the quality of your work with the trained eye of a board examiner. Instead, patients judge your clinical competence based on the service you provide. If you fit a patient with a great crown but fail to provide all the components of great service, then you, like Jean-Claude, will have difficulty attracting and keeping customers.
How do you provide excellent service to patients? You do so by being aware of patient expectations.

The patient expects the dental team to be:
- on-time
- considerate
- caring
- empathetic
- professional
- interested in ME
- non-threatening
- friendly
- respectful
- communicative

Most important, the patient expects the dental team to be consistent in all of the above.

You are on stage, in the public eye. Don’t say or do anything in the dental office you wouldn’t say or do on a stage in front of a theater full of people.

Eight patient turnoffs in the dental office:
1. Talking about the patient instead of to the patient.
2. Ignoring a patient who is standing at the reception desk.
3. Failing to remember that most patients can see and hear.
4. Criticizing other members of the team—or other patients—in front of a patient.
5. Failing to answer the telephone by the second ring.
6. Not knowing a patient’s name when he or she arrives; misspelling a patient’s name on the statement.
7. Failing to inform before you perform.
8. Sending mixed signals on fees and payment options.

Price (Fees)
Your fees should be reasonable, and you should be comfortable with your fee schedule. Above all, never apologize for your fees. Stress the benefits and value of your services, not the cost.

When patients decide to accept treatment, they are accepting not only the procedure, but you as a professional. You are not selling amalgams or crowns; you are providing a professional service.

When the patient asks why one crown “is so expensive,” stress the service provided and value for the dollar. Explain that the crown will be custom made solely for that patient (and that tooth). After a dental office takes an impression of the tooth, it is sent to a dental laboratory where a team of skilled technicians prepare the model work, wax the crown, fabricate the metal framework, build porcelain, glaze, fire and polish the finished product. After each process the technician checks the crown for quality control. Explain that because the crown will be cemented in place, it will function like a natural tooth and that it is designed to specifically resolve your problem. Explain how the fabrication and placement of the crown involves the combined skill of an entire team of dental professionals all working together to provide the patient with the best possible care.

Place (office environment)

Your image and your message
Long before a patient sees you, they will have the opportunity to form an opinion of you and your practice. Your office environment will shape patients’ first impression of your practice.

What do each of the following say about the dental practice? (Each statement refers to a different practice.)

1. Although the practice is very busy, the reception area is seldom crowded.
2. Among the magazines in the reception area are Entrepreneur, Inc., The New Yorker and The Atlantic.
3. The bulletin board has numerous patient photographs
4. All patients are routinely given a refrigerator magnet and a giant toothbrush imprinted with the doctor’s name and phone number.
5. A chair in the reception area has a small tear in the upholstery that has been there since last Christmas.
6. Some of the operatory walls are covered with Mickey Mouse murals.
7. The potted plant in the reception area is dead.
8. The rest room is clean, but smells like disinfectant.
9. The receptionist works in a glass-enclosed cubicle.
10. The dental office does not appear to have a dress code for the dental team.

As you can see, your office environment is continually sending messages to your patients. What does your office environment say about you? Make sure that your office is communicating the message you want to send.

**Promotion (Visibility)**
Visibility and image are two key factors in building your practice and servicing your patients. To build visibility and image you should promote your practice through targeted and effective communications. This can be done by creating a message about your practice that you communicate consistently through a variety of communication vehicles such as:

- local media
- direct mail - with and without coupons
- practice brochures
- newsletters
- electronic newsletter
- practice web site

Your message should quickly communicate the specific services your practice provides, reflect the unique personality of your practice and reflect a sensitivity to the needs and values of your target audiences. Sample messages could be:

- We offer cosmetic dentistry utilizing the latest in high-tech equipment in a service-oriented environment
- We provide family dentistry and offer convenient scheduling with evening and weekend hours

An action plan for communicating your message for the purpose of increasing the recognition and goodwill of your practice encompasses four major steps:

- Create an identity
- Build patient relationships
- Connect with your community
- Access the media

**Creating an Identity/Market Brand**
The process of translating your image into visual, tangible representations is called creating an identity. These representations must be integrated into all aspects of your marketing communications. The following activities are suggested ways to help create your identity:

- Develop and liberally distribute practice business cards.
- Develop a practice brochure and distribute to new patients or at speaking engagements.
- Provide current reading material in your reception room that appeal to your particular mix of patients.
- After treatment, give toothbrushes, dental floss holders, sugarless recipes, etc. with your name and logo on them to all your patients.
- Keep up on nutritional news so that you can advise patients on healthy eating habits.
- As patients are dismissed, have the chairside assistant give them his or her own business
card saying, “Please call me personally if you have any questions about your treatment and I’ll make sure the doctor gets back to you.”

- At the front desk, have the receptionist give patients her business card so they can contact her directly about appointment and financial arrangements.

- Send handwritten notes on your business stationery displaying your logo acknowledging special patient events, e.g., birthdays, weddings, graduations.

- Put up a neatly framed photograph of you and your staff with biographical data.

- Frame a picture(s) of any pro bono work you have done.

- Use fun, everyday ideas and be creative.

- Include your practice website on all correspondence.

Build Patient Relationships
Excellent patient relationships help ensure that your patients talk about you and your practice positively, leading to increased patient referrals. The best way to build patient relationships is by providing both expert dental treatment and friendly personalized service. Listed below are some ideas to help build patient relationships:

- Offer coffee, tea, or other beverages to patients who are waiting.

- Have a basket of fresh fruit at the front desk with a note to “Take one.”

- Be on time. If you are running late, have your receptionist telephone your patients to let them know, so that they can make changes in their own plans or reschedule, if necessary.

- Always greet all of your patients by name.

- Block enough time for new patient exams to really visit with the patient and make sure they understand your philosophy of dentistry and you understand their needs.

- Install a music system for patients in the treatment rooms.

- Take clinical photographs of the patient’s teeth and let them see firsthand what their dental needs are.

- In the evening, take home the telephone numbers of patients who underwent extensive treatment that day and call them to see how they are doing.

- Install a “goodbye” mirror near the patient exit so they can check their appearance before leaving the office.

- Send condolences and/or flowers to the family of a deceased patient.

- Send cards recognizing a patient’s wedding, graduation, etc.

- Give a picnic, barbeque or other outdoor event during the summer for your patients.

- Recognize patients for taking good care of their mouths by offering certificates, ribbons, balloons, toothbrushes, toothpaste, etc.

Connect With Your Community
Community outreach efforts and participation in community events generate awareness and visibility of you and your practice in your local service area. The following are some activities to assist you in connecting with your community:

- Hold an open house for patients to show off a new office, meet new staff or celebrate your practice anniversary.

- Volunteer to speak before community groups, school groups, neighborhood associations, etc.

- Get acquainted with community leaders.

- Join civic organizations.

- Introduce yourself to local pharmacists, optometrists, pediatricians and physicians and provide them with your business cards.

- Patronize your patients’ businesses.

- Run for public office.
• Teach a class in oral health at the community center.
• Take adult education courses and let people in the class know you are a dentist.
• Participate in career days for area students.
• Encourage your staff to participate in local health/sports fairs.
• Offer to present a noontime presentation on dental health to local companies.
• Cultivate relationships with every receptionist and office manager in your building.
• Establish communication with the referring professional office when a new patient makes an appointment. Be sure to send the referring dentist/patient a thank-you note for the referral.

Addressing Diversity in Your Practice

Our world is becoming more diverse than ever before. Building lasting relationships with your patients will be easier if you understand their diverse backgrounds. You may wish to gather some demographic information on your current patients to learn more about their lifestyles and use of dental services. The method you use to get this information can be as “formal” or “informal” as you like. You can include a few questions on age, gender, marital status, etc. on your patient history form. Or, if you would like more in-depth information, you may want to conduct a patient survey.

Some questions you may wish to consider are:
What is the general demographic makeup of the community in which you practice? How has that changed in the past five years? How do you see it changing in the future? What is the marital status or family makeup of the patients in your practice? Do you see mostly singles with no children? Married people with kids? Single patients? Stay-at-home parents or two working parents?

These are all questions that need to be answered in order to understand how your practice meets the needs of the people/patients around you. After you’ve gathered this information about your current patients, there are several ways – both large and small – that you can address practice diversity.

• Establish office hours based on the needs of your patient population and their jobs. What types of jobs/hours do the majority of your patients work? Your patients may be predominantly white-collar workers who work 9-5. Or maybe you have a patient base that does more shift work or works from home. Whatever the case, the hours your patients are available for appointments is important. If you see a number of patients who work typical 9-5 hours, you may want to accommodate their schedules by offering evening or weekend hours.

• Keep your office uncluttered so patients with physical disabilities can negotiate the area (consult applicable provisions of the American With Disabilities Act).

• Hire bilingual staff if the majority of your patients are from a particular ethnic group.

• Post your payment policy near your reception desk, written in both English and the primary language of the majority of your patients.

• Print health history forms, appointment reminder cards, patient education brochures and waiting room material in both English and the primary language of the majority of your patients.

• Block appointments for families. Families with several children may appreciate being able to schedule appointments for the entire family at one time.

• Hang art that reflects artists/subjects of various ethnic and religious groups.

• Provide an area of the waiting room for children if appropriate.

For more information, see Multicultural Communication in the Dental Office, developed by the Center for Continuing Education and Lifelong Learning and the Department of Salable Materials.
Communication Skills Summary

No matter what your practice size, neighborhood, or specialty, communication skills are essential to your marketing plan. Why? Because patients place top priority on the emotional aspects of the care you provide.

**Interpersonal Skills**
1. Each patient will perceive your communication style differently.
2. Each patient will interpret your words and actions in a unique way.
3. Understanding must not be assumed, it must be earned.

**Listening Skills**
1. Build in time for listening
2. Make the environment conducive to listening
3. Be careful of “deaf spots,” complex or vague topics, and your emotional reactions to the patient or the subject matter.
4. Suspend evaluations and judgments until the whole story is out.
5. Don’t interrupt.
6. Don’t plan your answer while the patient is talking.
7. Concentrate. Keep the patient as the central focus of your attention.
8. Use encouraging reinforcements.
9. Ask for clarification when you are not SURE you understand a patient.
10. Paraphrase what the patient has told you to double check your understanding.

**Speaking Skills**
1. Prepare yourself. Record brief notes of each patient’s visit, then review the file before the next visit.
2. Use specific terms.
3. Use patient’s language.
4. Explain instruments and procedures.
5. Talk up the benefits of treatment.
6. Use as many communication channels as possible.
7. Communicate one idea at a time.
8. Use analogies and examples.

**Nonverbal Skills**
1. Your patients receive more meaning from your nonverbal communication than from the words you use.
2. When verbal and nonverbal messages conflict, the nonverbal message will be believed.
3. Nonverbal communication expresses not facts, but feelings and attitudes.
## Telephone Technique Quiz

<table>
<thead>
<tr>
<th>The telephone rings…</th>
<th>Always</th>
<th>Usually</th>
<th>Rarely</th>
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<tbody>
<tr>
<td>I answer before the third ring.</td>
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<tr>
<td>I use the pencil and paper beside my telephone for notes.</td>
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<td>I usually answer my own phone.</td>
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<td>I smile as I speak to the caller.</td>
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<td>I can picture the caller in my mind.</td>
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<td>I am anxious to know who is calling and how I may help.</td>
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<td>It is easy for me to begin a conversation with the caller.</td>
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<tr>
<th>I pick up the receiver and…</th>
<th>Always</th>
<th>Usually</th>
<th>Rarely</th>
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<tbody>
<tr>
<td>I give the caller the name of the doctor’s office and my name.</td>
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<td>I listen without interrupting while the caller speaks.</td>
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<tr>
<td>I quickly find out the reason for the call.</td>
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<td>I offer to help the caller.</td>
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<tr>
<th>During the conversation…</th>
<th>Always</th>
<th>Usually</th>
<th>Rarely</th>
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<tr>
<td>I speak pleasantly despite pressures.</td>
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<tr>
<td>I don’t use trite expressions or slang words.</td>
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<td>I make notes regarding the call (name, appointment, etc.).</td>
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<tr>
<td>I use the caller’s name.</td>
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<tr>
<th>At the conclusion of the call…</th>
<th>Always</th>
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<th>Rarely</th>
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<tbody>
<tr>
<td>I thank the patient for calling.</td>
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<td>I can end the conversation without sounding abrupt.</td>
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<tr>
<th>Concerning telephone techniques generally…</th>
<th>Always</th>
<th>Usually</th>
<th>Rarely</th>
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<tbody>
<tr>
<td>My speech and meaning are clear to my callers.</td>
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<tr>
<td>I can remember names and voices of my patients.</td>
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<td>Difficult patients are easy for me to handle.</td>
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<tr>
<td>Regardless of age or position, I am comfortable in conversation.</td>
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<tr>
<th>And, finally…</th>
<th>Always</th>
<th>Usually</th>
<th>Rarely</th>
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<tbody>
<tr>
<td>I return calls promptly.</td>
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<td>I leave messages where I may be located if I am away from my desk.</td>
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<tr>
<td>I gather as much necessary information as possible when I take calls for other.</td>
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<tr>
<td>I call the answering service/machine frequently to check on its quality and accuracy.</td>
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**Rate yourself:**

2 points for each always

1 point for each usually

**Score:**

40-50 Excellent

30-40 Good

20-30 Needs improvement
Dear Patient:

I enjoyed meeting you recently, and I wanted to thank you for selecting me as your dentist! My team and I have a commitment to preventive dentistry and we look forward to helping you maintain good oral health.

I hope you enjoyed the high-tech features of our dental office, including our multiple TV screens in the waiting room and intraoral camera in the operatory that allowed you to see your teeth as we examined them.

Remember to check out our latest patient convenience tool — a new website (name of practice website) complete with practice news and the latest tips on oral health care for you and your family. Be sure to log on at website address the next time you’re online.

Regular dental care is the basis for preventive dentistry. Through regular check-ups and a thorough home oral hygiene program, you can look forward to lower dental costs and a lifetime of healthy smiles.

Thank you again for allowing us to provide you with the best in dental care!
I look forward to seeing you at your next visit.

Sincerely,

Dentist
New Technology, Digital X-ray

Date

Name
Address
City, State Zip

Dear Patient:

Patient service is our number one priority, and we realize that you have many options when it comes to dental care. For this reason, we make it a point to purchase the latest in dental technologies to better assess your oral health.

We’re excited to tell you about our new, high-tech digital x-ray machine. It allows our team to take an x-ray image of your teeth and almost immediately have the digital photo up on a TV monitor for review. Then I can rotate the image quickly and easily to explain which teeth I may want to examine further.

It’s not just the ease and convenience that you’ll love. The digital x-ray also has the following benefits:
• Your dental exams should take less time since there isn’t any x-ray film to process
• Your exposure to x-rays is greatly reduced
• Bigger, colorful images will make it easier to understand your treatment
• X-ray fees will be reduced since we do not need chemicals and film to process your x-rays (plus, it reduces hazardous waste in the environment)
• You can also take home a lovely photo of your teeth!

If you’d like to make an appointment to check out the new digital x-ray, please call our office at office number. We think you’ll be impressed with this progressive technology. Again, thank you for choosing practice name. We appreciate you!

Sincerely,

Dentist
Continuing Care Past Due

Dear Patient:

It is time again for your dental check-up and cleaning. Our records indicate that you have not been in our office since time. Regular dental visits are necessary to maintain good oral health and to prevent unnecessary expense. We think you'll agree that this preventive maintenance will benefit your overall health in the long run.

During your dental check-up, we can check for tooth decay and gum disease in their earliest stages, when they're most preventable. We will instruct you in proper brushing and flossing techniques, two key preventive measures in your oral hygiene program. We'll also professionally clean your teeth to remove stains and tartar that are difficult to reach. By the end of this visit, you'll be smiling your brightest.

We want to ensure that you receive the very best dental care! Please call us today at office number to schedule an appointment.

Sincerely,

Dentist and Team

P.S. Be sure to check out our practice website at website address! It has the latest practice name news, plus dental care tips for adults and children.
Dear Patient:

It has been over a year since your last dental visit. You are a valued patient and we would like to know how you are doing!

Periodic oral examinations are essential to maintaining good overall health. Regular dental visits allow us to detect gum disease and other medical conditions in their early stages, when they are most treatable. Studies continually point to the relationship between dental health and overall health. For these reasons, regular dental visits can be an invaluable preventive health measure.

Regular visits also allow us to clean your teeth and introduce advances in dentistry that can help your smile look its best.

We have set up a time frame appointment for your continuing care.

Please call us at office number if this appointment time needs to be rescheduled or to let us know that you are receiving dental care from another practice. We are concerned about your dental health, so we hope to hear from you soon.

Sincerely,

Dentist and Team

P.S. In an effort to serve you better, we’ve created a name of practice website, complete with the latest practice news, plus oral health care tips for you and your family! Be sure to check it out at name of website.
The dental team is an integral part of successful practice marketing.

Accessing the Media
Exposure in the local print, radio and television media in a good way to build a positive awareness of you and your practice in your service area. Accessing the media can include the following activities:

- Place announcements of new practice openings or staff additions in the local newspaper.
- Offer to write a monthly column on dental health in your local newspaper.
- Buy ad space in the local school yearbooks.
- List yourself in the Yellow Pages.
- Develop a special interest news story about yourself relating to an accomplishment, special interest or hobby.

People (dental team)
The dental team is an integral part of successful practice marketing. Take time to regularly discuss your goals for the practice with the dental team.

Some suggested topics for staff management meetings:
1. Identify what you are doing right.
2. Make the practice setting more comfortable.
3. Analyze roles of each team member.
4. Review positive and negative comments heard (or overheard) during the previous month.
5. Deal with uncooperative patients.
6. Deal with patient complaints.
7. Review your billing and collection system.
8. Formulate office rules that everyone helps to write and everyone agrees to follow.
9. Discuss practice building techniques, including asking patients for referrals.
10. Discuss how the new or potential patient can be made to feel special from the moment he or she first has contact with the practice.

Research tools
On the last page of this chapter you will find three research tools that can help give you valuable insight into patient needs and their views of your practice.

Patient survey
Send this survey to your patients of record or hand it out to at least 100 patients in the office to find out their perceptions of your service. In service marketing, perception is reality.

Composite patient profile
Randomly select 200 patient files (e.g., every 10th patient file) and record information such as age, sex, occupation, marital status, etc. Compile this information using the composite patient profile and you will have a clearer understanding of who your patients are.

Patient cheat sheet
Use this form to record pieces of pertinent information that will help you relate to your patients as individuals. Record information such as the patient’s hobbies, children’s names and ages, and other tidbits to jog your memory and help you get to know your patients better.

Target Marketing
Market segmentation involves dividing the total potential patient population into different groups based on certain criteria. Market segmentation should:

- identify different individuals who may need your services;
- have sufficient size to warrant the effort and expense;
- examine the potential for this segment to grow;
- determine whether room for competition exists within this segment;
- consider whether there are needs to be fulfilled.
Examples of target markets
• Adults ages 50-65 with awareness of cosmetic dentistry
• Spanish-speaking patients
• Two-income patients with children ages five-15

Demographic data on population groups located in a specified radius from your office may be purchased from a variety of sources.

Referrals
Many dentists agree that referrals by satisfied patients are an important source of new patients. Current research indicates that 65.6% of dental patients located their dentist through word-of-mouth referral from a friend or relative. But is it OK to ask for referrals? Yes, marketing experts agree, as long as you ask tactfully. Here are three scenarios that will help you graciously ask for referrals.

Dental assistant to patient: “Our dental practice has grown almost exclusively by word of mouth. We like it that way because our patients are nice people, and they tend to associate with other nice people. Our best patients are referred by our best patients. You’re such an enthusiastic participant in your own dental health, I wonder if you’d help spread the word to your friends who are looking for a dentist.”

Dental hygienist to patient: “People often think that dentists with an established practice can’t take new patients. That’s not so — our practice welcomes new patients. If you know of someone with a dental problem who needs a dentist, why not tell them what modern dental treatment can do for them? We’d be pleased if you referred your friends to our practice.”

Dentist to patient: “Many people don’t visit a dentist until dental disease prompts an emergency visit. These people pay more in treatment fees and discomfort than they should. If you know of someone who is neglecting regular dental visits, and if you think they’d be happy in our practice, please refer them to us.”

These are ideas, not scripts. Incorporate these approaches into your practice but use your own words and pick the best time so that you sound relaxed and natural.

How not to ask for referrals
Sound desperate: “I badly need more patients. If only my trusted patients would tell their friends, things would be better for me.”

Your patients value you because they value your ability to solve their problems. Never make your patients feel responsible for solving your problems. Otherwise, being your patient will seem more of a burden than a pleasure.

Sound incompetent: “I just can’t seem to get enough referrals. What do you suppose I’m doing wrong?”

Good doctor/patient relationships are based on trust and confidence, which are difficult to build and easy to destroy. If you communicate feelings of insecurity and self-doubt, your patients will begin to question their confidence in you — hardly a basis for referring their friends.

Be ungrateful: “I’m pretty busy, but I guess I can squeeze in your mother.”

Remember, your patients are doing you a favor when they make a referral. Don’t make them feel as though they are imposing on you; they may just decide to impose on someone else.

Payback (Results)
As your dental practice grows, you will want to consistently track the results of your marketing efforts. You may wish to do this quarterly or semi-annually. For example, if you send out a marketing brochure, you will want to closely monitor the number of new patients or increased use of services that you see over the next several months. Make sure that your new patients indicate on their health history form how they heard about your practice as well as important demographic information.
You can track the results of your marketing efforts by compiling data on the following:

- the number of new patients
- the number of new services utilized
- which method patients used to find you (referral, Yellow Pages ad, dental health plan directory, etc.)
- patient demographics (where they live, age, income level, ethnic or cultural group, family makeup)

By evaluating this information, you will see whether your marketing efforts are reaching your target audience. You will also see where you may need to heighten your marketing efforts. Using data and demographic tools can help you improve return on your marketing investment.

**Legal Considerations**

Advertising is governed by both federal and state law. Perhaps the central point for both is to make sure your promotional efforts are neither false nor misleading. If your ads are truthful, your legal exposure is minimized. In addition, follow restrictions or disclosure requirements imposed by self-referral and other laws.

Most state dental practice acts prohibit dentists from engaging in false, misleading or deceptive advertising. Many state regulations place certain restrictions on the use of a trade or fictitious name by a dental practice, such as a requiring a dental office operating under a fictitious name obtain a permit. In addition, the Federal Trade Commission (FTC) consistently monitors ads and publicity efforts, seeking situations that contain bait-and-switch tactics; deceptive demonstrations or prices; defamation of the competition; fraudulent contests or testimonials; misleading, exaggerated or unsubstantiated claims and misuse of the word “free.”

**Policy (Consistency)**

Any successful dental office must have a consistent, defined and systematic way of handling various office situations. One of the best ways to educate your staff about office policy is through an employee handbook. This handbook would cover employee roles and responsibilities as well as general practice philosophy. You may wish to review this material during employee orientation and periodically during staff meetings.

Some examples of office policies include the following:

- The receptionist will confirm each patient visit with a phone call.
- Appointments must be cancelled at least 24 hours in advance.
- Payment must be made at the time of treatment.
- Patients must update their health history form at each visit.
- Patients must be notified if their wait in your waiting room will be longer than 10 minutes.
- Office staff must not wear any perfume/cologne since some patients have allergies.
The following American Dental Association Marketing Publications are available through the Department of Salable Materials, 1-800-947-4746:

Dental Letters with Impact! 2004
The Power of Internal Marketing, 2004
The Ultimate Dental PR Kit, 2002
Develop a Dynamic Website For Your Practice, 2003
Multicultural Communications in the Dental Office, 2006

The ADA also has some resources available. Please contact them at, 1-800-621-8099, extension 2662 for a Marketing Resources Packet, which includes the two resources below:

Marketing Resources Guide, 2001
Surveys for the Dental Practice, 2002

The ADA also offers another dental practice marketing resource called ADA Intelligent Dental Marketing™. Call toll-free at 866-859-1999 or visit www.adaidm.com.

The following publications are available through the Department of Library Services of the ADA, 1-312-440-2655:


Marketing of Health Services, Packet of Articles. Department of Library Services, American Dental Association, 1-800-621-8099, x2653 or visit www.ADA.org/prof/resources/library/forms.asp and click on Reference Packet Request Form.

Other Marketing Resources


Dental Graphics online at www.google.com. Click on “Images” tab and then type in the word “Dental.” The URL is: http://images.google.com/images?q=dental&ie=UTF-8&hl=en

Other Resources

American Marketing Association, www.marketingpower.com
Patient Survey

Directions: Please take a moment to complete the following questionnaire. For questions 1 through 24, mark the box which most closely matches your response to the statement. The remaining questions on the next page are self-explanatory.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Whenever I phone the dentist's office I receive prompt, courteous attention.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>2</td>
<td>All members of the office staff are friendly and courteous.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>3</td>
<td>The dentist listens carefully to me.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>4</td>
<td>The dentist spends enough time with me.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>5</td>
<td>The dentist explains things to me in plain, simple English.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>6</td>
<td>The dentist always seems to remember me from visit to visit.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>7</td>
<td>The dentist and his staff look professional.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>8</td>
<td>I wouldn’t consider changing to another dentist.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>9</td>
<td>I rarely wait too long once I arrive at the office.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>10</td>
<td>The dentist helps me control my fears about treatment.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>11</td>
<td>The office location is convenient.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>12</td>
<td>It's easy to find parking close to the office.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>13</td>
<td>The office hours are convenient.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>14</td>
<td>The dentist's office is easy to find.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>15</td>
<td>The dentist's office is clean.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>16</td>
<td>The reception area is comfortable.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>17</td>
<td>The dentist always discusses fees with me before treatment begins.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>18</td>
<td>Considering everything, the dentist's fees are reasonable.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>19</td>
<td>The dentist is willing to discuss special payment terms.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>20</td>
<td>The dentist's payment terms seem reasonable.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>21</td>
<td>The dentist and his staff are gentle, careful, and competent.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>22</td>
<td>I can get an appointment with the doctor on short notice.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>23</td>
<td>The dentist and staff have taught me a lot about taking good care of my teeth.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>24</td>
<td>Overall, I am quite satisfied with the care I receive in this practice.</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td>25</td>
<td>I visit the dentist:</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td></td>
<td>☐ every 3 or 4 months.</td>
<td>☐ every 6 months.</td>
</tr>
<tr>
<td></td>
<td>☐ every 18 months.</td>
<td>☐ every 2 years.</td>
</tr>
<tr>
<td>26</td>
<td>I should visit the dentist:</td>
<td>☐ ☐ ☐ ☐</td>
</tr>
<tr>
<td></td>
<td>☐ every 3 or 4 months.</td>
<td>☐ every 6 months.</td>
</tr>
<tr>
<td></td>
<td>☐ every 18 months.</td>
<td>☐ every 2 years.</td>
</tr>
</tbody>
</table>
28. I would be interested in nonclinical services such as (Check as many as you wish.)
☐ nutrition counseling.
☐ counseling to overcome anxiety about dental treatment.
☐ educational programs and activities for children.
☐ child care service in the dentist office, so that I can bring my children when I have an appointment.
☐ transportation service to and from the dental office.
☐ other
29. The things I like the most about this dental practice are:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

30. The things I like the least about this dental practice are:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Thank you.

---

**Composite Patient Profile**

**Total patient sample size____________**

<table>
<thead>
<tr>
<th>Total patient sample size</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
</table>

1. **Sex:**
   - male
   - female

2. **Age:**
   - 0-5 years
   - 6-17 years
   - 18-35 years
   - 36-50 years
   - 51-65 years
   - over 65 years

3. **Marital Status:**
   - single
   - married
   - divorced
   - widowed
   - not appropriate (age 17 and under)

4. **Number of children:**
   - none
   - 1
   - 2
   - 3
   - 4 or more

5. **Education:**
   - less than 4 year high school
   - high school graduate
   - less than 4 years college
   - college graduate
   - more than 4 years college
<table>
<thead>
<tr>
<th>Number</th>
<th>Percent</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Household income:</td>
<td></td>
<td>12. Distance travelled:</td>
<td></td>
</tr>
<tr>
<td>less than $20,000</td>
<td></td>
<td>less than one mile</td>
<td></td>
</tr>
<tr>
<td>$20,000-$29,999</td>
<td></td>
<td>1-5 miles</td>
<td></td>
</tr>
<tr>
<td>$30,000-$39,999</td>
<td></td>
<td>6-10 miles</td>
<td></td>
</tr>
<tr>
<td>$40,000-$49,999</td>
<td></td>
<td>more than 10 miles</td>
<td></td>
</tr>
<tr>
<td>$50,000-$74,999</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$75,000 +</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 7. Occupation: | | 13. Frequency of visits: | |
| child/elementary student | | 3 or 4 times a year | |
| secondary student | | twice a year | |
| college student | | once a year | |
| homemaker | | once every 18 months | |
| retail | | once every 2 years | |
| technical | | less often than every | |
| managerial | | 2 years | |
| trades | | | |
| clerical | | | |
| professional | | | |
| executive | | | |
| retired | | | |
| unemployed | | | |

| 8. Last dental visit | | 14. Length of association with practice: | |
| less than one year | | less than 1 year | |
| 1-2 years | | 1-2 years | |
| 3-4 years | | 3-4 years | |
| more than 4 years | | 5-6 years | |
| | | 6 or more years | |

| 9. Payment assistance | | 15. Services required: | |
| dental insurance | | preventive | |
| Medicaid | | minor restorative | |
| Other | | major restorative | |
| | | other | |

| 10. Referred by: | | 16. Special needs: | |
| patient | | none | |
| staff member | | physically handicapped | |
| other dentist | | very aged | |
| other health professional | | difficult child | |
| other | | other | |

| 11. Travel to office from: | | | |
| home | | | |
| work | | | |
| shopping | | | |
| school | | | |
| other | | | |
Patient “Cheat” Sheet

1. Prefers to be called: ______________________________________________________________________ Name

2. Family Yes No
   a. Married ________ ________
   b. Children ________ ________
   c. Children Names and Ages:
      ___________________________________________________ __________________________________
      ___________________________________________________ __________________________________
      ___________________________________________________ __________________________________

3. Employment or Schooling
   a. Works for: __________________________ c. Attends: ____________________________________
   b. Type of job: __________________________ d. Year: _______________________________________

4. Values/Lifestyles:
   a. Hobbies/Interests: _____________________________________________________________________
      ____________________________________________________________________________________
      ____________________________________________________________________________________
   b. Personal information: __________________________________________________________________
      ____________________________________________________________________________________
      ____________________________________________________________________________________

5. Relationship to Practice:
   a. Years in our practice: ________
   b. Names and dates of new patients referred:
      Name                        Date
      ___________________________________________________ ______________________________
      ___________________________________________________ ______________________________
      ___________________________________________________ ______________________________
      c. Patient was asked to refer to practice by:
      Staff Name                  Date
      ___________________________________________________ ______________________________
      ___________________________________________________ ______________________________
      ___________________________________________________ ______________________________

This sheet is to be kept on inside front cover of patient chart and updated each visit if personal information or insight into patient is gained.