

Ep #25: Are You Vulnerable?



Full Episode Transcript

With Your Hosts

Dr. David Phelps and Evan Harris

[Dentist Freedom Blueprint](http://www.DentistFreedomBlueprint.com) with Dr. David Phelps and Evan Harris

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You are listening to the *Dentist Freedom Blueprint* podcast, with David Phelps and Evan Harris. Navigating you through the uncharted waters of a turbulent economy with straight-forward advice to, transform your practice into a self-sufficient cash machine, compound your net worth assets, and multiply, multiply, multiply your passive cash flow streams.

David: This is Dr. David Phelps with my good friend `Mr. Evan Harris, and Evan, I've been looking forward to talking to you again today this week. We've got, I think, a very, very good topic that our listeners are going to enjoy, but let me first ask you, how is your day going, sir?

Evan: David, the day is going well. I'm glad to be able to talk to you. I think I've got something fresh as far as this success story goes and also a failure story, and I hope to be able to peel back the layers here and give some value to our listeners.

David: Well, I'm looking forward to this, and I think the topic today, we'll just call it this, Evan. The question is are you vulnerable? Now, what do we mean by that? The question would be if your patients aren't thinking about you at least once a month, are you vulnerable? Evan, I'll let you take off with that.

Evan: Sure. You know, I came from a practice earlier that we were talking about new patient flow, and the doctor said, "You know, I've been concerned about the new patient flow." I said, "Okay, how so?" He says, "Well, we've been factoring how many patients have been moving away and dying, and then how many patients are new and coming into the practice." I said, "Okay, what's your monthly average?" He says, "Negative three." I said, "Did you say negative three?" He says, "Yep, negative three."

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"Wow, okay." He had five leave, and two newcomers, so he did the math right: Negative three. I began to ask the question: How are your patients finding you? What are you doing? What ways are you touching and reaching out to that patient? He looked at me like "What do you mean?", and I asked, "Well, how do you stay in the forefront of their mind when they don't have an appointment?" He says, "They don't. We just tell them when their next appointment is, and we hope that they show up, and we sometimes call them the day before."

Okay, now this doctor's an older doctor and has been successful for many years, but I believe that in today's economy and today's just overall technologically advanced economy, people are getting a lot more messages per day than they used to. They might have gotten phone calls before they get home, and they have maybe two messages on their answering machine. Remember when we had answering machines, David?

David: Right, I sure do.

Evan: Well, I'm guessing that most people on this call probably get more than two messages ... Probably not on their answering machine if they still have one; that's pretty amazing, but they probably get more than two voice mails a day. This doctor was from a place of expecting to do the same thing over and over and getting a great result, and I feel like the proverbial cheese, so to speak, has been moved on that doctor and that doctor is realizing that they had better change what they do, or that negative three patient base monthly will quickly erode at what once was a healthy practice.

David: What you're talking about here, Evan, just so everybody's clear, is we're talking about your relationship right now with your existing patients; the patients who have come in and we would

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classify as being active patients. The problem that I think a lot of dentists feel today is that the only way to keep the schedule full is by continually looking to bring in new patients. Now, new patients are important. New patients or new clients or new customers are the lifeblood of any business, but we miss the boat by focusing just there, realizing too, that the cost of acquisition; that is whatever your source of marketing is, or just the intake process of bringing a new patient in, doing the workup, the medical, the dental, all the examinations, setting all of that up, there is a significant cost, and it takes time to build a relationship.

Now, that's all fine and good, but think about your existing customer patient base. That's where the real gold lies in terms of keeping your schedule busy, because those patients are not always thinking about us in the dental practice as much as we would like them to think about us. As you said, Evan, we're all busy. I'm busy, you're busy. There's so many things in my life that if certain businesses or vendors that are important to me didn't reach out to me in different ways; not just through an email or just a card in the mail, but different ways to stay in front of me, I'm going to forget, too.

It's the same way in our dental practices. We think it's all about us. We know how important our services are, but guess what? Our patients have lots of choices during the day, so the touchpoints that we're talking about here, and we'll go into more detail on, are all about your existing patients: Retention of the existing patients; bringing them back for the treatment that they know they want and desire, and then certainly there's the ability to reactivate patients. That's another whole area that we can spend a lot of time on, but let's just put it in the same position here, Evan, in that reactivating patients who maybe aren't considered active today, they've fallen off the radar.

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Maybe we gave up on them too soon. We don't reach out to them at all, but they still really don't have a dentist home. They haven't bonded; there's not a relationship there, so the things we're going to talk about today are all meant to enhance those touchpoints what I like to call is top of mind awareness. You want to be top of mind aware in your patients. They may not need you today or tomorrow or next week, but if you're there on a regular basis, then when they do think about you, they do want to take care of something that's maybe become more of an issue for them, now they're going to be ready to call you.

Evan: Absolutely. There's a doctor just minutes away from this doctor that had the negative three new patient monthly flow. The doctor got forty-five new patients; forty-five, David, and this doctor is not an insurance driven practice. They take insurance, but only the highest end ones. Forty-five, that they've got a major problem on their hands. They're actually raising their fees. They've now got an associate that works into the evenings. I think they work until 8pm, and they're going into Saturdays, but the doctor that owns the practice is actually working less. The doctor went from five days to four days, and some days ends early. On some days has I think some kind of a networking type of group, like Affinity type group, and has much more life balance. Their flow is at an all-time high, and they don't advertise.

Here's what they do: Is for them, they want to know their patient, and that comes from when the patient is there. When that patient comes walking in for the first time, they want to know as much as they can about that patient, or even on the phone. Certain questions such as their birth date; they're always going to ask that question, but other things such as their anniversary. They're going to know things like the anniversary of when they had their first dental appointment. They're going to know when Thanksgiving is. They know when there are certain

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things like summertime, all those kinds of things, and what I mean by that is they're putting in the computer as much as they can about this patient that they know automatically, and then also what they can find out by some questions.

Once they do that, they load that information into ... It's like a contact measure. There's a lot of different services out there. What they use is called RevenueWell. There's another one called Demandforce. There's a bunch of different ones out there. From what I've seen, I've seen RevenueWell work the very best and easiest, but there's a lot out there; go check them out. What they do is, they just key in okay, here's the patient's name, and it actually seamlessly integrates with their dental software. They happen to use Eaglesoft, and it just goes right in.

When they're typing in that patient and their birth date, it automatically goes into the RevenueWell product. It will say, "Do you want to send a text? Do you want to send an email?" They just click whatever settings they want for that patient, and then they fix it and they forget it, and automatically, that patient is now going to receive a birthday email. They know that patient, let's say, is a female and she's between the age of twenty-five to thirty-five. They can already craft one email for that age group, and they know that it's going to be filled with flowers, it's going to be filled with whatever they think is going to be cute and fun for that age group, and it's going to be totally different for the male that's sixty-five.

David: Right.

Evan: That patient gets that email, gets the text, or even they send glossy postcards. The cost of the postcard is ridiculously affordable, but it comes really classy. It looks like it's something special. I heard from this doctor that there's patients that will

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call at nighttime to say thank you for the birthday card, it was the only one they received.

David: Wow.

Evan: They get home from work, they open up the mail, and guess what's in there? Tons of bills, tons of junk. Probably a bunch of advertising with other dentists in there; other doctors, and then a birthday card that says, "Jim, Happy Birthday. Thanks for being a part of our practice. We are honored to have you part of our team," and on the front ... Let's say Jim is sixty-five ... It's got a classic woodie, one of those station wagon deals with a surfboard coming out of the back, and I'm guessing that speaks to him a whole lot more than maybe the twenty-three-year-old lady that might want something else. What I'm talking about is they didn't have to do a whole bunch of work. They set it up one time, and it goes all year. Then they set it up one more time for the next year, so that that guy that just got the woodie station wagon, the next year they get something else, but they only had to touch it one time.

Then they send out anniversary cards. Maybe not wedding anniversary, although they do that, too, but they do anniversary of joining the practice, so that patient is getting a notification: "Hey, David, thanks for joining our practice twelve years ago. A patient like you that's been with us this amount of time means the world to us. We'd be honored if we could be able to be introduced to your friends and family, so that we could serve them for twelve years as well." Now, that message is automated. It's all typed out one time, and the number twelve is the only part that varies, but there's no one having to type that in, because the software knows how long they've been a part of the practice. The doctor does nothing, the front desk does nothing other than set it up one time, and the patient feels special.

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David: The key here is just what you said: Setting it up one time. It's fully automated, so once it's done, it takes care of itself because of the customer relationship management software that you talked about. Dentists, you need to realize that this is marketing, and if you're not thinking about marketing today, this is again, what you've got to be doing. You've got to be differentiating yourself. Don't think of it as an expense; this is actually an investment, and these touchpoints are critical. If you think about the value ... And I don't always just talk about the value of a patient from a dollar standpoint, but if we're talking about business and business bottom line, the value of a patient increases by increasing your relationship with them because they'll come back more often. They will refer other like-minded, same type of characteristic patients that you want.

You can further segment your list, Evan, and you can even do more things if you think about it, for say your top twenty or top twenty-five percent clients. That's something that the team could do together; you know, develop what the characteristics are of your top twenty-five percent clients. Who are they? Where do they hang out? Why do you like to treat that particular segment of your patients maybe more than the rest of your base, and then think about doing more for those patients. That's where you ought to be putting your marketing investments. It's all part of, again, differentiating and positioning yourself.

You can also choose other dates, so you talked about anniversary and birthdays. You can go half-birthdays, but if you go to Google calendars and Google different dates of the year, you can probably come up with almost something going on, some kind of a special date for every day of the year, Evan. I mean, I've seen those, haven't you? Where there's ... And you can pick something in each month if you wanted to; you could actually have a theme every month. Maybe you decide to do it

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every other month, but the frequency is something that's got to be there. You've got to be consistent with this, and the patients will enjoy it when they get it on a birthday or an anniversary. We're having fun with maybe some of the other dates that are just entertaining, but it's personality again. It's part about you being there and them thinking about you in a different way. Again, the referral aspect can be enormous from setting up a campaign like this.

Evan: Absolutely, and it's something I've seen in addition to that, is they're able to send messages that are custom tailored to a potential need. What I mean by that is I have a doctor that began to expand into implants, and they wanted to be able to notify their patients that they provide implants now. Maybe the patient's perfectly healthy; the patient's seventy-two, their guess is they probably hang out with other people that are probably seventy-two, so they send out specific cards that are a little like ... Well, it's all automated, but they created it one time and it says something about "We proudly now provide implants," and then all about the benefits: Being able to fully chew and function, so the pretty lady eating an apple, etc.

They sent it out to people that were in the age range that they thought were going to be an implant candidate. Whether or not they were or not, they just thought an age range, because either they would need an implant or probably their friends in their life at some point would probably need an implant. The men received their type of publication and the ladies received theirs, and the overwhelming response was, "Wow! I had no idea that you provided implants." That was such an informative ... They do a lot of emails because emails are purely free, and they just blast out, "Hey, by the way, just letting you know we're proud to announce this doctor's got extensive education in this field and wanted to share what we're doing," and that made a big difference.

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A summertime whitening ... My gosh, who doesn't want a prettier smile, so the people that are in the twenty-somethings and thirty-somethings, they have their image. People that are in their fifties and better, they have their image, but it's just set up one time. Oftentimes, I have doctors that will hire one person to do that. They're looking to ... Let's say it's someone that's pretty handy with ideas and pictures; it's all in the software now. They can just cut and paste; all the pictures are there. They don't have to draw anything, they don't have to go searching for it. It's all there, so it's almost like you're selecting from hundreds of pictures, and they go, "That lady looks pretty. Let's put her on the card." It's just drag and drop.

They even have narratives ready to go. It's now expanding to Facebook and Instagram, where posts can be made on behalf of the doctor, where it's not something a doctor's having to create, it's already in que. Well, they'll que twelve months of information and every week, a post goes out, so it's fifty-two weeks and a lot of them now are already created, where they can select from a thousand different types of posts of education and most likely, the patient's not going to get that post from some other dentist. These are things that are dentist-specific, but the dentist looks like a hero, because they're the ones on the forefront of education and they're just that little touchpoint of "Hey, I've got something from my dentist today that talked about ways to make Halloween fun and safe for your kids. I'm going to read that." It may have nothing to do with teeth, but because the teeth are involved, we're going to write about it and hey, Halloween's coming up in a week.

David: I think the big "yeah, but" here, Evan, is going to be dentists listening to this today are going to say, "Sounds great, David and Evan, but sounds like a lot of work and I don't know where to start with this, and how am I going to get all this set up?" They forget that they probably have some very capable people

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on their team, or if you don't want to overload your current team, I think it's a wise thing for a dentist to think about having at least a part-time marketing director for your team. Marketing is so important today that you cannot overlook the fact that you need somebody dedicated, even if it's a few hours per week, but younger people who are very tech savvy with mobile and setting up CRMs and that kind of thing, they can research this all.

Again, the investment cost is really, really minimal when you think about the return on these touchpoints that are going to be seen by your patients and the referral virality aspect is going to be there as well. It's just something that the doctor needs not push back and think, "Well, when I get to it ..." It's something just to say, "Look, I'm going to do this, and I'm going to appoint somebody on the team, or I will bring somebody in on a virtual assistant basis to help me set this up."

You don't have to worry about knowing everything about how all this works. People that are savvy in the marketing arena today can translate what you don't know into what makes sense for your patients, and all you have to do is just set up a budget, but again, don't be stingy here. It's not a costly thing to set up. It's something that can be done easily, and the return on the investment, I promise ... And Evan, you already showed an example of two different doctors, one who wasn't doing anything, because they had just gone along in their practice year by year by year and had done okay, but times are different today. Then the other doctor's office just a relatively short distance away, who is being overrun by patients, by just implementing some of these different strategies.

Evan: Agreed. I think the value of a new patient, I think the ADA says ... At least in dentistry ... Is thirty-five grand over their lifetime. Some might stay in the practice a year, some might stay in the

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practice twenty-five years, but just to think what is the value of just one new patient? I'm literally talking about these are hundreds of dollars being spent, not even thousands per month. Really, it's that small. The other thing is training is free. It's ridiculous. I have a doctor that doesn't even know how to check email. Literally, David, this doctor does not go on the computer. The doctor does dentistry and leaves. The doctor fly-fishes, does other things, but not technologically even interested. I mean, he's a brilliant guy, but just has no interest in that.

That doctor had the front desk get trained for free. Literally, the company that they chose does everything for them. Sets it all up, and then now, that front desk person can change it anytime they want, but for the most part, they set it and forget it; that's it. Doctor didn't even have anything to do with it other than approving: "Oh, that looks pretty. Yeah, send that. That sounds good, sure." They would print out what the message was going to be, like the birthday message, and the doctor's like, "Yeah, that sounds really nice, go ahead." That was it, so please know, doctors, we don't want any more work for you, but I would love to see more patients flow in your door to get to experience your practice, and it doesn't have to fall on your shoulders.

There's people at the front desk that would love to go do something different. Even assistants that maybe are saving up for a wedding, that want to take a break from being chair side; they'd love to do some of this, trust me, and you can pay them affordably. I have people that pay graduate students ten bucks an hour, that when they're done with school, oftentimes in that early afternoon, they come into the dental practice for two to three hours. They work on this, they're done. They can come in two days a week, so what are we talking about? Thirty bucks in a day, maybe sixty bucks in a week. Over a period of four weeks, two forty, plus the cost of the service. I mean, they're

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looking at five hundred bucks, and they get one patient. My God. My belief is that it's paid for and then some, and the patients that are already in the practice feel more connected, too. They're seeing their doctor be progressive. They're feeling important, and they'll tell other people about you.

David: Good stuff, Evan. The point is that marketing is one of the most important places that a dentist can invest today, outside of CE and keeping up with technology, again, important, but marketing, dentists have got to learn how to invest in marketing without having to do it all themselves. You've laid it out well today, Evan. Your examples were spot-on. I just hope that more dentists will actually take this information and not just hear it, not just nod their head and say, "Sounds pretty good," but actually go implement something. Do something positive on your marketing and your touchpoints. Do something this next week. Get it done. Talk to one of your staff members, they'll love to do it. Evan, it's been great chatting with you today. I think you brought to the forefront a very, very great topic today to discuss. I want to ask those who are listening to subscribe to the iTunes download to give us reviews, and share this with others who might also find this information helpful. We're all about creating more freedom, more options in our dentist's life.

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