

The Ultimate Dental Practice

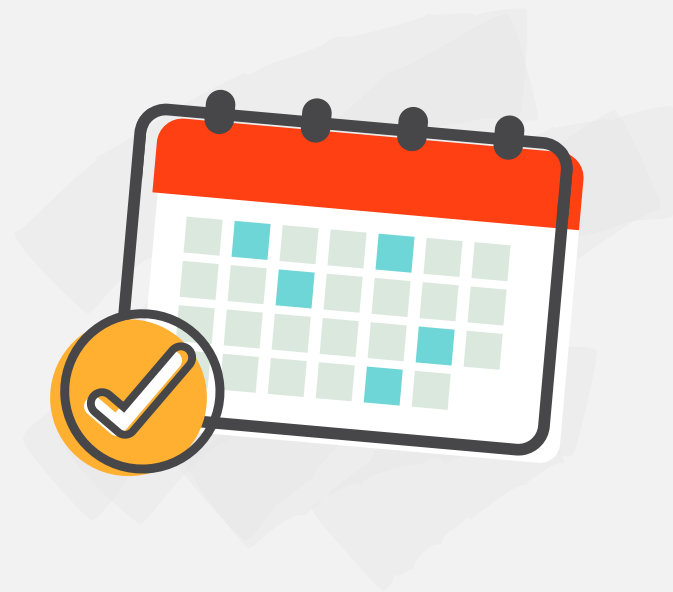
# Retention Marketing Guide



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# Introduction



## We want to help you—dental practice owners and office managers—**improve your retention marketing operation.**

While it may have been easy to consider more sophisticated marketing as nice-to-have in the days before COVID-19, the realities of operating a successful dental practice in the pandemic era have pushed good marketing squarely into need-to-have territory.

So much has changed since this time last year.

Last spring's shutdown period completely disrupted the traditional recall rhythm. Getting patients back into the office is harder than it was before.

Patients who missed the chance to be pre-appointed when their shutdown-period appointments were cancelled are proving elusive. COVID-cautious patients—seniors

and parents of young children in particular—remain skittish about venturing outside of increasingly smaller circles.

Your whole scheduling process has been upended, and may not right itself for some time, so you'll need to increase your marketing to grow production from your existing customer base.

Fortunately, you can count on RevenueWell to show you what to do. In the next few pages, we'll walk you through everything you need to do in order to upgrade your marketing operation. The steps are easy, and you're more than capable of doing them.

We believe in you.





# Organize Your Patient Roster into Segments



## The marketing term for breaking down a big audience (for example, all of your patients) into smaller, more personalized buckets, is “segmenting.”

You can organize patient segments in a variety of ways. You can start with basic demographic details like age, gender, location, and family situation; expand into behavioral details like spending habits (for example, past purchaser of an elective procedure), treatment plan acceptance, and appointment frequency (including has an appointment in the next 30, 60, or 90 days); and even fine-tune down

to different billing codes (which can be helpful for planning hyper-targeted pre-op and post-op communication).

Segmenting your audience is worth doing because it allows you to communicate in a way that feels more relevant and personal to your patients (and that makes your outreach more effective).



### Create a Segment for Shutdown-Period Cancellations

Identify every patient whose hygiene appointment got cancelled during the COVID-19 shutdown period last spring (and add in patients who may have missed an appointment since the pandemic hit while you're at it) so you can target them with customized campaigns that address their specific needs and concerns.

# Plan to Tell Multiple Different Stories



Just as you should break down your patient roster into different segments, you'll also want to **outline all the different stories about your practice that you want to tell.**

**These are your marketing messages.**

There are dozens of things you could share with a patient at any given moment. For example, you might want to share your new COVID-19 procedures for keeping patients and staff as safe as can be or explain why it's important to see the dentist every six months or crow about the new convenient location you've acquired.

The story possibilities go on and on. They can include things everyone should know about (for example, "Here's a list of all the insurance types we accept."), things

that would interest only a certain portion of your patients (for example, "Your little ones might notice that we had to remove all the toys and magazines from our waiting room."), or super-specific stories that would be relevant to only one or two people in any given moment (for example, "Here are the post-op instructions for your tooth extraction.").

Just make sure your messages map directly to the value your practice provides, and then be sure to incorporate these stories into all your patient outreach.



**Tell the Safety Story  
as Much as You Can!**

Reminding patients of the measures you're taking to keep them and your staff safe is an important, timely message that can provide the assurance some may need to book an appointment.



# Don't Put All Your Communication Eggs into One Basket



## When it comes to dental practice marketing, repetition and redundancy is the name of the game.

You never want to put a message out into the world just one time. Why? Because your intended recipient might not ever get a chance to see it.

If your “I’m going to going to send this one time, one way” message comes via a medium your recipient never checks, it’s as good as having never been sent in the first place. To ensure your message actually gets through, you’ll want to make sure to send it via a variety of different methods or “channels.”

Taking advantage of multiple channels also helps ensure you reach people the way they like to be reached. Everybody has their own communication preferences.

Some people respond best to text messages; others prefer phone calls; still others are only reachable via email—you get the idea.

Professional marketers understand that, when running a campaign, they must account for a wide variety of preferences. Therefore, they don’t rely on a single channel—be it a postcard, email, phone call, text message, social media post, or some other form of communication.

When running recall campaigns, take into account that all your patients are different. Utilize all the methods of communication at your disposal in order to reach people in the way they desire.



### Consider New Pandemic-Era Behaviors

Do you know what [marketing email open rates](#) look like nowadays? It’s not a pretty picture, and that’s because marketers (not just dental practices) are trying to communicate through email much more frequently since the start of the pandemic. You should still send email—it remains an effective tool—but you should also consider other ways to reach your patients online. For instance, if you haven’t tried social media posts before, now could be a good time to start.

# Communicate as Often as You Possibly Can



## Remember when we said **repetition** and **redundancy** is the name of the game?

Well, when it comes to dental practice marketing, repetition and redundancy is the name of the game. It's not enough to tell a patient something once and expect them to act. A person may need to hear a message between six and eight times before she'll start to take action.

If you only send a single postcard, the problem is that many times it'll end up getting tossed out with the junk mail. And if that's the only touch in your campaign, you've lost the chance to get the patient back into the chair.

So, for your campaign, plan on sending a postcard, but also schedule two emails, a couple of phone calls, and if you've received permission, a text message or two.

Don't worry about over-communicating with an unscheduled patient (remember: it'll likely take between six and eight tries to move them to action). However, once the patient has scheduled their appointment, stop sending recall messages (if you don't, that's when over-communication irks people).



### **Keep the Communication** **Coming**

If there's one consistent theme in our lives right now, it's uncertainty. Being in the habit of continual communication with your customers makes it easier to reach them when the unexpected strikes: for example, if rising cases mean reduced schedules or different precautionary measures.

# Create Your Own Occasions



## Unless a patient explicitly tells you so, do not feel like you're over-communicating.

Your goal is for patients to have the best oral health imaginable, and every point of contact you make is with that goal in mind. We've identified some potential occasions for your practice to use in the following pages.



## Pandemic Communication

### Pandemic Precautions

Because some of your more COVID-19 cautious patients—seniors and parents of small children, in particular—may be too nervous to come in for an appointment, you'll want to explain the measures you're taking to keep patients and staff safe.

**Bonus:** Check out RevenueWell's free [Pandemic Precautions Package](#), which contains seven social media messages optimized for your Facebook, Instagram, and Twitter; email text explaining all your COVID-19 patient precautions; and an 8.5 x 11 poster template with content suitable for entryways, waiting rooms, and halls.

### Procedure Changes

Don't be shy about letting patients know what might be different about their next visit to your office. There's been a lot of change in the past few months, so explain what might be new about your patient experience.

**Bonus:** The email text in RevenueWell's free [Pandemic Precautions Package](#) provides you with a ready-to-use, plug-and-play template for walking patients through whatever your practice's new procedures may be.



## Pre-Appointment Communication

### Appointment Reminder

The most obvious pre-visit communication is a reminder. Email, text, send a postcard, make a phone call, and work all angles to remind patients about their appointment. Just be sure to stop sending reminders once you have confirmation.

If you're looking to automate your appointment reminder communication, see how RevenueWell's [appointment reminder and confirmation technology](#) can save you untold amounts of time at the front desk.

### Pre-Op Instructions

Tell people what to do (and what not to do) before their appointment, so they know exactly what to expect when coming in to see you. Should the patient refrain from eating or drinking anything in advance of their visit? Do you prefer that patients not floss ahead of time since it inflames their gums and makes treatment difficult? Use this occasion to let them know.

### COVID-19 Pre-Screening Questionnaire

Explain your new COVID-19 pre-screening procedures and direct patients to submit their forms online ahead of time if you have the capability.

### Intake Form Communication

Do you have electronic forms that enable patients to fill out their information before getting to the practice? Do they need to bring their insurance or identification card?

If you don't already have the ability to use online forms, see how [RevenueWell Forms](#) can help you create a low-touch experience for your patients.



## During the Visit

### At Curbside

Make sure you have a standard procedure and that patients know what to expect before they arrive—for example, that they should call to let you know they've arrived and then wait for a return call to enter the office.

### In Waiting Room

Use your waiting room to educate patients on their treatments. If you have a television in the waiting room, broadcast dental-specific programming to show off your different treatment offerings.

### In the Chair

Follow up with patients while they're in the chair. Touch upon the treatment offerings they saw in the waiting room. By discussing what they saw while waiting, you reiterate the importance of certain oral care routines.

### During Checkout

As patients are checking out, ask about the day's visit and again discuss any further treatment offerings the patient might need. Verbally explain and print out any post-op instructions (if needed). Since you're going to be staying in tight communication with them, make sure all the patient's communication preferences are up to date.

## Post-Visit

### Pre-Appointment Confirmation

Were you able to pre-appoint your patient during the checkout process? Make sure her pre-appointment confirmation email arrives in her inbox before she can reach the parking lot.

### Thank You Notes

Getting in touch with a patient within 24-36 hours after their appointment is crucially important. For one, it shows patients you care about them even after they've settled their bill. It's also the premier time to double down on your marketing communications, and a great time to ask for an [online review](#).

### Post-Op Instructions

Email any post-op instructions to a patient's inbox. In the off chance a patient was a little frazzled toward the end of their visit, this ensures they have proper care instructions.

### Patient Portal Reminder

If you have one, send a reminder about your [patient portal](#). Inform patients that they can find all their past treatments and billing statements here. Not only does this give patients a feeling of control over their account, but it also frees up your team from fielding questioning phone calls.

## Social Occasions

### Holiday Greetings

Holidays are the perfect occasion to reach out to your entire patient portfolio. You can either share a simple greeting (for example, Happy Thanksgiving!) or provide helpful information about whether you'll be open or closed.

### Birthday Wishes

Plan to send your patients a cheerful "happy birthday" message to show that even when they're not thinking of you, you're thinking of them.



## Practice News and Patient Education

### Monthly Newsletter

Email monthly newsletters with topical dental information. Tell patients about new treatment offerings. Show photos of your new CEREC or SIRONA machines, explaining how they make visits easier and more efficient than ever before!

### Financing Options

Elective procedures may be a tougher sell in a soft economy, so if your practice offerings financing options like CareCredit, you should consider sending reminders a few times a year so patients can know about the option.

### No-Show Notices

Have an appointment open up? Send an announcement. A patient might not be due for their cleaning, but maybe the opening is perfect for that whitening they've wanted.

RevenueWell makes it easy to keep track of patients who want to get in [ASAP](#) so you know who to target.

### Incentive Offers

Because budgets are tight, and people are losing dental insurance right and left, you may find a good incentive to be the strongest marketing tool in your toolbox. Consider offering promotions for restorative dentistry, since patients may consider that more of a need than cosmetic treatments.

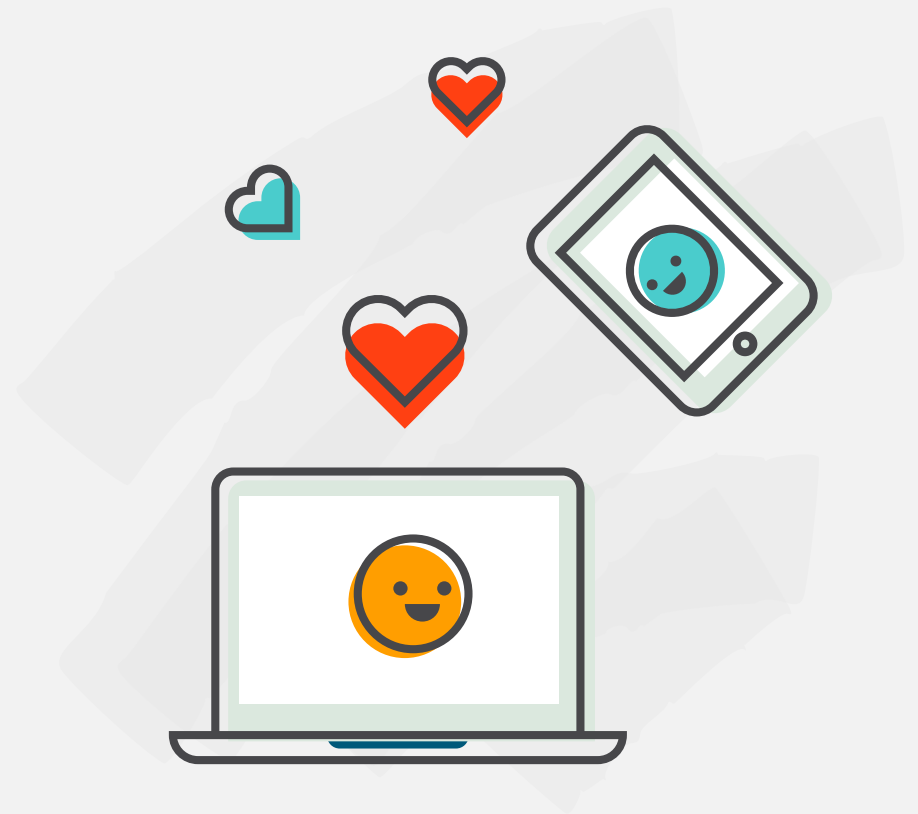
### New Staff Announcements

Reach out to your patients whenever you add a new member to your team. Provide a friendly introduction to the new team member with a picture and a few fun facts about his or her background and favorite foods or sports teams or movies.

### Flexible Spending Account Deadlines

Count on FSA spending deadlines to provide you with an occasion to communicate with patients at least two times per year—once leading up to the end of the calendar year and again leading up to the close of the first quarter, when some FSAs offer grace period extensions.

# Action Plan





**Start segmenting as soon as possible.**

You need to make sure the right message gets to the right person because it's hard to sell dentures to 12-year-olds, and end-of-year insurance notices aren't likely to move the needle for folks without insurance coverage.



**Create a campaign library.**

You'll want to have as many stories as you can tell at the ready so you can keep the flow of communication constant, so start planning content around topics like preventative dentistry, orthodontics, dental appliances, and cosmetic dentistry or choose from the hundreds of pre-built campaigns in RevenueWell's content library.



**Grow your social media presence.**

If you haven't made your presence known on social media, now's the time to start. Facebook and Twitter are powerful channels that give your practice more opportunities to be heard.



**Embrace the paperless approach.**

Patients are required to fill out new forms because of COVID regulations and protocols. Going paperless will help you reduce no-shows, speed-up check-ins, eliminate clutter, and keep everyone safer by reducing the spread of germs.

# Conclusion



## By now you should have **all the tools you need to upgrade your retention marketing program.**

Smart and sophisticated marketing just requires a sincere message and a thoughtful way to deliver it. The strategy is straightforward and simple.

The part of the retention marketing recipe that requires effort and time is execution. Unless you have a large staff to assist with your retention marketing tasks or an all-in-one software platform like RevenueWell that can do the work for you, you may have to take on fewer tasks.

Still, as long as you take a consistent approach and follow the guidelines laid out in this book, great things will happen for your practice!





## Additional Resources

We hope you found the content of this report useful. If you'd like additional resources that can help you grow your practice, manage your team, and connect with patients, please review some of our [articles](#), attend one of our [webinars](#), make use of some of our [tools and templates](#), or steal whatever you find from the eBooks to the right.



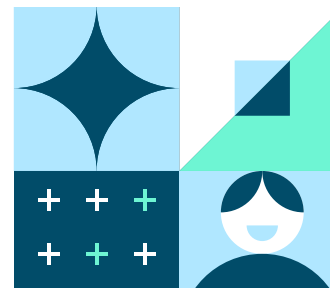
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## About RevenueWell

Founded in 2010, RevenueWell enables dental practices to manage patient engagement, patient relationships, online practice reputation and appointment reminders. The company also offers desktop two-way texting, VoIP phones, electronic patient intake forms, and an enterprise management dashboard that allows group practices and dental service organizations to manage their portfolios. RevenueWell's product suite and integration with the leading practice management software providers help reduce manual labor by automating and facilitating patient contact and patient interactions, which lead to strong ROI for its dental office customers. The company is headquartered in Chicago, Illinois. For more information, please visit [www.revenuewell.com](http://www.revenuewell.com).



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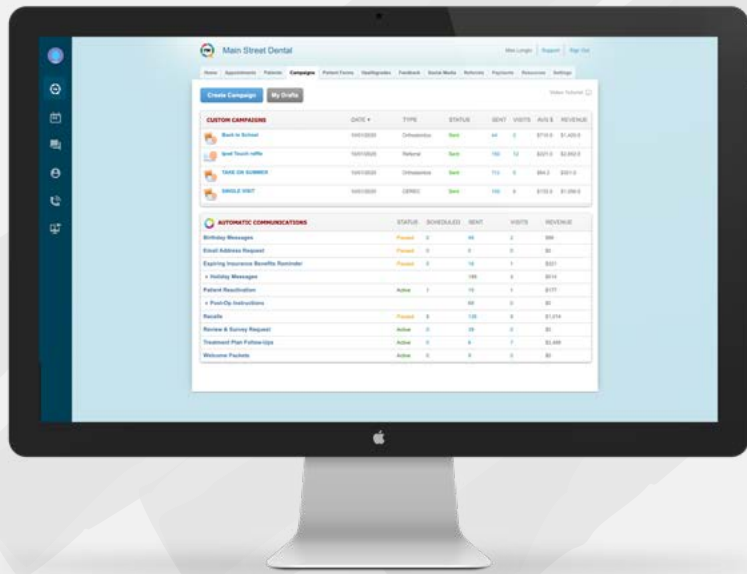
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