

Use the Personal Touch in Developing Referral Relationships

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Developing and sustaining relationships is an art form that will help you create a robust referral network. As with any relationship, the more personal and interested you are in others, the more long lasting that relationship becomes. There's no quick formula and any worthwhile relationship takes time to develop.

So where should you start?

The Hospital

Take the time to introduce yourself to call center personnel and the individuals in the marketing/public relations departments. This effort helps them put a real face on their work and also lets them know you appreciate the work that they do. Make sure they have a good sense of your services. Find out what is typical in their outreach efforts and see how you can augment with outreach of your own. Do they have a speakers' bureau? Do they have ongoing social media endeavors? Can you write a feature article for their newsletter?

Payers

Make sure you've connected with all of your payers and are listed appropriately in their online and print directories. Visit the place where they have their insurance call center personnel; introduce yourself and what you offer. If the payers are too far away from your office, simply getting in touch with them over the phone can do wonders. Making the connection more personal and memorable is always helpful.

Practice Partners or Former Colleague

If you're taking over a practice, make sure there is a hand-off between the former provider and you. Mail letters all existing patients about the practice changes; they can help prevent leakage and provide you with a solid and respected introduction into the community. This communication process also works well if you're joining a practice. Your new colleagues can send a letter to their existing patients about the new provider/new specialty.

The Medical Community

Take the time to arrange face-to-face introductions. Consider who will be most likely to refer to you and get out to meet those individuals on their turf: their offices. Introduce yourself to office personnel, too; in most cases, they will handle the mechanics of the referral and it helps them to really know who you are.

Ask the medical staff leadership to introduce you or call or drop by on your own. To reinforce your presence, send out the announcements first and follow up with a face-to-

face contact. Then, send out a letter to those contacts thanking them for their time and reiterate the services you offer. This is an ideal time to include a Rolodex card with your contact information. In a short period of time, you provide three “touch” points and demonstrate your communication abilities.

Outreach Tasks

Be out in front of people. Help them get to know you by some of the following actions:

- Offer an open house in your new office for referral sources.
- Offer an open house with a health twist for the community—a free screening or healthy checklist.
- Participate in CME lectures.
- Partner with a non-medical provider to offer a service screening.

The Real Basics – Don’t Overlook

Once you start getting referrals from providers, make sure you’re worthy. What does “worthy” mean? This goes beyond provide good care for these patients. You need to make sure you provide easy and convenient access for your referral sources. If they need to talk to you, make it easy for them to do so. Instruct your office staff to be warm, friendly and HELPFUL.

Close the loop once the patient has been seen. If a referring provider sends you a patient, be sure to call them/e-mail them/fax them and tell them what happened with THEIR patient. Make sure they are the first to hear the news. Make them feel like a partner in the care and tending of THEIR patient.

Some physicians also send thank-you notes and build this into their workflow process by having a thank-you card attached to a new patient record as a reminder of jotting a quick note. In our rushed world, the little extras—especially written notes—go a long way.

Not Just for New Physicians

Track where your referrals come from. Keep an eye on this data to help catch issues or see when referrals are dropping off and need a shot in the arm. Just because you’re not a new physician doesn’t mean you shouldn’t get out to see your referral network. Getting out to visit with your referral sources helps them feel more confident in the relationship. You can also use the visit to find out how your services are working for your referrers and to tell them about new procedures/information about your work.



Suzanne Dewey served as the senior administrator in charge of marketing, public relations and development at Tobey Hospital in Massachusetts, where she initiated the first marketing department and physician relations program. She has worked as a special consultant to the Massachusetts Hospital Association, facilitating physician leadership groups. As a consultant with Corporate Health Group since 2002, Suzanne has held a long-term engagement with Beth Israel Deaconess Medical Center working with Network Development on physician relations and service-line development. She launched [Forté Partners](#) in 2007 and continues to focus on business development and planning and marketing.