

7 Habits *of* Referability

Crank Up Referrals and Create New Profits

[STAFF TRAINING EDITION]

www.theparagonprogram.com



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Paragon Management is the nation's leading practice management firm with over 25 years of experience working exclusively with dentists.

Ken Runkle is founder and president of Paragon. He consults with hundreds of practices towards meeting their goals and creating financial independence. He speaks all over the country to organizations and study clubs on the science of profitability. Ken is a contributing author to Dental Economics as well as many online publications. He is America's profitability expert.

Does your practice have a continuous flow of new patient referrals? Do all team members maximize every opportunity to point new patients to your practice? Take 10 Minutes to see how you measure up.

While studying business practices for IBM, Frederick Reichheld discovered 7 Habits of Referability that led to IBM's early success. Ken Runkle translates Reichheld's research into 7 Essential Referral Habits for every growing dental practice. As you review these seven habits, evaluate how well they are represented both in your practice. You might be surprised to learn how many potential new patients you and your team are leaving outside in the cold.



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[Staff Training Edition]

by Ken Runkle – America’s Profitability Expert™

INTRODUCTION TO THE 7 HABITS

Paragon Audio Training Session
“Introduction and Referability Habit #1” (Length 5:32)

Does your practice have a continuous flow of new patient referrals? Do all team members maximize every opportunity to point new patients to your practice? Are you meeting your monthly new patient referral goals?

While studying business practices for IBM, Frederick Reichheld discovered seven habits of referability that led to IBM's early success. As revealed in his book, **The Loyalty Effect: The Hidden Force Behind Growth, Profits, and Lasting Value**, Reichheld's research points to repeatable behaviors which I have found to be directly transferable to every dental practice.

As you review these seven habits, evaluate how well they are represented both in your practice and through your team. Focus intently on your work as the practice leader as well as your entire team's efforts in referring new patients. You might be surprised to learn how many potential new patients you and your team are leaving outside in the cold.



Referability Habit 1

The Habit of Courtesy

Paragon Audio Training Session “Introduction and Referability Habit #1” (Length 5:32)

“Please” is still a magic word along with the phrases “Thank You,” “Yes Sir,” “No Maam,” and “Your Welcome.” A courteous practice is a growing practice because moments of courtesy with your patients become stories shared with their friends. “Dr. Smith is so nice...”

Paragon Practice Discussion Questions:

1. On a scale of 1 to 10, how would your patients rate your staff in terms of showing courtesy?
2. In analyzing every point of contact with your patients (from the phone to treatment to payment), where could your team improve courtesy?
3. What specifically will you do to ensure the Habit of Courtesy is fully implemented and consistently represented in your practice?

New habits will bring new patients and new patients will create new profits.

Go for it!



Referability Habit 2 - The Habit of Being On Time

Paragon Audio Training Session “Referability Habit #2” (Length 1 min 45 sec)

Ten years ago the goal was to get patients from the waiting area to their room by their scheduled appointment time. For today’s patients, personal schedules are tighter and time is more important. “On time” today means patients are driving away from your practice by their expected completion time.

Being on time is more about managing patient’s expectations than ensuring that you meet every scheduled time. One way to manage patient’s expectations is to pad every treatment by at least fifteen minutes. If a typical prophylaxis requires an hour, share with your patients to expect one hour and fifteen minutes for their treatment. “Mrs. Williams, you should expect to be here from nine to ten-fifteen on Tuesday.”

Meeting or exceeding their time expectations will lead them to share their story with others.

Discussion Questions:

1. On a scale of 1 to 10, how would your patients rate your staff in terms of being on time?
2. Are your patients consistently pleased with their time expectations for treatment?
3. What areas of your practice lead to bottlenecks in your practice?
4. Do you have a system in place to measure “wait time” for patients?
5. What specifically will you do to become known as an “On Time Practice” in your community?

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Referability Habit 3 - The Habit of Using Names

Paragon Audio Training Session “Referability Habit #3” (Length 2 min 22 sec)

People love the sound of their own name. Using names creates immediate rapport with patients, shows you care, and lowers trust barriers. Make it a rule that patients are always addressed by their names.

Dental Assistants and Hygienists can greatly help doctors who tend to forget names. Simply implement a practice in which the hygienist or assistant always refers to the patient by name as the doctor enters the room.

In addition to using names, if applicable, your team should address patients using relevant honorifics such as Reverend, Dr., Judge, Professor, etc... In Paragon, we recommend using a 25 to 30 year rule as a guide for when to address patients as “Mr.” or “Mrs.” If the patient is at least 25 to 30 years older than you or other staff members, the patient should always be addressed as “Mr. Smith” or “Mrs. Jones” out of respect.

Discussion Questions:

1. Do team members consistently address patients by name or honorific if applicable?
2. Do team members “remind” other team members of patient’s names as they pass them on for treatment or front office interaction?
3. What specifically will you do to ensure it becomes a habit for all team member to address each patient by name and/or honorific?

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Referability Habit 4 - The Habit of Happiness

Paragon Audio Training Session “Referability Habit #4” (Length 2 min 3 sec)

Come happy – Stay Happy – Go Home Happy. Over two decades of in-office consulting has taught me that happy people schedule more treatment. In fact I usually recommend that unhappy front desk people be immediately replaced. It is critical for growing practices to establish the necessity of happiness and replace team members who do not meet those expectations.

Discussion Questions:

1. On a scale of 1 to 10, how would the patients in your practice score your staff in terms of happiness?
2. Do your patients share with their friends and networks that a visit to your practice brightens their day because it's a happy environment?
3. What actions does the staff take on a daily basis to ensure every team member exudes happiness?
4. What specifically will you do to ensure that happiness becomes a habit in your practice?

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Referability Habit 5 - The Habit of Accepting Compliments

Paragon Audio Training Session “Referability Habit #5” (Length 56 sec)

Although we may think it represents humility to deflect or demur when complimented, it is more like rejecting a gift. A compliment is a gift and should be received with a gracious and heartfelt “Thank You.” People love to feel like their gift is well received.

Discussion Questions:

1. What is each staff member’s typical response to a compliment?
2. Consider giving each staff member a compliment during this discussion and have them practice responding with acceptance and a heartfelt “Thank You.” Remember sincerity and not false humility is the key.
3. What specifically will you as a staff to ensure that accepting and appreciating compliments becomes the norm?

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Referability Habit 6 - The Habit of Asking for a Referral After a Compliment

Paragon Audio Training Session “Referability Habit #6” (Length 25 sec)

In the same way that a compliment is a gift, it is also a perfect opportunity to ask for referrals. “Ms. Jones, thank you very much. I’d also like to offer you a compliment. We count it a great privilege to serve patients like you. If you have any friends like you, we’d love to have them as patients.”

Discussion Questions:

1. Does your team consistently maximize every compliment by creating a referral opportunity?
2. Consider giving each staff member a compliment during this discussion and have them practice responding with acceptance and a heartfelt “Thank You,” **AND THEN** asking for a referral.
3. What specifically will your staff do to ensure that the habit of asking for a referral follows all compliments?

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Referability Habit 7 - The Habit of Always Asking for Referrals

Paragon Audio Training Session “Referability Habit #7” (Length 4 min 27 sec)

To build a well-oiled referral machine, every team member must be trained and empowered to see opportunities and maximize them.

According to the A.D.A., five out of ten people do not currently see a dentist regularly. In addition, two who currently see a dentist are ready to move on to another dentist. In other words, seven out of ten people are always looking for a dentist. Do not leave them outside in the cold, start opening the door.

Discussion Question:

1. Is your entire team creating and maximizing referral opportunities?
2. What specific steps will you take in the next 90 days to ensure that every team member develops the habit of always asking for referrals?

Role Playing Session:

Here are a few quick tips for creating referral situations. You might want each staff member to role play the process:

1. **THE OPENING:** “What do you do?” All team members are often asked in social gatherings what they do for a living. Learning a proper response creates referral opportunities.



2. **THE RESPONSE:** “I work for one of the best dentists in Ohio – she’s phenomenal.”
3. **THE TRANSITION QUESTION:** “Where do you go for your dentistry?”
4. **THE OFFER:** Every team member should be empowered to pull out a business card, flip it over and hand-write an offer of \$100 off a new patient exam. This hand-written offer provides a personal touch to the invitation.

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