Articles & Advice
BUILDING REFERRAL RELATIONSHIPS
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DEFINING RELATIONSHIP DEVELOPMENT

What is the value of a great relationship? What are the basics of a relationship? How do you form one, and even more importantly, how do you keep one going? How do you repair one after you’ve botched something up?

If you have never botched a relationship, or you feel all past failed relationships were “someone else’s fault”, this series of articles is not for you.

For the past 30 years my company and I have trained thousands of people on professional relationship development. The training is based on exact workable principles and techniques with proven success every time.

I personally researched to find a good definition of this term “relationship development”. Please continue to read through to the end of this article and let me know if you agree.

So what does “relationship development” mean? Let’s first break down the basic words themselves:

Relation:
1) A logical or natural association between two or more things; connection.
2) The way in which one person or thing is connected with another.
   Derivation: Relation coming from relate <Latin relatum brought back, related <re- back + latum brought)

Relationship:
1) State or condition that exists between people or groups that deal with one another.

The derivation above shows where the word originated. It implies the idea of repetition or development or a connection that continues. We can conclude that to relate to someone must involve some repeated activity, connection and association seem to play a part in this.

Development:
1) A causing to grow, expand, or improve.
2) Caused change in character through successive periods; evolve.
   Derivation: <French deveopper unwrap.

Summation:

RELATIONSHIP DEVELOPMENT: The action of causing the repetitive connection and evolution toward accomplishing the common purposes of two or more people.

This datum can be applied to friendships, family, dating, marriage, and of course business.
The point I really want to stress is “repetitive.” Example: a new client walks through the door. They take a tour of your business and you hand them an information packet describing your services. He/she says they’re interested and want to think about it and they leave.

Now the wrong thing to do…sit back and wait for them to call. If you truly want to develop the relationship, and it’s your complete intention to develop this person into a new client, you must create the “repetitive connection” to remain fresh in their mind.

Steps to develop this new client:

1. Get the contact information for anyone interested in your services. (Get their phone number, email address, mailing address, etc.)
2. Phone them; then follow that with an email or a personal letter thanking them for their interest in your company, expressing your desire to service their personal needs and thank them for calling/coming in.
3. Continue the follow-up with promotional items, letters, calls, and successes of recent clients. Keep the repetition in at least every other week, and always be polite.
4. Keep your website up-to-date with articles, blogs and free information and steer the prospective client to these in all your promotional actions. This develops trust and hope that your help would be beneficial to them.

I hope this was helpful. This is a first in a series of articles on this subject so please watch for the upcoming articles.

Please feel free to write me anytime. I’d love to hear from you whether it be success, feedback or questions.

Sincerely,
Craig Ferreira, CEO
Survival Strategies Inc.
CREATING LASTING BUSINESS RELATIONSHIPS

With economic hardships, pressures and competition how do you keep your customers coming back for services or continue to generate new ones?

A practical definition of “survival” is: “the act or fact of surviving, especially under adverse or unusual circumstances.”

The way to survive ANY hardship requires building relationships with your customers, staff, community, etc. You have to have such a lasting “friendship” with them that even during hard times of affording your services, they would never consider looking elsewhere as they would be biased by the their affinity for you.

The point here is…What is the lasting impression you make in the minds of your public? What do they remember you by? Still don’t think this is true? I know several people paying top dollar for services to their dentists, doctors, etc. because they enjoy the relationship they have with them and their quality of service. They love walking in the respective business’ lobby and having the receptionist greet them with a smile and know them by first name. They could go somewhere cheaper or simply select any HMO, but the quality, care and friendship are more important to them.

Homework: This month get EVERY employee to work harder to smile, be friendly, ask customers questions about their lives, being interested in them and their families and truly work to build that lasting impression/relationship. Tell your front desk to greet them by name upon arrival, offer them water, coffee, etc.

New equation: Lasting Impression + Relationships= Continued Survival
I bet the application of this one datum will find you surviving a bit better

Sincerely,
Craig Ferreira, CEO
Survival Strategies Inc.
ROUNDING UP REFERRALS

Patient referrals fuel your practice’s success. Without them, clinics sputter to a stop. But getting referrals is no easy task. It involves tremendous extroversion and a willingness to be active in the community. It also requires a commitment to build long-term relationships. It involves selling the practice (public relations) as well as its services and products (marketing).

Physician Referrals

Don’t go to a doctor asking for referrals before you’ve found out the doctor’s philosophy and needs. You don’t want the doctor to lump you with equipment and drug salespeople. If you haven’t done your research, you’ll ultimately get brushed off. You may even get a seat in the waiting room next to several other “salespeople” who are pitching their products.

You can topple the “salesman” perception by building a relationship with the doctor. Certain activities that can position you better as a doctor’s equal include:

- Observing surgeries
- Attending rounds
- Surveying the doctor’s patients, (with his participation), about some area of common interest, such as back pain
- Co-presenting a health care lecture to the public
- Having the doctor do in-services for your staff
- Doing in-services for the doctor’s staff
- Getting the doctor’s advice on a topic of concern
- Developing or reviewing protocols for treatment

These interactions help you draw on your own areas of expertise, but they also provide opportunities to get to know the doctor better. Through your interactions, you’ll discover his viewpoints, concerns and interests.

Once you have a flow of referrals coming from a doctor, don’t abandon your communication. Continue to follow up occasionally to check how things are going, provide education and to learn from the doctor. Having rapport becomes crucial if there’s a problem with a patient.

Don’t lump all doctors together.

Doctors are reluctant to complain to you directly. Communicate regularly and prod a bit to see if you can improve your services. By keeping the lines of communication open, you’re likely to have the doctor open up. Just as you keep a patient file, keep a file on all your referral sources. These files can include the doctor’s need, wants, desired protocols and any special notes. In fact, orient your staff to check the doctor’s referral file whenever a new referral source arrives. Encourage staff to update these files with any new information.
By doing the above you’ll see a marked improvement in your physician referrals, but, there’s other steps to improve your referrals overall.

Cultivating Existing Patients

One way to double your referrals is to tap into an existing resource: Every patient is a potential referral source.

Patients who refer you to other patients have one thing in common: They’re happy with your services. But patient referrals rarely happen unless you make them happen. Even when patients are happy and have an impulse to refer, they also have many things going on in their lives. They aren’t likely to go beyond a mere mention, so you must provide follow-through.

Here’s a simple formula to ask for referrals from patients:

1. Note the patient is “winning” (before discharge or during the discharge interview). Listen to and acknowledge his gains.
2. Let the patient know that you’re really glad you could help him. Tell him that because he is a client of the clinic, you’d be happy to help friends or family who might need care.
3. Some clinics offer a courtesy screening as an “easy” way for people to refer without obligation. In any case, tell the patient what you’re willing to do for his friends or family. Have a business card ready or design promotional material explaining any special offers for referrals.
4. If there is any interest at all, ask the patient who might benefit from having a screening or therapy. Give the patient a minute to think about it and then just listen. When the patient comes up with a name, get some details so you can discuss possible screening and services.

Of course, I can hear you saying, “But, I’m not a salesman. I’m a clinician. I could never do that.” You may have an aversion to selling, but substitute that word “selling” with “helping” in your mind. Your motivation and intention is helping. If you’re genuinely interested in the person in front of you and in his friend, sincerity will speak for itself and you’ll get more referrals than you know what to do with.

To make this procedure routine, you need to put someone in charge of the process. In addition, you should drill this procedure into each of your therapists’ routines so it becomes second nature. We often spend up to five days with clinicians to perfect these referral skills.

If you live in states that don’t have direct access, you may balk about friend and family referrals. I’m not an attorney (and urge you to consult one for further direction), but in most areas, there is nothing to stop you from having a chat and screening patients to see if you can provide further service.

If a patient needs a doctor referral for legal or insurance purposes, you can then refer him back to his doctor. If the patient doesn’t have a primary care doctor, you have an
opportunity to refer out to a deserving physician who would be pleased to have a new patient. Either way, this is a workable relationship development strategy.

Another way to kick-start referrals is to join or even form a national or regional network of other people in your profession. Such networks seek out more clout than going it alone.

If you are joining an existing network, follow these tips:

- Ask for and then survey a cross-section from an uncut list of network members. Ask network members about their experiences and ease of obtaining reimbursement. Also, what are the pros and cons of belonging to the network?
- Carefully examine the contracts that the network already has and those that they are negotiating. Scrutinize the amount you may have to write-off and what kind of patients you’ll be receiving. For example, if membership in the network means you must take a large number of patients at low reimbursement, it probably isn’t worth it.

PR and Marketing

Public relations and marketing also can stir up patient referrals. By promoting your name in the community through health screenings and other opportunities, you can develop name recognition and direct referrals.

Here are some simple and inexpensive PR activities to consider:

Host educational seminars and workshops on topics of interest. Educate the public about your services and prevention by offering seminars on health-related issues, such as back pain, growing old gracefully, keeping children fit, women’s health, aquatic therapy or sports performance enhancement.

To extend your reach, invite local health care professionals to co-present with you. By working with other physicians, you’re exposing yourself to more referral sources.

Don’t forget to put out public service announcements about these activities. Call your local radio station and newspapers and ask them what format they’d like to receive the information.

- Offer to write articles about health care in local newspapers or do “spots” on the radio. You’d be surprised by the need for information on health care.
- Participate in local health fairs and trade shows.
- Create brochures so doctors can give their patients information on common topics, such as back pain or shoulder pain. These brochures shouldn’t be promotional. They should be educational, and save the doctor time explaining common ailments. (Include your name and clinic address on the brochure.)
• Produce newsletters on various health care topics. You can mail these newsletters or put them on your website. You can also e-mail tips or newsletters to patients and physicians.

To achieve the desired public relations effect, you don’t have to go into crass commercialism. Your strategy might include offering newsletters and cards for birthdays and holidays. Regardless of your strategy, find the one that fits your office climate. By promoting your practice and seeking referral sources, you can ensure patients continue to knock on your door. You have valuable services of offer. Let people know about them.

Harvey Schmiedeke, President
Survival Strategies Inc.
**RELATIONSHIP DEVELOPMENT**

**COMMUNICATION SKILLS**

Relationships are usually built upon good communication. Depending on the circumstance, this is done in person, or in writing between two parties, or over the phone because of long distance. But one thing is a constant in all communication… When communication goes awry, so does the relationship to a greater or lesser degree.

The basic to all relationships then, whether personal or professional, is having the ability to use excellent communication skills, and the proper skill at the proper time. Yes, that’s right, there are many communication skills that when learned and practiced can achieve or overcome some incredible feats!

Let’s touch upon some of the most common problems we encounter in our communications with others.

- Not able to be comfortable in front of another. Examples: shy, worried, anxious, etc.
- Becoming upset about the words or ideas another person is speaking of.
- Not certain if the person fully got your point of view. Was it misconstrued? Did you convey it properly?
- Speaking to a compulsive talker who won’t stop for a moment granting you the equal opportunity to speak or answer.
- Your question doesn’t really get answered, but the conversation is then artfully moved to another topic.
- The conversation goes on and on, long past where it should have.
- The person cuts in and you forgot what it was you were trying to get answered.
- The person brings up a topic of a very personal nature.

Any one of these is apt to leave you wondering what is going on, where’s the conversation headed, the problem of how to deal with it, or, is there anything you should do about it?

This area of communication and relationship development is part and parcel in all business! It would well behoove any person running a business or dealing with business relationships, whether it be an owner or employee, to learn effective communication skills to help accomplish their business objectives. And please understand that nothing less applies when dealing in personal relationships!

This is truly the best thing I could ever recommend to you or your company as there is no other area which provides such a guarantee of both success and gratification!

Craig Ferreira, CEO
Survival Strategies, Inc.
REFERRALS – THE WRONG WAY

I’m usually giving information on the correct ways to start and maintain business relationships, but I thought I’d lend myself to the wrong ways of doing them. This can be somewhat comical, but also may help you spot detrimental methods you may be using or have used in the past. It may be time to change your operating basis…

1. You finally get an appointment after several attempts to visit a doctor; you arm yourself, (or rep.), with notepads, pens, mouse pads, coffee mugs, etc. all with your logo imprints nicely on each. Upon the visit you inundate the doctor/his front desk with “everything about me” conversations or “look at all this awesome merchandise I’ve brought in”. Guess what… you’ve just positioned yourself as a pushy salesman. NOT GOOD!

2. During your meeting with the doctor you speak non-stop about your own clinic, how wonderful it is, your patients love you tremendously, and of course your stellar results. The doctor is nodding off, now and then checking his watch, thinking to himself – “Yah, yah, ; when will this be over”? Guess what… you’ve positioned yourself like an Infomercial! AAAAAH!

3. You pop by the doctor’s office without an appointment, slither in and begin talking a mile-a-minute, afraid of being stopped by “the doctor is too busy to see you”. He has no idea who you are and probably no interest to find out; but he most definitely knows you’re consuming his valuable time! You’re on your way to being thrown out very shortly as well as leaving him with a bad impression of you imprinted in his mind.

4. You bump into a referring doctor at a restaurant; unbeknownst to you (of course you failed to ask), he’s out on a romantic anniversary dinner with his wife and on his way in to sit lovingly beside her. You’ve invited yourself to join him, and start talking his ear off…Oooooh; you just lost a referral source. Bam!

I could go on, but here’s what each of the above 4 methods are lacking… INTEREST! Using the methods above you’ve demonstrated that you really don’t care too much about the doctor, his schedule, and interests. Big mistake. HUGE!

Never represent yourself as a salesman; this may be a difficult habit to break, but it’s easier than having the harder challenge of removing a detrimental image of yourself and your clinic from his mind. Instead, get out there having your full intention always directed on finding out the real interests of the doctor in front of you; your complete attention on his ideas, hobbies, what he likes most in treating others, why he decided to be part of this industry, his hopes and dreams for his practice, etc.

Once the doctor feels you are there to listen to him, with genuine interest, to know and understand him and his business, you’ve just started a real friendship and quite possibly a lasting business relationship. This may not happen on the 1st visit, but very probably will by the 3rd or 4th. Keep the momentum going with your genuine interest in him, his ideals, business, etc.. Don’t forget the importance of doing the same with the front desk! They can be a quicker entrance OR exit point, so make your visits a pleasure for them as you’re in their office.

Craig Ferreira, CEO
Survival Strategies Inc.
INTEREST & RELATIONSHIPS

Have you ever experienced being around someone who continues to be “interesting”? They tell you all about their achievements, who they know or have seen lately, where they went and what they’ve been up to. This person is trying hard to engage your attention and curiosity by telling you ALL about themselves and is not really interested in anything you have to say.

Now consider being with a person who is genuinely interested in you. They ask questions about you and have their attention on you, not on themselves. That’s the person you will inevitably find interesting.

If you want to start a relationship with someone you need to put your attention on that person. Let’s say you are meeting someone for the first time. Keep in mind that all the information you may want to know about this person is in their mind, all his/her interests, knowledge, problems, upsets, beliefs, opinions, solutions and ideas. Everything and anything you might want to know about this person in order to know if you would like to associate further with him/her, is sitting right there for the asking.

You may believe it best to let this person know all about yourself in the initial meeting so they would want to meet with you again. You may think to tell them all about yourself or your ideas, your opinions, your knowledge, etc. in hopes that they will find you interesting enough to want to associate with you again. So you basically run off at the mouth and are as “interesting” as you can be.

In most cases he/she is sitting there feeling trapped in a barrage of communication from you, and wondering how he’s going to extricate himself politely.

Your job in starting a relationship is to draw out data from the other person enough that you really begin to understand what they’re about. Your attention must be on the other person, their ideas and show interest in them. Do that well enough and that person will eventually tell you what you’ll need to know and do to begin a professional relationship.

If you feel a nervous wreck at even contemplating leading the conversation with questions to another person, sit down and make a list of words you can use to start, i.e. what, where, when, how, who, etc., these are all words to “find out” about another.

Now as a word of caution, don’t overuse the “WHY” question. In many cases, WHY may be confrontational, as it may put the person on the defensive. When starting out, you only want to collect data about this person, not have him/her defending their actions to you.

You can also try listing several possible areas of interest to ask about, work out a few of them on paper beforehand. You should practice ahead of time and not be held to notes during your meeting.

Relax and have fun…you may just make a new friend or business associate!

Craig Ferreira, CEO
Survival Strategies Inc.
REFERRALS & WORD-OF-MOUTH

No matter the industry, it’s imperative to deliver stellar products to your customer base so they’ll in turn promote your services. This line can assist in generating upwards of 1/3 your monthly income! Got your attention?

Word of Mouth is quite prevalent and most notable with the facilities of Facebook, Twitter, LinkedIn, Yelp, etc. where people are brutally honest in expressing their opinions. Opinions are voiced on everyday matters so you’ve got to ensure what’s being said about your business is positive. In this way you can reach new people as fast as weeds grow!

How would one implement such a referral machine to generate new business?

1) **Most important: MAKE HAPPY CUSTOMERS!** There’s rarely a company anywhere doing this 100% of the time, but you should strive and shoot for it 100% of the time! Never lower your aim! Work to develop the best customer service skills ever and on a regular basis, and handle any complaint instantly.

2) Create social networks for your company and post some useful tidbits. Promote to your customers / clients to “friend/follow you” and ask each to refer your office and services to their “friends”. This is something you should update as often as possible as customers like fresh information! I would suggest no less than once per week.

3) Formulate a referral game plan:
   - Promote games for your customers, (such as a discount off services), for referring another that newly signs up.
   - Print invitations / referral cards now and then and ask your customers to pass these on to friends or family for a free service, free consultation, etc.
   - If you have the means, take it further by creating a Landing Page – example: www.yourwebsite.com/referafriend, where customers may enter their information along with their friend or family member’s info, naming their referral efforts.
   - Promote your referral program/game with a postcard and the simple ways to refer their friends and family.

4) Post in your office, promote in your referral game plan, or in a monthly newsletter your “Customer of the Month” for sending referrals. Choose one that recently referred a new customer, or one that produced the most referrals that month and promote their “prize” for having won the game!

5) Ask your clients from time to time on the quality of service received; also, ask if there was anything that could use improvement. Your customers and what they think is important, for without them you’d have no business! You’ll also build their respect with every effort you make to improve your service.
One thing to keep in mind…if you promote something, you MUST follow through! So track which customers refer people, who they’ve referred that signed up for service, what prize is due them, and the date you deliver it. The worst thing to do is to not keep your word.

Be a bit creative in promoting a customer referral program and I’m sure you’ll soon see new growth in your customer base.

Craig Ferreira, CEO Survival Strategies, Inc.