The Art of Conversion to Premium Services

Joan Wahlman, Marketing Director
Pat Kane, RN, Director of Nursing
Mann Eye Institute and Laser Center
Houston & Austin Texas

Financial Interest

Joan Wahlman is President of JD Healthcare Consultants/Member Care Credit Board
Pat Kane, RN has no financial interest

A PASSION FOR EXCELLENCE

- SERVING OUR CUSTOMERS IS OUR #1 FOCUS
  - 9 CLINICS
  - 5 LASIK CENTERS
  - 3 ASC’S
  - 150 PLUS EMPLOYEES

- 96% PATIENT SATISFACTION RATE!
- 26 % Average Growth Year over Year
“WE’RE GLAD YOU’RE HERE!!”

There are 16,900+ ophthalmologists & 36,000+ optometrists in the US.

Your patients know they have many choices for care.

Why are some practices more successful than others?

PROFESSIONALISM, ATTITUDE & ENTHUSIASM

The quest to achieve memorable customer experience begins with ourselves.

SETTING A STANDARD OF CARE

DEFINE IN WRITING TO SET EXPECTATIONS!

✓ MISSION STATEMENT
✓ CORE VALUES
✓ CULTURE
✓ DELIVERY

There is only one boss. The customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else.

Sam Walton

MISSION

SETTING OUR STANDARD OF CARE

↑ Revenue

Patients = Referrals

Give Great Patient Care

Invest In Employees
THE PATIENT EXPERIENCE

PATIENT SATISFACTION IS A KEY BUSINESS STRATEGY

✓ “The Patient Experience” Equals the Foundation for Sustaining Revenue & Fostering Growth

✓ Doctors & Managers Must Serve as Role Models

✓ All Areas of Your Business Must Participate

Patient Satisfaction Survey:
“As always, exceptional service and outstanding care. The most valuable service received is being confident in the diagnosis and care of your vision over many years as a patient here.”

PATIENT SATISFACTION

PATIENT CENTRIC CARE

› There is a Proven Connection Between:
✓ Patient Satisfaction & Increased Revenue
✓ Better Patient Compliance
✓ Better Outcomes
✓ Quality Standards to Meet Pay-For-Performance
✓ Strong Referral Base

• When the treatment provided is coupled with treating the patient with warmth & respect, the result in growth is significant.

DEFINE YOUR PREMIUM SERVICES$ 

✓ LASER VISION CORRECTION
  ➢ LASIK
  ➢ PRK
✓ CATARACT
  ➢ ACTIVELIFE LENSES
  ➢ ASTIGMATISM CORRECTION W/LASER
  ➢ REFRACTIVE LENS EXCHANGE
✓ SPECIALTY TREATMENTS
  ➢ LIPIVIEW & LIPIFLOW
  ➢ CROSSLINKING
  ➢ COSMETIC PROCEDURES/TREATMENTS
✓ OPTICAL
  ➢ DESIGNER FRAMES
  ➢ HIGH END LENSES
✓ EDUCATE
  ➢ EVERY MEMBER OF THE PRACTICE NEEDS TO UNDERSTAND THE BASICS OF EVERY PREMIUM SERVICE YOU OFFER
DEFINE YOUR PREMIUM SERVICE GOALS $$

- SET MONTHLY GOALS
  - # OF LASIK PROCEDURES
  - Avg. % OF PREMIUM UPGRADES FOR CAT SURGERY
  - SALES VOLUME PER OPTICIAN/OPTICAL

- COMMUNICATE
  - MONTHLY GOAL – 1ST OF THE MONTH
  - STATUS UPDATES
    - Minimum Bi-weekly
    - Most Effective: Weekly

CULTURE: STAFF ENGAGEMENT

... IS A DEFINED BUSINESS STRATEGY
   Every Employee Is A Respected Member of the Team!
   - Engaged, motivated staff are seen as a major asset.
   - Individual & Team Contributions are Recognized & Rewarded!

   MEI GOLD STAR AWARDS!
   Patient Satisfaction Survey:
   "We Love Your Personalized Service!"

HIRE ONLY THE VERY BEST!

EMPLOYEE SELECTION

√ 1ST on PERSONALITY, ATTITUDE & CONCERN for Others!
√ 2nd on SKILL SET

Interview Process
   Telephone► In Person X2► Paid Working Interview

√ ATTITUDE √ COMMUNICATION STYLE √ TEAMWORK
CULTURE
Build a Dynamic Team

The single most important resource you have is your people, and the most valuable time & money spent on your business should be on the development of teamwork & leadership.

Bill Gates

Mann Eye Institute University
Intranet
E Learning
Staff Meetings
Celebrations

PATIENT CENTRIC CULTURE

We Deliver Legendary Service!!
Every Patient...Every Time

Continuous Improvement
Is a Daily Team Event!

“I have never worked with a better team in my entire career. I wake up every day excited to get to work helping our patients see better!”

Mike Mann, M.D.

WHAT DO YOUR PATIENTS REALLY WANT?

RESPECT
• To Be ACKNOWLEDGED
• To KNOW That Their CONCERNS Are HEARD
• To KNOW You VALUE Their TIME

SOLUTIONS
• CONVENIENCE – Access To KNOWLEDGE & WISDOM
• PERSONALIZATION Of Their TREATMENT
• A Streamlined Process That RESPECTS Their NEEDS

VALUE & TRUST
• To KNOW They Have Come To the RIGHT Place: “You Are In Good Hands”

Patient Satisfaction Survey:
Wonderful. Friendly. Felt like family. Doctor, tech, all the staff just great people!
Levels of Engagement
Personality Styles

- OWNERS! We Are Thoughtful & Genuine
  - We Know Your Name!
  - We’re Happy to See You!
  - We Remember Your…Kids, Vacation Plans, Where You Work, What Is Important To You!!
  - We Are Problem Solvers!

- RENTERS
  - I Do My Job…And You Want Me To Enjoy It Too?!!

- SQUATTERS…Quit but haven’t left yet
  - My Paycheck Is What I Live For…

- ACTORS
  - My Boss Told Me I Had To Smile….

The Art of CONVERSION
The 1st CONTACT…Every Contact

✓ IMPRESS with WARMTH & EFFICIENCY
  - Telephone Consultant (Call Center)
  - Online Appointment Scheduling
  - Online Forms/Patient Portal
  - Website Education
  - Insurance Verification
  - Appointment Reminder
  - Facility Information

Patient Satisfaction Survey:
“I strongly recommend the customer service phone line even though it’s a “1-800…” there has never been a long wait to talk to someone knowledgeable.”

The Art of CONVERSION
WELCOMING YOUR PATIENT

- ACKNOWLEDGE by Name & genuine Greeting
- LOOK Directly at the Patient
- LISTEN for Needs…NEVER Interrupt!
- COMMUNICATE to Doctor/Technician as Needed

Patient Satisfaction Survey:
“X greets me with such a welcoming smile every time I come in, and she always goes above and beyond to make sure that my needs are taken care of before I leave. Her customer service skills are excellent and I sincerely appreciate them.”
The Art of CONVERSION
THE TECHNICIAN

COMMUNICATION
✓ A Warm Introduction
✓ A Simple Review of Testing
✓ The Next Steps in the Visit

EDUCATION
✓ Surgical options for LASIK candidates
✓ Surgical options for Cataract candidates
✓ Optical Options

Patient Satisfaction Survey:
"My technician was exquisite. Her mannerism was particularly special. I don't like people touching my eyes. She not only made it comfortable, but pleasurable."

The Art of CONVERSION
THE DOCTOR

COMMUNICATION
✓ A Warm Introduction
✓ Acknowledgement of Reason for Visit
✓ Recommendation & Next Step
✓ Demonstrate Confidence in Outcome
✓ Take A Moment to Answer Questions/Concerns

The “IMPORTANT” CLOSE
✓ A Warm Touch
✓ A Kind Word

Patient Satisfaction Survey:
"Dr. X did a fantastic job of looking over my results, explaining what the results mean, and answering all my questions. I'm still a little upset that he could not guarantee that I will be able to see through walls."

THE Art of Conversion
THE COUNSELOR

› Cheerleader
› Patient Advocate
› Rapport Builder
› Storyteller
› Educator
› Scheduler
› Hand Holder
› Most Importantly...CHAMPION!!...of the VALUE You Bring To Patients!

Patient Satisfaction Survey:
"My counselor was excellent! She is warm, caring, and tries to make everything work for you appointment-wise, money-wise."
The Art Of Conversion
Visual Education Tools

- Patient Education Videos – IPAD System
  - Review Procedures – WHY?
  - Better Understanding Calms Apprehension
  - Validates Professionalism of Your Counselor
  - Visually Demonstrates Differences in Visual Outcomes
  - Ensures Patient Understands Risks Factors

- Patient Folder
  - Technology Checklist/Appointment Listing/What to Expect

- IOL Model/Eye Model

- Payment Options

INFLUENTIAL COMMUNICATION

- Dr. X “Recommended” X Procedure

- That’s Really Exciting...Our Patients Love their Results with X

- Not Everyone is a Candidate, so that’s Great News for You Because...

- Dr. X Believes X Technology Gives Our Patients their Very Best Vision...I’m So Glad You’re A Candidate!

INFLUENTIAL COMMUNICATIONS

- EMAIL a “Thank You” Note for Coming in Today with a Positive Comment About the Visit

- Put “FUN FACTS” in the EMR Alert Box to Connect to Your Patient On Their Next Visit

- Electronically SEND Every Patient a “Happy Birthday” Wish

- EMAIL a Patient Satisfaction Survey with Alerts after Surgery and Long appointments
  - ALERTS go to managers at each location to address any problems
INFLUENTIAL ACTIONS

- COMFORTABLE CLOSE, EXPRESS GRATITUDE
  - I'm So Excited For You! It Was a Pleasure Meeting You! I'll See You Next Week!
- EMAIL
  - Thank You For Coming In Today!
  - Questions? I'm here to help!
- TELEPHONE CALL
  - We Look Forward to Helping You See Better
  - Detail Review
- INSURANCE VERIFICATION
  - Advance Communication of Cost
  - Patient Satisfaction Survey:
    "MEI interaction with my insurance company on my behalf was HUGE! The staff there made that part of this whole process appear seamless."

The Art of CONVERSION
Maintaining Enthusiasm

- RED FLAG – REPETITION!
  - Recognize Uniqueness of Every Patient
  - Interact with Patient with Doctor in the Lane

- HOW CAN MANAGERS HELP?
  - Acknowledge. Encourage.
  - High Five For A Job Well Done!
  - Be Known As A “Go To” Person

The Art of Conversion
Day of Surgery

- HIGH TOUCH
  - Patients are NERVOUS
  - ACKNOWLEDGE & REASSURE With Warmth
    "We have a great team and they are going to take good care of you!"
- EFFICIENCY is Important
  - Scheduling allows patient time for paperwork/payment
  - Family Member is Offered Refreshments.
- SURGERY
  - Team Member GREETS Family & ESCORTS Patient to Pre-op Area
The Art of CONVERSION
Surgical Touches

- GREET & ESCORT patient from Pre-op to OR
- REASSURE that pt will be taken good care of you.
- EXPLAIN every step of surgery prep
- ESCORT patient to OR
- SURGEON greets pt by name and reassures by saying a short prayer before surgery.

The Art of CONVERSION
Surgical Touches

- FAMILY Invited to Recovery Area
- RECOVERY R.N.
  - Reviews Instructions & What To Expect
- SURGEON Reassures Patient & Family
  - Procedure Went Well
  - Asks if Patient Would Like A Picture With Surgeon

INFLUENTIAL ACTIONS

- SURGEON Phone Call – WOW FACTOR
  - Before & After Surgery
- SURGEON Cell Phone Number
  - Pointed Out When Reviewing Drop Instructions
- 1–800–NUMBER for 24 Hour Doctor Coverage
  - "We Are Always Here For You..."
- DIRECTOR OF NURSING Cell Phone Number
  - Given to each patient right after surgery

Patient Satisfaction Survey:
Excellent experience! I was terrified even considering eye surgery, but every member of the staff put me at ease.
Patient Complaints Are Our SPECIALTY – The 3 R’s!!

LISTEN  LISTEN LISTEN

» REPEAT... What I’m hearing you say....What I understand is...
» REASSURE...I’m happy to help!
» RESPOND...How does that sound to you?

"Let me get with the doctor and I call you back by (insert time frame)".
"Let me get with my manager to see what we can do to help you."
"Let me make that change for you.."

We Make Our Patient Feel Special!

PEARLS

• Greet them by name and introduce yourself including a welcome to Mann Eye

“Let new patients know how happy we are that you have selected our Practice”

• Maintain eye contact when speaking especially throughout the surgical procedure.

“Touch is a powerful tool if the patient is comfortable with hand shake to a pat on the hand or arm

6 Service Values to Live By

1. BUILD Strong Relationships.
2. Be an ADVOCATE for your patient.
4. Ensure every staff member understands their ROLE in customer service.
5. Look for opportunities to IMPROVE every day!
6. OWN, RESPOND and RESOLVE patient issues...from initial contact to resolution.
The Art of CONVERSION

Patient Satisfaction Survey:

The Doctor and staff (all inclusive) are a complete modern service anomaly! Every time I visit I am pleasantly surprised at the unbelievable service and caring attitude exhibited by EVERYONE!

Other businesses could take a lesson from the Mann Eye Institute. I actually look forward to going to my eye exams. I wish everyone I paid for service was like you!


Thank You!!