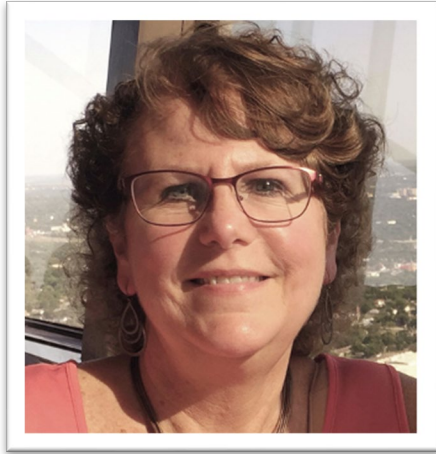


# Practice Strategies for Success in 2022

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FREE LIVE WEBINAR

# Presenters



**Carolyn Baruch**  
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AB Marketing Co.

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913-428-9822

## You will learn how to:

- Improve patient forms
- Dominate Google & avoid negative reviews
- Utilize low-cost & high-value marketing strategies

# Do you want to keep your patients living in the past?



Will they stick around when they can't find your online forms?

Not likely.



Will they stick around when they can't find your online forms?

Not anymore...



# There are many reasons why a practice won't consider using submittable forms:

"We need to have a legal signature on them"



## There are also many reasons why a practice should:

“We need to have a legal signature on them”

Easy-to-use, legal electronic signatures





# There are many reasons why a practice won't consider using submittable forms:

"How will our patients get us the documents we need?"



# There are also many reasons why a practice should:

“How will our patients get us the documents we need?”

## Patient-uploadable document feature

Please attach a scan or photo of the front of your insurance card

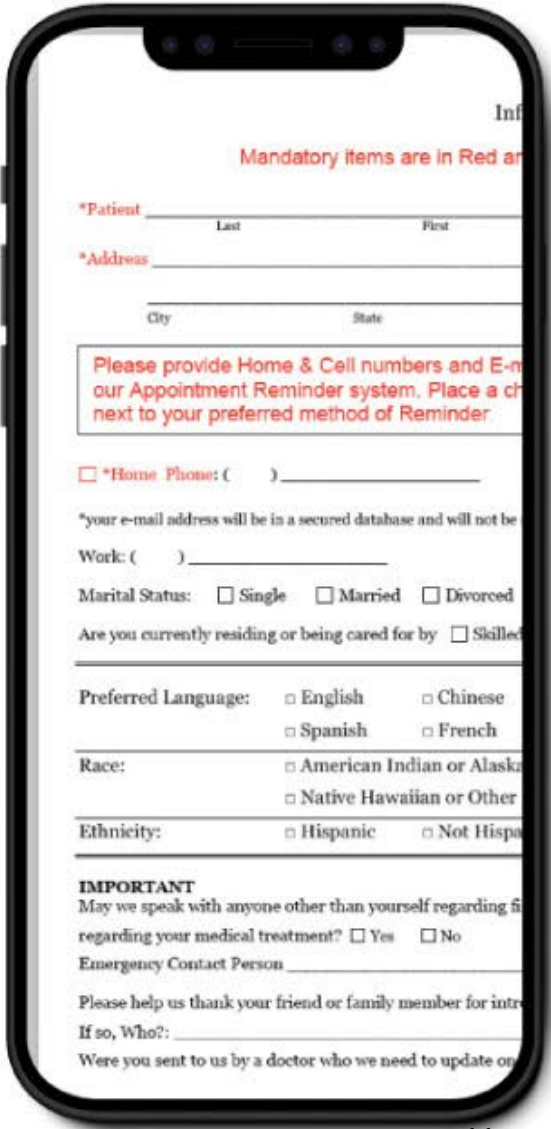
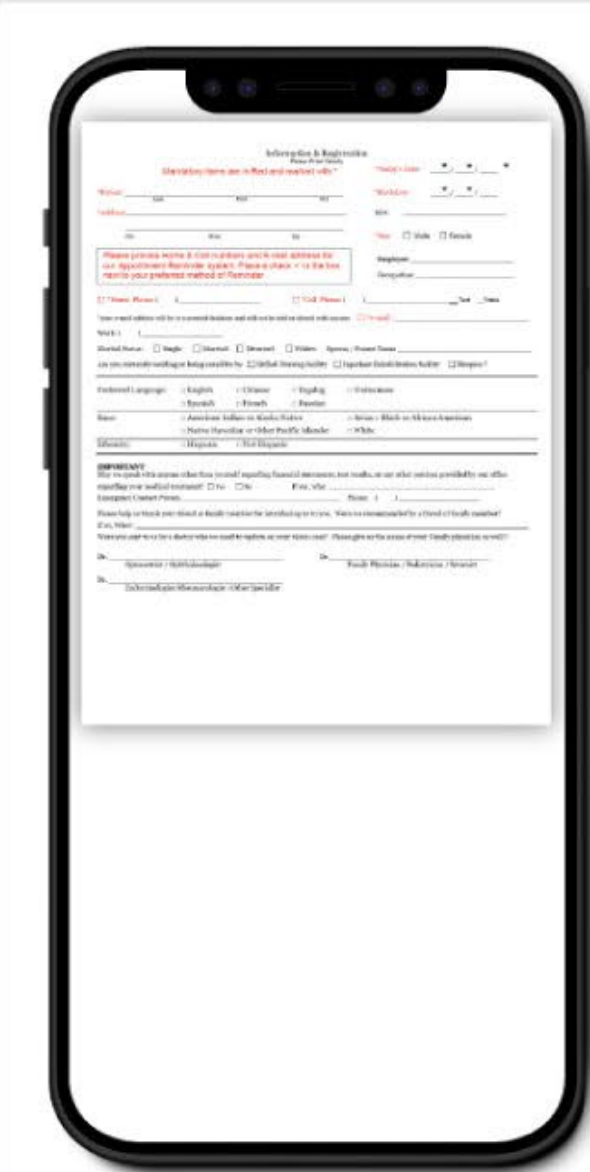
Browse... No file selected.

Name	GRP	XXXXXXXX	
<b>ELIZABETH SAMPLENAME</b>			
ID #			
<b>000000000000</b>			
Svc Type	XXX	Care Type	XXX
RxBIN	XXXXXX	Office Copay	\$
RxPCN	XXX	ER Copay	\$
<b>SYMBOLS PRINT HERE</b>			

of Minnesota, a nonprofit independent licensee of the Blue Cross and Blue Shield Association, is serving only as the claims administrator.

# There are many reasons why a practice won't consider using submittable forms:

"Patients can't complete them on their smartphones"



# There are also many reasons why a practice should:

“Patients can't complete them on their smartphones”

**Fully functional and legible on any size device**

8:58

**Northland**  
FAMILY CARE  
Patient Registration Form

**Patient Information**

Patient Name

Date of Birth  Social Security No.

Address

City  State  Zip

Gender  
 Male  
 Female

Marital Status  
 Single  
 Married  
 Divorced  
 Separated  
 Widowed

Home Phone  Cell

# There are many reasons why a practice won't consider using submittable forms:

“They won't match the forms we've been using”

**AUTHORIZATION FOR RELEASE OF MEDICAL RECORDS**

Patient Name: \_\_\_\_\_ Previous Name (if different): \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Medical Records # (if known): \_\_\_\_\_  
Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<u>Records requested</u>	<u>Exam(s) Needed</u>	<u>Date of Exam</u>
<input type="radio"/> Reports	_____	_____
<input type="radio"/> Images	_____	_____
<input type="radio"/> Billing	_____	_____
<input type="radio"/> All	<input type="radio"/> All	

Notes: \_\_\_\_\_

I hereby authorize to release the requested medical records to the following facility/physician:  
\_\_\_\_\_  
\_\_\_\_\_

I hereby authorize you to release the requested medical records.

**Patient or legally authorized representative Signature:** \_\_\_\_\_  
**Relationship to patient:** \_\_\_\_\_

# There are also many reasons why a practice should:

“They won't match the forms we've been using”

Instant PDF submittals,  
formatted to match your  
forms

Authorization for Release of Medical Records

Patient Name <input type="text"/>	Previous Name (if different) <input type="text"/>	
Date of Birth <input type="text"/>	Medical Records No. (if known) <input type="text"/>	
Address <input type="text"/>	Phone No. <input type="text"/>	
City <input type="text"/>	State <input type="text"/>	Zip <input type="text"/>

Records Requested    Exams (or all exams needed)  Yes  No

<input type="checkbox"/> Reports	Exam(s) Needed <input type="text"/>	Exam Date <input type="text"/>
<input type="checkbox"/> Images	Exam(s) Needed <input type="text"/>	Exam Date <input type="text"/>
<input type="checkbox"/> Billing	Exam(s) Needed <input type="text"/>	Exam Date <input type="text"/>

Notes

I hereby authorize to release the requested medical records to the following facility/physician:

Name

Address     City     State     Zip

I hereby authorize you to release the requested medical records

**Patient or legally authorized representative Signature** (required) – Draw your signature below using a tablet, mouse or smartphone. By clicking the Submit button I understand and agree that this is a legal representation of my signature.

Relationship to Patient

\_\_\_\_\_

signature

# There are many reasons why a practice won't consider using submittable forms:

"I don't have time to learn how to 'build my own form'"



# There are also many reasons why a practice should:

"I don't have time to learn how to 'build my own form'"

**Custom form design can take all that off your back**





# There are many reasons why a practice won't consider using submittable forms:

"Our forms contain our patients' protected health information"



# There are also many reasons why a practice should:

"Our forms contain our patients' protected health information"

**Fully secure servers and end-to-end encryption available**



# There are many reasons why a practice won't consider using submittable forms:

"We just use our EHR forms (but we don't like them)"

**Patient Information Form**

Branch: \_\_\_\_\_ Date: \_\_\_\_\_ No: \_\_\_\_\_

**Applying For A** (Check any that apply)

Learner Permit  ID Card  Renewal  Replacement

**Your Personal**

Full Last Name \_\_\_\_\_

Full First Name \_\_\_\_\_

Date of birth: Day: 01 Month: January Year: 2018 Gender: Male

Nationality \_\_\_\_\_

**Identification Information**

Driver license?  Yes  No

Learner permit?  Yes  No

Non-driver ID Card?  Yes  No

PHOTO HERE

There are lots of places to explore. Places could be urban or suburban. Some people love to be with nature to free their minds and release their soul, but some like to be in the city. You will get lots of benefits such as exploring new culture, meet new people while learning to be active, gain new experiences through things, explore

**Driver license, Lerner Permit, or Non-Driver ID card number**

\_\_\_\_\_ enter the identification number it appears on the license, learner permit or non-driver ID card.

Date of Expiration: \_\_\_\_\_

Type of License: \_\_\_\_\_

Out-of-State License ID No: \_\_\_\_\_

# There are also many reasons why a practice should:

“We just use our EHR forms (but we don't like them)”

**Custom forms ask all the questions you prefer – and none of the ones you don't**

Home Phone	Cell	Work		
<input type="text" value="xxx-xxx-xxxx"/>	<input type="text" value="xxx-xxx-xxxx"/>	<input type="text" value="xxx-xxx-xxxx"/>		
Email				
<input type="text"/>				
Employer Name	Employer Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Primary Care Physician				
<input type="text"/>				
Referred by				
<input type="text"/>				
Communication preference - please check at least one				
<input type="checkbox"/> Home Phone				
<input type="checkbox"/> Cell Phone				
<input type="checkbox"/> Email				
Medical information may be given to				
<input type="checkbox"/> Mother				
<input type="checkbox"/> Father				
<input type="checkbox"/> Other				

# There are many reasons why a practice won't consider using submittable forms:

"They're probably too expensive"



# There are also many reasons why a practice should:

"They're probably too expensive"

**How much time can your staff save by not dealing with paper forms?**



# There are many reasons why a practice won't consider using submittable forms:

"Our patients won't want to fill out online forms"



# There are also many reasons why a practice should:

“Our patients won't want to fill out online forms”

**Wait until they see how much easier it will be!**

**Conditional logic and auto-filled fields make it so much faster.**





# Your practice can leave the past behind...

Patient's Employer Abc Inc.  
Home Phone ( 913 ) 555-1212 Cell Phone ( )  
Permanent Mailing Address 1234 N Main St.

## MEDICAL INSURANCE:

Primary Company Blue Cross Blue Shield  
Insured (Subscriber) John R. Smith  
Insured's Relationship to Patient Self  
Insured's Social Security # 123-45-6789  
Insured's Date of Birth Jan 1, 1998  
Certificate or ID # 987654  
Group or Policy # 321  
Effective Date (Date coverage began) Aug 1, 2015

## ASSIGNMENT OF INSURANCE BENEFITS

I hereby authorize Independence Women's Clinic, Inc. to file insurance processing for financial benefits. I understand insurance benefits are my responsibility. Co-pays and co-insurances are due at the time forwarded to an outside collection agency, which may result in a delinquent account. I also understand a fee will be charged for insufficient payment.

11:07 AM

### MEDICAL INSURANCE

Do you have healthcare insurance?  
 Yes  
 No

**Primary Company**

Insured (subscriber)  Insured's relationship to patient

Insured's Social Security No.  Insured's date of birth

Certificate or ID number  Group or policy number

Effective date (date coverage began)

Do you have secondary insurance?  
 Yes  
 No

Upload picture of front and back of Insurance Card here  
 No files selected.



Satisfied Patient **helps doctors improve and control their online reputation** to get you more **new patients** and **retain existing patients.**

## You will learn how to:

Dominate Google & avoid negative reviews

- How online reviews impact you and your referrals
- How patients are searching online
- How Google search works
- The new referral process

# Online Reviews Directly Impact You & Your Referrals

- 91% of patients read online reviews to help make their healthcare decisions
- A single negative review can drive away 22% of patients looking for a practice/provider
- 1-star increase in your ratings can provide a 5-9% increase in revenue, per HBR



Patients



# How Patients Are Searching Online & How Google Search Works

- Google controls a little more than 92% of the search engine market share worldwide
- That includes 72% of the desktop market and 92% of the mobile search engine market
- Google reviews directly impact the visibility of your search engine rankings and patient trust



Google Search

I'm Feeling Lucky

- ✓ Indexed the web & created a library
- ✓ Ranks the results based on relevance & 100's of factors
- ✓ Locations, keywords, links, freshness

# How Google Search Works: Google My Business Listing

Walmart Supercenter  
STERLING ACRES

See photos See outside

Website Directions Save Call

3.9 ★★★★★ 34 Google reviews

Ophthalmologist in Kansas City, Missouri

Located in:  
Address:  
Hours: Open · Closes 5PM ▾  
Phone:  
Check insurance info  
Suggest an edit · Own this business?

Write a review

3.9 ★★★★★ 34 reviews ⓘ

**T** Tracy Wiley  
4 reviews  
★★★★★ a month ago  
Worst experience ever, they make you wait forever, you see a tech, go back to the waiting room and wait before seeing the dr, then they make you come back because they don't do everything all at once. 1st visit lasted 3 hours only to be given 2 more appointments.  
Like

**S** Sandy Gosserand  
2 reviews  
★★★★★ 2 months ago  
Not that great. Dr. rushes in rushes out doesn't hardly explain anything to you. I have been given four different prescriptions and still cannot see after my cataract surgery  
Like

# How Google Search Works: Google My Business Listing



**Kansas City Eye Clinic**

Website Directions Save Call

4.9 ★★★★★ 479 Google reviews

Eye care center in Overland Park, Kansas

**COVID-19 info:** [kceyclinic.com](http://kceyclinic.com)

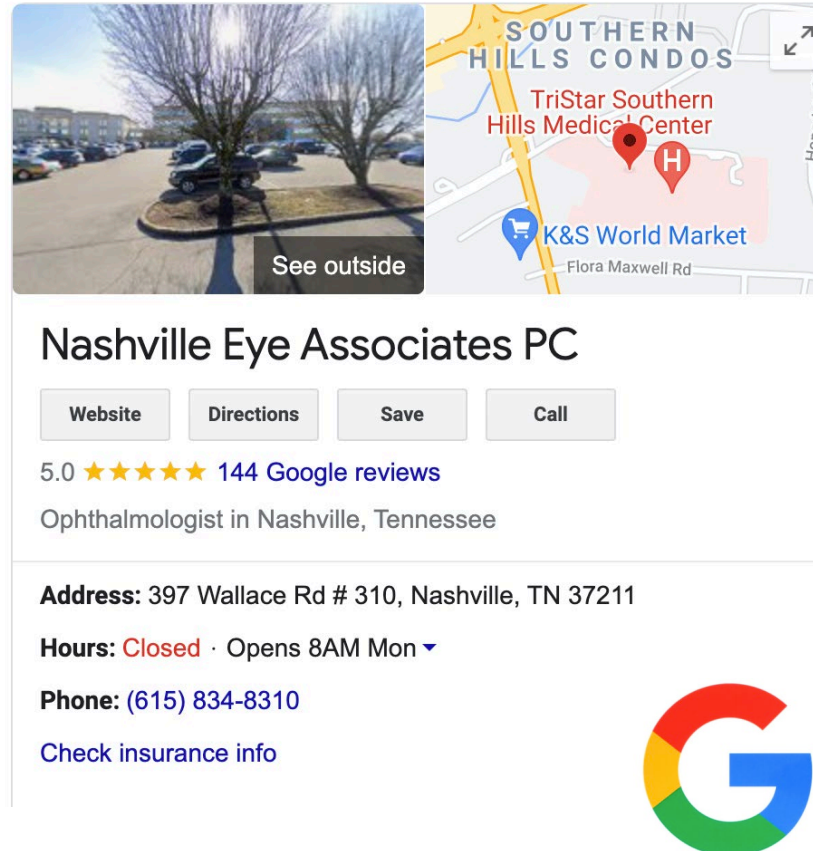
**Located in:** Antioch 75 Shopping Center

**Address:** 7504 Antioch Rd, Overland Park, KS 66204

**Hours:** Closed · Opens 8AM Mon ▾

**Phone:** (913) 341-3100

**Appointments:** [kceyclinic.com](http://kceyclinic.com)



**Nashville Eye Associates PC**

Website Directions Save Call

5.0 ★★★★★ 144 Google reviews


Ophthalmologist in Nashville, Tennessee

**Address:** 397 Wallace Rd # 310, Nashville, TN 37211

**Hours:** Closed · Opens 8AM Mon ▾

**Phone:** (615) 834-8310

[Check insurance info](#)



# Reviews Drive New Patients, Revenue, and more..



**Juanita Z**

Local Guide · 38 reviews · 24 photos

★★★★★ a month ago

I chose Dr Prickett by reviews. I'd like to thank his patients. I had been to so many ophthalmologists and he was the first to give me a diagnosis of a rare eye disease. I will be getting cataract surgery and I know I'll be in good hands.



**Elaine Miller**

1 review

★★★★★ 2 months ago

I am so glad that I started to go to Northwest Eye Physicians and choose Dr. Wood because of the good reviews I read about him. I will highly recommend him to my family and friends.



**Cathy Payne Drewry**  recommends **Retina Center of Texas**. ...

September 5 · 

I first contacted RC on a Sunday because of a possible eye emergency. I picked them from their reviews on the Internet. A doctor answered the phone & gave me instructions & said to call the FW office the next day & they would see me. I saw Dr. Johnathan Warminski & instantly knew I was in the right place. He did a thorough exam, was very patient, explained to me what was going on & how we would proceed going forward.





# Reviews Drive New Patients, Revenue, and more..



**Juanita Z**

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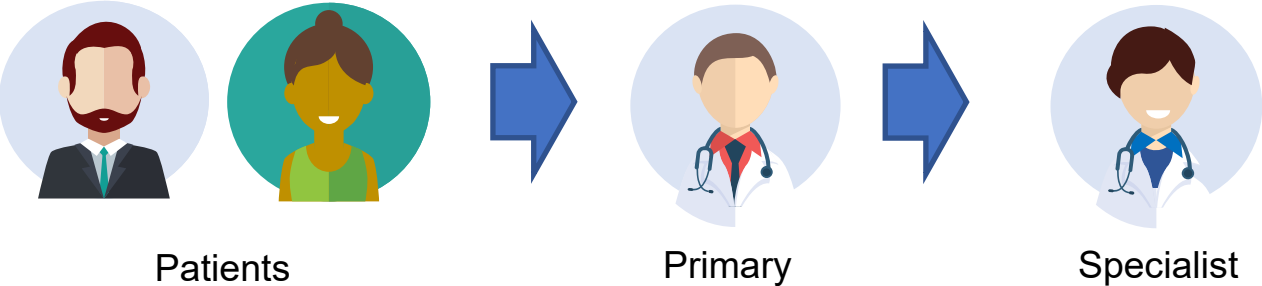
September 5 · 

I first contacted RC on a Sunday because of a possible eye emergency. I picked them from their reviews on the Internet. A doctor answered the phone & gave me instructions & said to call the FW office the next day & they would see me. I saw Dr. Johnathan Warminski & instantly knew I was in the right place. He did a thorough exam, was very patient, explained to me what was going on & how we would proceed going forward.

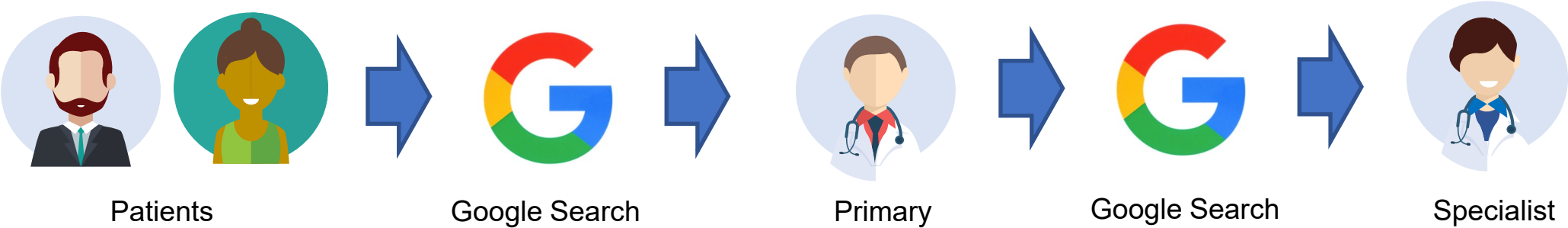


# Patient Referral Process Has Changed

## Old Patient Referral Process



## New Patient Referral Process



## Satisfied Patient Invites You To:

# Stop losing patients on Google

- Avoid negative reviews and grow positive online reviews
- Stop losing patient referrals on Google
- Reduce at-risk revenue and retain existing patients
- Take control of your online reputation for your practice and your doctors

# AB Marketing Co

Accelerating Practices with Sales & Marketing Support

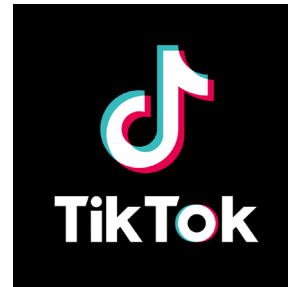
## 3 Low Cost – High Value

- Social Media
- Email Marketing
- Inside Marketing

# Social Media

- Social Media platforms generate awareness, engagement and action with both existing and potential patients
- Helps build credibility in your field of expertise
- Patients are turning to Social Media platforms to seek referrals, advice and education
- Social Media is organic (**FREE!**)





Allows more engagement and interaction with patients

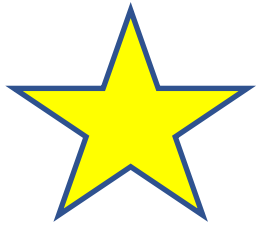


Allows more engagement and interaction with referral partners and other healthcare professionals



Great platform for sharing educational videos for both patients and other healthcare professional

## Tips and Best Practices



- Content: think **SOCIAL!** Use real pics, video and **GO LIVE!**
- Engage: comments, shares matter most
- Follow the 80/20 Rule, include a CTA
- Determine cadence, be consistent!
- Repurpose content
- Preschedule Post to save time
- Have a Strategic 90-day Plan, follow it!





# Email Marketing

- Generates awareness, engagement and action with both existing and potential patients
- Allows for Nurturing and Building Relationships with both patients and referral partners
- Enhances the Patient Experience
- Low cost and effective
- YOU own the list



# Email Marketing – Frequency and Content

- Monthly or Quarterly Newsletter
- Weekly or Bi-weekly touch point
- Promote Services (cash or elective procedures)
- General Reminders
- Practice/Staff updates
- Special Announcements
- Value-Based Education

## Tips and Best Practices



- Gain permission: Opt-in (digital or written)
- Include Unsubscribe Option
- Content: think **Generic!** (marketing)
- Follow the 80/20 Rule, include a CTA
- Determine cadence, be consistent
- Repurpose content
- Make a Strategic 90-day Plan, follow it!

Volume # Issue #  
 Month-Month Year



REPLACE THIS IMAGE WITH YOUR LOGO

# Monthly newsletter

## VITAMINS AND MINERALS FOR A HEALTHY SMILE

Hey there Kids Clubber!!!

Did you know that vitamins and minerals are not just keeping your body healthy? You actually need them for a healthy smile. Certain vitamins and minerals can go a long way in helping you keep your pearly whites at their best! Here's a quick list of the seven important ones:

**THE DENTAL VITAMIN ALPHABET GOES FROM A -Z**

**The A is for Vitamin A**  
 Vitamin A helps with saliva production which is vital as saliva can help to neutralize acids in your mouth.

**THE B is for Vitamin B3**  
 Without an adequate amount of this vitamin you may find yourself seuffering from bad breath and canker sores.





**The C is for Calcium**  
 Calcium is known for strengthening bones, and it's also one to strengthen your teeth.

**The C Also for Vitamin C**  
 Vitamin C is known for helping to strengthen your gums, and strong gums reduce your risk for gingivitis.

**The K is for Vitamin K**  
 The vitamin is known to help prevent cavities. Additionally, vitamin K aids the body in healing.

**The P is for Phosphorus**  
 The mineral helps build strong teeth.

**The Z is for Zinc**  
 This mineral helps prevent the growth of bacteria and plaque buildup in your mouth.

At your next checkup don't hesitate to ask us about these essential vitamins and minerals and others. We can share ideas for nutritious foods that contain these vitamins and minerals and make sure you're doing everything possible to keep your smile its healthiest.

**VOLUME 7 ISSUE 4**  
**OCTOBER - DECEMBER 2019**

**SPECIAL POINTS OF INTEREST**

-  The Vitamin Alphabet
-  Colouring Activity
-  Kids Club Snapshot

**INSIDE THIS ISSUE**

Colouring Sheet	2
Dental Day At White Marl	3
Kids Club Snapshot	4

MONTHLY PRACTICE NEWSLETTER

# Inside Marketing

- The **BEST** marketing happens **INSIDE** the practice!
- Delivery a **WOW** Patient Experience
- Train staff to leverage **MORE** from patients who already know, like and trust the doctor/practice
- Have systems and tools in place to help automate and streamline the process



# Ideas for Inside Marketing

- New Patient Experience Roadmap
- Appointment Confirmation Protocol
- Inbound Phone Script
- Referral Workflow
- Offer more elective services or cash products
- Ask for Testimonials

## Tips and Best Practices



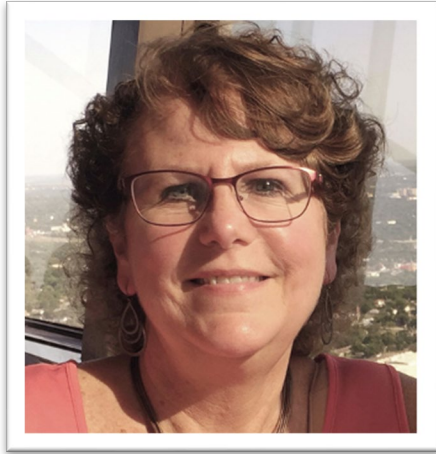
- Train Staff to Close New Patient Leads
- Develop Phone Scripts and Talk Tracks
- Map out a WOW Patient Experience
- Use systems/tools for Referral Workflow
- Education and Train Staff for Case Acceptance on elective services or cash products
- SELL products in your practice
- Develop a Strategic Sales & Marketing Playbook



# Marketing **CREATES** the **OPPORTUNITY** to **GROW** your Practice!



## Q&A



**Carolyn Baruch**  
The Form Team

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