

MEDICAL SECRETARY



BOAZ ADHENGU



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Whether it is an aesthetic practice, medical practice, or any other type of business, there is nothing as important as customer/patient relations. What differentiates successful companies/practices from others is the interaction of customers with people from your office and no one more important from a visibility standpoint as your receptionist.

Your receptionist and front office personnel handle the incoming phone calls, interact with potential customers/patients and is the first impression when it comes to your practice. When patients have questions or need additional information, your front office is the spokesperson for your aesthetic practice. The customer experience over the phone or in person needs to be that of friend and confident, your receptionist needs to be knowledgeable, friendly, energetic, and enthusiastic about the aesthetic or medical services you perform. Your first impression made may be your last impression made to a potential client or present patient, do not minimize the importance of this ambassador to your business.

Unlike other services, the new aesthetic services you will be providing are elective procedures for the patients and are cash basis for your business. These procedures are typically more than the other services you provide so the experience to the patient needs to be “*first class*” and they need to be pampered or they may elect to have the procedures done somewhere else. Your receptionist and front office personnel will be in contact with your patients more than the physician throughout these services so it is extra important to find someone for the position that has the right attitude and energy for the position.

Hopefully you will find this learning guide helpful in allowing your receptionist and front office personnel to become invaluable to you and be an asset and “*profit centre*” to your practice. The tools we present will help achieve this success and will allow you to do what you want to do best [*aesthetic services*].



Who is an “*Exceptional Receptionist?*”

There is no one answer as to who is an “*exceptional receptionist*”, the roles you define and the capabilities of having this person reach your goals and expectations from the position better defines the “*exceptional receptionist*”. The best approach to create exceptional front office staff is to first define goals and incentives for your staff. This is done by planning and teaching the basic skills necessary that will allow for a higher conversion rate for procedures, increased demand for consultations, and increased patient satisfaction. A satisfied patient is your best patient from both a referral standpoint and in nurturing a long-term relationship where the patient will come back to you again because of the pleasant experience and results from the procedures. The following is a checklist of items that should be addressed prior to establishing your aesthetic practice:

1. Define Roles & Responsibilities of Front Office Staff
2. Create an incentive program based upon realistic goals and expectations.
3. Allow for input from your employees in defining these roles, responsibilities, and goals.
4. Cross-train your employees so everyone is aware of the “*bigger picture*”

Defining roles and responsibilities is as simple as sitting down with your employees and inform them of the changes that are going to take place within your practice. Inform them of the new procedures and services that you will be offering and give them a sneak preview of what is to come. Tell your staff that you need their help in achieving these changes and that success is going to be enjoyed by everyone. Responsibilities can start with each employee writing their own job description and defining what they do in a matter of importance. You will be surprised by what they set as their priorities and primary responsibilities. It will be easier to make change when you know what everyone is really doing within your office and your employees will also be willing to explain to you all of what they do. Just like not keeping in touch with the thousands of patient charts one has within their practice so to is being “out of touch” with the everyday operations of your present practice. Some special hints in helping your employees define new roles and responsibilities for themselves are to include statements like:

We need to create a helpful, happy, and cheerful environment. Everyone is important to the success of our new aesthetic practice and I need your help. What thoughts do you have as to how we make the office more efficient and professional? What tools or education do you need to be successful with your present job function and what can we do to streamline your time and efforts?

What most physicians do not understand is your staff is busy working but are they working effectively and efficiently? Do they have the right training, equipment, or support (*supervision*) to do their present job correctly let alone adding new aesthetic services. Getting an understanding of where you are now better allows for you to decide when, how and to whom you delegate new responsibilities for.

One way of motivating your employees and to allow for employees to share in the success of your new aesthetic services is *to create an incentive program based upon realistic goals and expectations*. Most start-up practices or businesses will set income or revenue goals for the coming fiscal period. Financial forecasting is how you gauge success and is imperative to the

planning of your aesthetic or medical practice. How do you expect your front office staff to reach goals and milestones if you do not even define these goals for yourself.

You are asking your staff to become involved and excited about the new procedures you are offering then incentive them to help you achieve these goals. When your whole staff is working toward a common goal then the probability of reaching the goal is real and has a stronger possibility of happening. Incentives should be structured where everyone benefits as a “group” since all of your employees will be involved with your success in incorporating these new procedures. Do not forget about “*retail*” products such as cosmeceuticals, nutraceuticals or other retail products you may incorporate into your new aesthetic practice. These retail products can also be commissioned or have an employee incentive associated with them do to the high mark-up associated with these products. Other forms of incentive can also be in the form of “*non-cash*” type of incentives such as compensation time, gift cards, or further continuing medical education.

Allow for input from your employees in defining their roles and responsibilities, who knows their job better than your employees actually performing their present roles. Use this information and expand on this to create an office environment that is optimized to succeed. Remember, the best ideas are not always your own.

Cross-train your employees, this becomes even more critical when customer service and customer relations is so very important to your new aesthetic practice. Many new and prospective customers/clients will be asking questions of all of your staff not just one person. There will be times when one front office staff member becomes busy and overwhelmed, take time-off, or is pre-occupied with helping someone else. Depending upon your staffing, it is necessary for others to be able to “*jump-in*” and perform the duties of the other staff. These types of cooperation amongst staff members help assure that the goals you defined earlier are met or exceeded. Everyone within your organization needs to be able to help with patients/clients, answer questions, or be able to sell procedures or items. This becomes even more apparent as we go forward and talk further about who is your new aesthetic patient and understand what the patient is expecting from you and your organization.

Remember, the receptionist and front office personnel play a vital role to any aesthetic practice.

Though your whole front office staff is vital to your practice, the patient will have the most interaction with your receptionist. If the new/prospective client is not handled correctly from the beginning, then the likelihood of that person following through with the procedures or consultation will not happen. Too many physicians underestimate the importance of the receptionist or other front office personnel and in many cases do not understand why their aesthetic practice is not more successful. Aesthetics is a business model and to be successful in aesthetics you need to approach your new services/procedures as a business.

This is an opportunity!

Working in the front office of a medical practice can be frustrating and monotonous where every day brings the same issues of collecting deductibles, making appointments, or handling office/clerical duties. The frustration occurs where you believe there are not opportunities for advancement or to make additional compensation as you might feel you are limited in your job experience or perhaps your education background. Incorporating aesthetics within a

practice allows for the opportunity for everyone to benefit from both a financial standpoint and a career standpoint in that you will be involved with and a major factor in the success of the aesthetic practice now and going forward. Many individuals in many key positions have been able to grow in those positions due to their ability to take on additional responsibilities and to take advantage of these business opportunities presented.

As a receptionist, you are the gatekeeper, greeter, manager, and host of your organization. With such an essential role, you need to be able to accomplish these tasks with confidence and efficiency. The opportunity for increased job satisfaction is real and the ability to financially benefit from these new procedures and increase your worth to the company is priceless. No matter how busy you are, your organization depends on you to project a professional image, a first impression people will remember and respect for months to come. Discover for yourself how to improve your skills and better support everyone in your organization - right up to the managing director. In the foregoing pages you will learn how to adapt to change, polish your image, perfect your telephone skills, and increase your value to your organization. You'll also discover how to manage the stress that comes naturally with your hectic schedule - *and enjoy your job more in the process.*

Your Goal as the Promoter of Aesthetic Services

As one of the primary promoters of aesthetics within the practice your goal is not necessarily to “*hard sell*” or force aesthetics on the consumer but to help answer their questions and access their needs. It is much more helpful if

Understanding your New/Prospective Aesthetic Patient

The expectations of an aesthetic patient are different from that of other patients/clients you may be treating medically. Patients are spending their own money for these procedures and not through insurances so the expectations are much higher both from a results level and from an attention level where he/she feels special. These patients are coming to you to improve their image cosmetically and to feel better about them self from a physical standpoint which relates to self-confidence and feeling good “*inside and out*”. It is imperative that the new/prospective aesthetic patient is handled properly from a human level and is looking for you for answers. Your contribution to making this process a pleasant and memorable experience will help ensure a “*patient for life*”.

In general, there are different types of customers that fall into various categories. There is the “*impulse*” buyer who makes their decision based upon emotion and an immediate need for the service/procedure. There is the “*literature gatherer*” who may or may not want to use your services at this time but wants to educate him/herself about the new services you offer. Finally, there is the buyer that has little or no interest in your product/service at this time, it is not that he/she will not want to use your service but not at this time. This consumer is someone you will continue to make contact with since his/her attitudes or responsiveness to your services may change over time.

Know What the Aesthetic Patient Expects

Knowing what the aesthetic patient wants will help you to create a relationship with and communicate with them more effectively. The aesthetic patient wishes to look as great as they feel and is continually in pursuit of bettering themselves from a beauty perspective. In either improving their overall appearance or image they feel embodied in that they are making themselves not only look better but will feel better with added self-confidence. There are many different types of patients, but many fall within the following categories:

- **Maintenance:** Those who do not want to change their looks but to maintain their youthful appearance (*Botox, Dermal Fillers, Chemical Peels, Microdermabrasion etc.*).
- **Makeover:** These patients either do not like a particular feature of themselves or overall appearance of themselves and are looking to change something about themselves (*lipo-surgery, rhinoplasty, ablative laser treatments etc.*).
- **Revitalize:** Those that wish to improve upon their overall looks through cosmetic enhancement or by modifying the way that they do things (*skincare regimen, weight loss, exercise, nutrition*). These patients wish to recapture their youthfulness and/or enhance their present looks.

All of these patients have one thing in common, they all have emotional wants. It is your responsibility to make sure that these wants are recognized and addressed so that the patient

has that “WOW” experience he/she expects. People with emotional wants wish to feel better about them self either from the outside or inside. The reason he/she is having these procedures performed is that she feel that these aesthetic services will make them feel better. It is of the utmost importance that you handle these patients from a human perspective and treat every patient as you would like to be treated yourself knowing the high cost for these aesthetic treatments. Every patient, every time, last time or what you did for them last time but rather how you made them feel when having the procedures performed.

Understanding the Importance of Telephone Answering Skills

No matter who answers the phone, answering of the phone in an effective and professional manner is one of the most important functions of your new aesthetic practice. The impression that the caller receives as well as the information they are given will either be welcoming and inviting to the caller or will turn off the caller where he/she may dismiss your aesthetic practice from consideration. Answering the telephone correctly can add tens of thousands of dollars to your practice or cost you the same or even more.

The sole purpose of marketing and promoting your aesthetic practice is for the phone to ring with prospective clients wishing to utilize your services. Walk up clients and referrals make up a proportionate smaller share of the revenue potential in comparison to customers calling and inquiring about your services. If you consider that new clients make up a large portion of referrals and “*word of mouth*” recommendations you can easily ascertain the importance of making sure that the new telephone caller is made to feel special, comfortable about calling you, and feels that your practice cares about him/her as a client.

That first initial contact leaves a lasting impression on the caller. You have the ability at the time of the first call to start the relationship between the customer and your aesthetic practice that can last for years and be worth thousands of dollars. The choice is yours.

An example of which is also a common scenario that you will encounter. A potential client goes to the internet and finds a list of practices that perform laser hair removal. As a smart consumer, he/she calls each of the practices asking what is the price for laser hair removal? Time and time again, he/she is given the price of +/- \$400.00 per treatment until he reaches *ABC Laser Hair Removal*. Instead of just answering in the same manner as others which you might expect, *ABC Laser Hair Removal* asks the customer what they know about laser hair removal. Please let me explain the process to you and takes about 45-60 seconds to explain the laser hair reduction process, why it takes a multiple of treatments, what to expect as a reduction between treatments, and other information on the procedure. After explaining the procedures to the patient the receptionist then tells the caller the price for the procedure and asks for the business (*consultation*). The patient has now felt comfortable about your practice, you took the time to make him feel special from a human level, and that your practice cares about the results he will achieve. At this point pricing doesn't matter and whether it was \$100.00 more per procedure the client feels comfortable that he/she is making the right choice.

It is important to remember that aesthetics is based upon those emotional factors discussed before and the aesthetic patient is looking for a practice that satisfies those needs. He/she expects and demands to be treated special with every interaction with your practice - *why not have it start with the first time the phone rings!*

The Basic Skills to be an Effective Receptionist

To be the most effective Receptionist the following basic skills needed to be incorporated into your telephone answering skills or greeting skills. If anything, this should be a reinforcement of what you already do and if not you should be conscious of these ideas and see how you can modify how you presently act towards callers and clients. These skills are general in nature but can be applied to almost all conversations and interactions with the clients:

- Positive Attitude (*Happy*)
- Enthusiasm (*change voice tones*) – Enthusiasm is Everything
- Listen (*give caller your undivided attention*)
- Bring a Smile to the office
- Be Helpful (*do more than expected*)
- Be Personal (*talk at their level*)
- Always be Friendly and Respectful
- Be Courteous (*say “thank you”, “please”, and “good-bye*)
- Try to establish and maintain a rapport with callers

Why this is important is that what you say and how you say it tells the customer on the other hand what type of person you are and what type of mood you are in. For example, a flat monotone type of voice implies that you are bored and not very interested. If you are indifferent to the caller then that person most likely believes that you could care less about him/her and not interested in what they have to say. If you are cold or abrupt with the caller they believe that you are hostile and not a very nice person to deal with. While these are negative traits, if you were to answer the phone enthusiastically then the caller believes that you enjoy your job, is very interested in what they are calling about, as well as helping them with their questions or desires. By showing the positive trait of caring for the caller they will also get a better impression of yourself in being interest in their conversation and anxious to be helpful to them. Not rocket science but we all need to remind ourselves how we portray and project ourselves to others.

Enthusiasm is everything

Enthusiasm is contagious; it inspires your other co-workers and patients to feel better about their day as well as their general wellbeing. Even if you do not always feel enthused, act enthused and you will see for yourself how much better you feel.

Listen: You might be surprised what others are saying

People who listen know when it is time to talk, they do not anticipate what the other person might say but rather wait until it is time to talk. Learn to listen with a clear, objective and open mind as to what patients are saying to you before finishing their sentences or interrupting them. Always make eye contact with them and if necessary take notes as to what they are saying – *you might be surprised to what they say*.

Bring a Smile to the office

Whether it be adding humour to your patient interaction or to help disarm possible hostilities with problem patients, a smile makes you more likeable. It helps you to connect with people, makes a positive impression and will bring a smile to someone else. Humour works well in showing that you don't take yourself too seriously and often has a way to relax a situation. Whatever works for you the most important point is to be natural and make that connection with your patients. If you are not a funny person; don't try to be funny with the patients but a smile is something all of us can do.

Be Helpful: Do more than expected

It sounds like common sense and it really is about common sense as to what the customer expects and how you would like to be treated if the role of customer and receptionist were different. Be courteous, respectful, and helpful – *you will even feel better yourself about it.* Fundamentals of Answering the Telephone No matter who answers the phone, there are simple fundamentals that everyone must understand. These fundamentals are important and not misnomers though they are simplistic in nature:

Be Thankful that the Phone is Ringing
Give the Callers Options
Image (*First Impression*) is Everything
Spreading the News
Simple Protocols for:

- Placing Callers on Hold
- Transferring Phone Calls Properly
- Right Way to Take Messages
- Answer the Phone during Lunch Hours
- How to Relate to a Caller
- Answering Messages Promptly
- Reminding Patients of Appointments

Educate yourself on Procedures
Answering Frequently Asked Questions about Procedures
Using the Physician's name in Conversation
Enthusiasm vs. being Obnoxious
Answering Inquiries about your Practice or Procedures
Call Backs - Return Phone Calls

Be Thankful the Phone is ringing

Besides sometimes the annoyance of the phone ringing off the hook, or whatever can go wrong will go wrong type of days, the phone should be considered your best friend to your aesthetic practice. The telephone should not be a distraction but as an avenue to new patients for your practice, these callers are interested in learning more about what your practice has to offer so be thankful. For those present patients that call it is a reminder of the relationships that you have with these clients who want to see you again.

Answer the telephone with enthusiasm and give them your undivided attention. You will quickly bond with them and if you give them accurate, good information they most likely will want to go the next step of the sales process whether booking an appointment or consultation of your services.

Psychologist or Receptionist?

It will feel sometimes that you are not the receptionist but a psychologist for your patients. At the same time you are a salesperson for the company whether you realize it or not. Many do not see themselves as a "salesperson" in the true sense of the word but unknowingly you will be selling these aesthetic procedures and promoting aesthetics. Aesthetic medicine is retail (*cash basis*) medicine where patients have choices. Patients are paying "*out-of-pocket*" for these procedures rather than a medical plan so they have the opportunity to change providers.

It is necessary that these patients be able to bond with you and enjoy conversing with you and possibly take their friends with them.

So think of yourself as a psychologist and follow these simple steps. Remember, in many smaller practices you are the salesperson, psychologist, and receptionist - helping out patients from a physical and emotional standpoint and in providing solutions to their problems.

- Listen and asks questions to help you understand what the patient wants or needs
- Give them an answer to their questions as you would expect or want them given to you
- Let the patients come to their own conclusions, but ask for the business

It is helpful to understand the psychology of the aesthetic customer as it gives an insight to their perspective of these procedures. Typically customers want to look as good as they feel, continually want to improve themselves and their looks, or have something that they do not like about themselves. There are many motivating factors as to why they want to improve their image and range from suddenly single to unemployed to turning back time and Mother Nature. Part of your job is to find out what is their motivation to why they are looking for aesthetics. Patients don't really want Botox or Fillers or other aesthetic procedures, they want the feelings that come from those procedures which may be to become better looking or more confident.

The patient has a need to feel better about them self and feel that these aesthetic procedures will give them these positive feelings they are looking for. For many they may not even know why they feel the way they do but these patient fears and needs are common traits in all:

- **Fear of rejection:** Patients feel they will be liked better by friends and loved ones if they look better.
- **Need of Acceptance:** Patients want others to like them and believe that if they look their best people will accept them better.

Developing Rapport with the Patients

Not all aesthetic practices require the receptionist to be the cornerstone of sales, however in smaller practices everyone will wear different "hats". The physician and others will be unavailable at many times so the techniques associated with selling will sometimes and often fall on you. Many times the patient will look for answers from the closest individual within listening distance and that will involve you. Not only are you the receptionist and psychologist but also you will be the salesperson or spokesperson for the practice.

There are certain ways of selling without being aggressive and there are certain attributes that you can portray that are proven to work well. The next few sections will give common sense steps to showcase yourself and portray the practice in a positive, professional manner. The first step to selling is to develop a rapport with the customer, this requires you not to sell anything but to bond with the patient to make them feel comfortable in making a decision on the services that your office offers. Bonding with the aesthetic patient is 80% of the sale. The more comfortable the patient is with you, the more information they will share with you and make a decision. Bonding with patients is simple, but certain ways have been proven to be effective:

- **Smile** - its contagious and is the universal language.
- **Eye Contact** - people sense when someone is talking directly to them and is often perceived as being honest and interested in the other person when conversing.
- **Touch/Feely** - sometimes a simple touch (*above the elbow*) on the arm or shoulder makes you more personable to the others thus creating a stronger bond with the patient.
- **Remember their Name** - remember their first name and use their name often. This shows that you have a real interest in what they have to say and want.
- **Your Attention** - it is relatively easy to be side-tracked by other external factors going on in the office such as phones, other conversations, and other people asking for your attention. It is important that you are only interested in them and their situation.

Welcoming the Patients

Welcome new and existing patients just as you would a friend or relative coming to visit your home. Go out of your way to make the patient welcomed. Most patients are a little intimidated or might feel uneasy to be having these procedures done so greet them with a smile:

Hello Susan and welcome to our Spa/Practice

Give the Callers Options

When on the phone have you ever been frustrated that you cannot seem to have people work “*outside the box*” to help you with answers to your questions? Even if you are asked for something outside the norm of your practice give the caller options and alternatives to their answers. These options could be alternative treatment options, time/scheduling options, or even payment options for procedures. The fact that the other person took the time to call shows an interest in your practice, keep the caller interested in what you have to say and allow them to work with you to work within the services and options you can give them.

Image (*first Impression*) is Everything!

We have all seen the commercials for Cannon cameras where “*image is everything*” and it is true especially in business. Part of any business is to project an image to the customer of your business that makes them believe and want to do business with you. Image is typically defined by the type of services you offer, the type of clients you have, or the website or printed matter you distribute. If you are offering “*high end*” services or have an upscale clientele it is always important to remember who you are talking to and be prepared to be a “*harlequin*” and appease the person who you are talking to.

Spreading the News

Many times we add new services and find out they are not successful, why? Because we haven't communicated these new products or services properly to our patients. This is especially true in a medical office setting where aesthetics has been added, not all patients come to your practice at the same time so even if you have **3 - 4,000** patient charts it may take you the better part of a year before you are able to communicate with these patients in person. Be proactive when you are offering new services and products, this can be done in a variety of ways:

- Patient letters / Educational Forums
- In-Office Brochures / Displays / Information Statements
- Through interaction with patients
- Website or other form of media
- Patient Reward / Referral Programs

There is no right or wrong way to spread the news about your new services or products being offered there is only negative effect of doing nothing that can determine how successful you are. Patients are always looking for answers to their aesthetic needs whether they may be considering them now or at a later date. Let everyone associated with your practice be current as to what is new in your office or practice and let the patient decide what might be applicable or of interest to them.

Simple Protocols to follow when answering the phone

We should all know how to answer the phone but there are some tricks to successfully making the client feel at ease or have a pleasant experience when calling your practice.

- **Placing callers on hold:** There are times the phone will be ringing incessantly and you will need to place the caller on hold. Typically it is not something the caller really wants to hear and therefore there is a proper way to put a client or patient on hold that can keep them patient and understanding. When placing a client on hold it is necessary that you communicate with them why you are putting them on hold and to assure them that you will be back with them as soon as possible. Saying “please hold” does nothing for the person on the other end, setting expectations and importance of their call makes them feel at ease when putting them on hold.

ie: Good Morning, “(name of practice)”, thank you for calling, your call is very important to us, would you be OK with me putting you on hold momentarily until I can finish answering another call. I will be right back – thank you!

Hi Janice, I have another call coming in but really would like to finish our conversation, would you be ok if I get the other line real quick. I will be right back with you as soon as possible – thank you!

In both cases you were able to explain the reason for putting the call on hold and also set expectations as to how quickly you will be able to help them. People are much more understanding of interruptions when these two variables of why and when are explained to them in a polite and courteous manner.

- **Transferring phone calls properly:** It is very important to the other person what to expect when transferring phone calls since they may be prospective customers or clients presently. Showing them courtesy and professionalism not only is reflective on yourself personally but on the practice as well. There is a difference between being efficient (*transferring the phone quickly*) and transferring the phone correctly. Take the time, be personable and make them feel comfortable that you are going to complete their task correctly.
- **Right way to take messages:** Similar to transferring the phone and other phone tasks certain underlying principles apply when taking messages. Foremost, you need to apologize for the inconvenience to the caller as to why you cannot complete their request to talk to the person that they had wished to speak to. Secondly, you need to assure the caller that their request will be handled properly and that the party will receive their messages at the earliest possible point in time. It is also very important to ask the party what the message they wish to leave is in regards to so that it may also be answered by someone else in the practice. At times these messages may also be important to the practice so it is extremely important to find out why they are calling. We have all played “phone tag” with various people and many times have given up in trying to reach the other party. We have also have had the experience of having to leave messages for important issues that need to be resolved, try and minimize the negative things that could happen by mishandling messages.

ie: Good Morning, “(name of practice)”, thank you for calling, no Dr. (name) is not available as he is with patients (*or for whatever legitimate reason*). If I may ask what this is in regards to? Is it important or urgent? is there someone else at our office that can help you with this? I will make sure he gets this message as soon as I am able to reach him or get his attention. Thank you for calling and have a great day!

The actual conversation or wording is not as important as to the fact that you acknowledge the caller concerning his/her need to reach an individual within your practice and gave them the opportunity to leave a detailed message and priority to the message. Again the professionalism and courteous nature that you answered the call will impress the caller and give the impression that their telephone call to your practice will be returned which is what they are expecting.

- **Answer the Phone during lunch:** As much as we all need a lunch each day, the phones still need to be answered by a human voice not a machine. Most professionals use their lunch time to make appointments for aesthetic services since their schedule does not allow them this freedom during the work day. Additionally, lunch is typically the middle of the day for most people and they are able to take a break from their busy schedules to make appointments. Late afternoon and early evening telephone calls are

also quite common for the very same reasons of being after work or after school for stay-at-home parents.

- **How to relate to a caller:** Everyone is different and though there are as many personalities as there are callers, you should make a concerted effort to try and relate to the caller. Many times relating to a caller is accomplished by being cheerful and polite on the phone and allow the conversation to go from there. Trying to create a connection between you and the caller goes a long way in keeping that person on the phone and allowing him to inquire about your practice and services longer than otherwise being “too direct” with that person. One rule however, be yourself - don’t try to be someone you are not on the telephone.
- **Answer messages promptly:** Even though it is our intention to answer every phone call personally there will be times when messages have been left either through voice mail or through your night answering service. It is imperative that these messages be answered quickly otherwise you risk the possibility that the person calling has called someone else for their aesthetic needs. Unless they are already a patient of your practice the likelihood that the caller would wait any extended period of time to receive a call back from their messages is very small since they probably acquired your phone number by the internet and will go back to the internet to find another practice to satisfy their aesthetic needs.
- **Remind Patients of Appointments:** Most likely this is already being done and performed within your practice but it is always beneficial to mention it again. Given modern technology we can now contact patients concerning their appointments via e-mail, voice mail, postal mail, or by calling them on the phone. If at all possible it is best to contact them via the telephone since this allows for more interaction between your practice and the patient. It is the small things that maybe your practice does differently that can ultimately distinguish yourselves versus the competition. Personal relationship building is always a cornerstone for any successful business.
- **How to handle a “long-winded” patient:** There will be those patients that like to go on and on about their problems, families, friends, others etc. that talks way too much. Since you probably will not be able to listen to their whole story or want to listen to them any further there are certain key phrases that can diffuse the “talk too much” patient.

I understand what you are saying maybe we can discuss later when you come in

Sorry to have to cut you short, but

Or tell them at the beginning of the conversation that it is hectic but let me spend some time with you to see if I can help

Try and be diplomatic and polite, it is harder than you might imagine to cut short a conversation with a “*chatterbox*” but find your opening and take it to a conclusion. It is best to acknowledge what they have said and focus on them coming in for an appointment or consultation.

How to initially handle a disgruntled (*angry*) patient: Unfortunately, as part of the front office or receptionist responsibility you will have to deal with the disgruntled patient from time to time. It is important to realize that the patient is not upset with you personally but unfortunately you are the first contact with the patient. For whatever reason the patient is upset or dissatisfied do not allow yourself to take it personally and try to remain calm, composed, and professional which hopefully will help diffuse the situation. However, do not interrupt the patient when they are in that state of mind – *listen to everything they have to say and let them vent their frustrations.*

Hopefully the frustration and anger will not last too long, when the patient has finished it is very important that you acknowledge to them that you heard them and understand how upsetting this issue is to them. Only then can you start to respond to whatever issues were raised, however be prepared to give a neutral response to the patient. Never put the aesthetic practice in an awkward position by agreeing that the practice did something wrong but rather you will do everything you can to help. By acknowledging what they have said and assuring them that you are here to help them this can lead to yourself offering solutions such as making an immediate appointment, contact the physician immediately, or offer some sort of resolution.

Sometimes however people are just rude and miserable about the whole situation. At times it may be necessary for you to tell the patient that they need to control their anger or that they need to realize that you are trying to help them. Sometimes it works and then there are still those people that have no social skills – *if the latter is the case just politely tell them that you are going to “hang up” on them and when they are ready to resolve their problems to call back.*

Don't forget to ask for e-mail address

There are short-term strategies to marketing that the practice is going to use and there are long-term strategies to sustain growth for the aesthetic practice. Collecting of e-mail addresses are paramount for all marketing since it is used for sales campaigns and to keep in touch with prospective customers or present customers throughout the year(s). The concept of “constant contact” is now fundamental to the practice’s marketing efforts and allow for an inexpensive yet effective way of communicating special occasions, special offers, or new procedures that may be added. Staying in touch with prospective and present patients require up to (5) contacts before it becomes relevant in their minds – *having the e-mail addresses of these people make it easy and invaluable.*

Educate yourself on procedures

The more you know about the procedures the more you will be able to help prospective customers and patients. You are the first person people meet and most likely ask questions about the procedures you offer. Learning the procedures you offer makes you more efficient and of value to the practice as well as allowing you to be part of the team.

Most aesthetic procedures are not difficult to learn let alone to be educated on the procedures that the physician will be administering them. Being able to help patients, do more than what is expected, and being another source of information for patients/customers is invaluable.

Additionally, when you are able to help sell retail (*cosmeceuticals/nutraceuticals*) and other services you will be able to benefit yourself financially as well as being an asset to the practice. It's a win-win situation for all involved, it helps you grow professionally in your job function and benefits everyone else immediately associated with the practice.

Answering frequently asked questions about procedures

Educating yourself on the procedures as previously discussed will give you the foundation necessary to answer those questions most frequently asked. After a period of time you will learn that most of the questions asked over the phone will be repetitive and can be easily answered once you have a better understanding of the procedures. Listen to how your other office staff is able to answer these same questions and formulate the answers that can give the caller or patient the knowledge to make an educated decision about his/her aesthetic need(s). An educated buyer is your best customer/patient. Additionally, you do not want to have to burden the physician or other front office staff for the same questions and answers about procedures since their time is valuable in treating patients and other functions.

Using the Physician's name in conversation

When speaking with patients or prospective new clients use the name of the physician. By using the physician's name it gives you a basis for whatever medical or aesthetic advice you are giving. The patient will look more to you as a liaison between you and the physician since their contact with the physician will most likely be limited in comparison with their access to you. The sense that people will see talking to you similar as speaking to the physician directly gives additional credence to what you have to say to the patient/customer. You want to speak from a position of authority when talking about procedures, services, or expectations so using the physician's name is beneficial as well as having the person on the phone sense that they have a relationship with the physician.

Enthusiasm versus being obnoxious

We all have had the experience of speaking to someone and saying to ourselves "*nice person but very annoying*" – this is where we need to curb our enthusiasm at the risk of otherwise being obnoxious. Sometimes people get too excited over what they are talking about, don't take the approach that everyone necessarily wants all of the aesthetic services, refrain from making ridiculous promises to patients or prospective patients, and don't expect to close every phone call for consultation or appointment. Many consumers/buyers of services are in the "gathering information" stage of making a decision, respect the fact that it is better to give a professional image to these prospective patients. Other consumers/buyers of services will make their decision at a later point in time that may be a long time in the future – *these same people will at a later point in time either due to financial considerations or because of a future event will be in need of your services*. Everyone that calls is a potential customer at some point in time.

Answering Inquiries

Without repeating the obvious, all inquiries should be approached as a potential sale now or possibly at a later point in time. Take advantage of the opportunity to make a good impression on the caller and give the caller a great experience on the phone using the tools and ideas discussed so far. People will remember who you are and their impression of the

practice will leave a lasting impression that they most likely will act upon when the need arises.

Acquiring new skills and growing into a more important role

An aesthetic practice as stated prior is different from a medical practice – *it is more of a business model than that of a traditional medical practice*. With the changes that need to take place within your practice you will need to acquire new skills that otherwise you may not have realized you need to perform your new responsibilities. Everyone, including the physician, front office personnel and the receptionist need to take a proactive role to ensure success of these new services/procedures. The important thing to realize is that even though it does sound like and is more work for you the opportunities for advancement, acquire new skills, and the opportunity to increase your personal income are real. As part of your duties in an aesthetic practice the front office/receptionist will need to perform and acquire the following skillset:

Tracking Marketing Efforts: The new practice will be spending large amounts of monies on various types of marketing efforts. These efforts like any types of marketing are “hit” or “miss”, some are successful and others are not. What makes it important is that if properly tracked you can start to see what services are in demand from which type of media. Typical types of media include internet e-mail campaigns, newspaper/magazine advertising, radio advertising, movie theatre, billboards, or mail campaigns – *you get the drift. If properly tracked, everyone will know where advertising dollars are better spent and which types of campaigns are successful*. Marketing efforts are always changing and will continue to evolve as the practice moves forward and being able to focus on what is successful in terms of marketing for the firm will allow the practice to achieve its sales potential which in turn will benefit everyone involved.

Tracking Advertising Campaigns: Same concept but different in that this type of tracking involves more the content or message being offered in the ad, not necessarily the type of media being used. For example, radio advertising should give you a certain return (*phone call inquiries*) if the response is poor then you need to make the distinction whether the content of the ad was poor or was it not the right type of media being used. Tracking of advertising campaigns is typically determined by running these same radio spots more than once, at different times of day, or have different ads running that have different content. There are other means of tracking that can be used but the point is you as the front office/receptionist needs to be the one to help determine what works and what does not work. The physician will want to know this type of information but will not be able to because of time, not being able to answer inquiries, and his own work schedule. As you can begin to see you are vital to the success of the practice and essential to almost everything that happens within the practice. The opportunity to grow professionally by acquiring new skills will prove to be invaluable now and throughout your business career.

Qualifying the potential patient: So what happens if the phone does ring and the caller is asking for everything or doesn't know what she wants? Qualifying the potential patient over the phone will be necessary at times so that your time or the physician time is not wasted. Qualifying a potential patient is not difficult especially if you ask the right questions. If the caller is willing to give you enough personal

information about his/herself then there is a good possibility that they will follow through with either the consultation or appointment. Again don't forget to ask for her e-mail, phone number, name and other information and have a list of questions to ask such as "have you ever had aesthetic procedures done prior", "what services are you interested in", and "when would like for us to contact you". It seems like a lot of information for someone to give considering they were looking for maybe a quick answer to a question but it can also gauge the interest of the caller and you can start to weed out dysmorphic patients that are inevitable to any practice.

Converting phone calls into consultations or appointments: The endpoint to the prior topics discussed deals with converting phone calls into consultation or appointments. This is the intended action that we will want to accomplish from the phone ringing. The telephone is the primary way that prospective customers/patients will be communicating with you and how you handle their concerns on the phone determines their next course of action. The whole process can be broken down to be that simple – turn phone calls into consultations or appointments. Everything that we discussed prior hopefully allows you to create that bond over the phone, create professionalism, answer their questions, and make them feel comfortable that they have made the correct choice in calling. So how do we convert these phone calls? Again, the answer can be as simple as "asking for the business":

"would you like to make an appointment to see the physician"

"is there something else I can do to help you – we offer free consultations"

Either approach or any other approach to try to have the caller make a decision is correct. The fact that you asked them to make a decision on how to proceed is what is most important. In many circumstances you have only one chance to make that impression, the caller called the practice because of a perceived need so do be afraid to ask the caller if they want to move forward in addressing his/her needs.

Be confident – *it is not that difficult!*

We discussed many topics in the preceding pages that may or may not end of being part of your specific responsibilities. Many of the insights and topics are common sense or maybe you just needed a reminder of these topics, whatever you get out of this guide you need to be confident that you are the right person for the position and increased responsibilities as your job will become much more visible to everyone. This is not "rocket science" but if these topics help you mould your approach to answering the phone or dealing with customers/patients then you will be successful. There is no "right way" or "wrong way" of doing things other than the obvious but sometimes just the knowledge of knowing what works and has worked in other practices make the difference from being average to becoming exceptional.

To Whom It May Concern

There are all types of offices and aesthetic practices, some will be smaller than others and in many offices employees will have to wear many hats. Whether large or small, all of your employees are potentially salespeople of services and products, therefore it is important that everyone understand the selling cycle and be aware of basic business principles associated with selling. It does not mean that you shouldn't structure or create specific responsibilities for individuals within your practice as to sales, consultations, and follow-up patient interaction but there will be circumstances where these responsibilities overlap when interacting with patients.

Whoever is designated to go through the initial patient consultation or sales process everyone needs to be familiar with the cycle and the decision making process of the patient/client. There are different types of buyers, buyer habits, and needs that are specific to aesthetics, understanding your new client/patient is paramount to fulfilling their expectations and needs.

Consultation (*Patient Interaction*)

Whether the physician or at times other members of your staff consult with patients, there are certain fundamentals that should be applied to any patient interaction. These fundamentals are important and not misnomers though they are simplistic in nature:

1. Focus on the Patient - *what is really important to them?*
2. Don't pass judgment on, blame or gripe about others (*quite complaining*)! Be the person you like to be around whenever you can.
3. Patient names are important to them. Use them often and with respect.
4. Listen to the Patient - *encourage them to talk about themselves*. Patients give us the answers when we take time to listen.
5. Smile, expect ingratitude!

It is very easy to change the focus of a conversation, complain about your own problems, address the people you are talking to in third person, and control a conversation. All of these mistakes can "*turn-off*" a potential client/customer and defeats the purpose of the consultation. The patient needs to project his/her desires for change in their appearance and you need to listen and promote them talking about these needs. This allows you to better understand the patient's desires and needs that will help you formulate a desired treatment option to meet their expectations.

An integral part to any aesthetic business is creating these personal relationships with your clients/patients. This rapport is established by creating conversation/dialog with the patient, having the patient explain why they are here, and getting to know them at a personal as well as professional manner. Patients are not always the most articulate so pay attention and listen closely to such phrases as sick of..., fear..., or dream of... in the conversations. If we know their standard motivations in advance, we can prepare for them and manage their expectations / the difference between a 22 year old and a 44 year old — for success favours the prepared mind. Most patients have a shopping list of items they would like to change about themselves, be patient and listen to their complaints and above all keep an upbeat, professional demeanour towards yourself.

Consultation (*Sales Process*)

The consultation process is a precursor to sales, most patients/clients need your professional expertise to help them make decisions concerning their treatments. Aesthetics is a business and has many similar concepts as to any type of business or services company. The approach you take in the consulting process with potential patients/clients helps shape the way that customers will process their own decisions and make a decision on the services you offer. In order to define the sales process, we will focus on three distinct phases of your consultation:

- Evaluation
- Education
- Conversion to sales

During the evaluation process, you want the potential patient/client to open up and discuss with you their concerns and wishes for change. The principles explained in the proceeding section point out some basic principles to follow during the consultation process but how do you create the type of interaction needed to make the patient comfortable with you and tell you what their concerns are. Many patients will just say “whatever you think” or “I don’t know”, this may sound like an invitation to ask for the business but is contrary to how you want the evaluation process to be. The types of questions or sample questions that can help you jump start this process could be as simple as:

What brings you here today?

What would you like to change or improve about yourself?

Why is it important to you or what is most important to you?

Have you done this or have experience in having these procedures done before?

Are there any events do you have planned in the near future?

Is there any other medical issues or aesthetic issues you may have questions about?

As you can determine, there are many different approaches but the endpoint is the same. The patient/client needs to inform you what their desires are to match your services to their needs. Whenever the patient is part of the process they tend to be more apt to make a decision to start procedures rather than deferring.

Creating this type of interaction between physician and patient is invaluable and forms the foundation for the concept “*a patient for life*”. Just as your receptionist or front office personnel create a first impression that is the beginning of hopefully a long lasting personal relationship, so are you.

The consultation process allows you to relate to the patient, don’t miss out on this opportunity as you may not be able to capture this type of opportunity at a later date.

The education portion of the consultation process allows for you to be the “*expert*” and for you to showcase the services and solutions you offer. Be aware there is “*overselling*” yourself to potential patients/clients but the benefits of having an educated consumer has the most potential to become an educated buyer. Some points that you wish to address when educating your patients may include:

- How their conditions are caused or why it is normal to have a condition like theirs
- Speak as an authority, speak with confidence but remember who you are talking to

- How you can specifically help them - *and not necessarily just technology.*
- How your practice can help them with other related aesthetic issues in the future or after addressing their current concerns.

Again, there is no set way of addressing these issues and everyone has their own style of speaking to others. Consideration of whom you are talking to should also factor in your explanation of procedures and education of the patients as it relates to their condition. Be personable and take their questions as many do not understand many of the concepts you will be presenting. Finally, be prepared to put on “many faces”, try and relate at the patient/client’s level whether it be young or old, outgoing or reserved, personable or professional - it gets easier the more consultations you do and the more interfaces you have with customers.

At times you will find objections to what you say to potential patients/clients. Whenever confronted with various objections it is necessary that you cushion these objections, have them clarify these objections, and respond to them directly even though to you they may be frivolous or non-consequential. Eliminate medical reasons not to proceed during the education, eliminate emotional reasons not to proceed during the evaluation, and financial reasons not to proceed. By addressing their hesitations about proceeding with various procedures you eliminate the doubt and potential roadblocks to convert these consultations to sales.

Remember, not everyone is a salesman. You may not always have to be the salesman so you and your staff need to be aware of the consultation process. Whether it be skin care or surgical procedures you and your staff must be able to talk with potential patients/clients about procedures. If handled correctly, conversion is as easy as asking for the business. Never ASSUME they have not already decided to move ahead – “*Ask for the Business!*”.

“Are we ready to start with the procedures? What would you like to do?”

“Would you like to begin today, later this week or the beginning of next week?”

“When would you like to proceed with the procedures?”

“If you do not wish to start today, when would you like us to contact you?”

You should be able to close well over 80% of all consultations face to face. Whether you use this approach or a team approach the results should still be well over 80% closure to the consultation process. This is just one of many reasons why your front office staff is so essential to your success in aesthetics.

Specific topics and tools to help you succeed

As part of the consultation and sales process you will find that every consultation is different and every individual is unique in his/her needs and personality. To be able to get better at the consultation and sales process there are different specific topics and tools that will help you succeed in converting these potential clients into patients. These are not stand-alone but can help mould your approach and give you the confidence you need. By being able to identify various types of customers, read body language, and uncovering their problem and giving the patient real solutions you will create the sale. Remember, your goal may be to close or convert every consultation to sales but realize that is not reality as patients can have hesitation or misgivings of having these aesthetic treatments no matter how well you did everything correctly in the consultation.

Decision making processes of Aesthetic clients

How to read body language

Uncovering the problem

Show emotion and empathy to their problem and to the solution

Other closing techniques

- **Decision making processes of aesthetic clients:** Many people use their senses in making decisions either consciously or subconsciously. There are people that visualize what the procedures can do and can make decisions based upon a mental picture they can see from before/after pictures or other types of animation. These patients will say something similar to “*I like what I see*”.

Then there are other individuals that use their other senses such as hearing and the touch of feeling. They make decisions based upon what is being told to them and physically feeling or touching samples or products (*including equipment*). For these potential clients show them your facility, let them try samples during the consultation, and allow your staff and others to tell them about their own experiences about the procedures. Testimonials work very well with these types of individuals.

Finally, there are those people that will make decisions that make sense to them. To achieve a decision with these potential patients you need to answer their questions and tell them “*why*”. Give them all the pertinent data, facts, and reasons to justify their decision to use your aesthetic services. Typically, if it makes sense to you it will make sense for them.

- **How to read body language:** The science between associating different gestures of the patient and what the person listening is thinking is used by everyone from social workers, attorneys, psychologists, psychiatrists, and mothers everywhere. Body language can also be used when consulting with the prospective patients since you want to get a handle as to what may be stopping them from going forward with various procedures. If you understand what they might be thinking then you can help put them at ease or stop their misgivings of what you might be saying. Be careful not to let them read your own body language and always try to portray a open and positive body language.

Skepticism, Anger

Squinting, Frowning
Turning body away
Crossing legs/arms
Blushing/Flushing of Face

Uncertainty and Indecision

Puzzled look
Biting lower lip
Head tilting
Fingers over mouth

Evaluation/Decision

Nodding, Squinting
Maintains eye contact
Grabbing the lips/chin
Tilting head slightly
Placing hands on chest

Suspicious

Avoidance of eye contact
Covering of the mouth
Crossing arms/legs
Moving body away from yours

Again, this becomes second nature and you will eventually incorporate these observations as you are consulting with the prospective patients. If you don't feel comfortable during the consultation, look over at the prospective patient – *they might be telling you something*.

- **Uncovering the problem:** Many potential clients will come in and not be able to tell you exactly why or what they want. They say such statements as “*whatever you think*” or “*you tell me what I need*”. This is not only awkward for the person consulting with the client but may not be the best approach in trying to close the consultation. Somewhere during the consulting process you will need to get the other person to open up, discuss his/her problems with you, and talk about opportunities and treatment options. When the other party is involved in the treatment plan they are more inclined to go ahead with the treatments and compliance will be higher. This is especially true of weight loss long-term, smoking cessation therapies, or even pre/post-treatment options.

The other benefit in making the potential patient interact with you is that it can lead to additional treatment and procedures at a later point in time. By being able to point out other areas of concern along with his/her primary aesthetic concern you are now able to establish long-term treatment goals and have the patient create more of a “laundry list” of concerns that you can go forward with at a later point in time.

- **Show emotion and empathy to their problem and to the solution:** Be excited for and reassure the potential patient that they are making the right decision. Aesthetics is a personal decision and reassuring them of the potential patient's choice is needed and wanted by that person. Even if there is still hesitation after agreeing to procedures it may be necessary for the person consulting to again reaffirm the potential patient's decision. As discussed throughout this manual you need to relate to the patient, create a bond, and share with them based upon their personality insights, photos, or additional explanation for the services.

Even if they are not able to go ahead with the procedures at this time it is the better course to thank them, tell them that you are here for them when they are ready, and will stay in touch with them so if the situation changes or if they need anything else they can count on your future consideration. Sometimes the potential patient needs to think about it for a couple days or formulate a reason to justify the treatments which may be one day, one week, or six months later. Many times when people decide not to use someone's services they never go back to that person for future services, always keep the door open for future opportunities.

- **Other Closing techniques:** At times, especially as the sales process drags on, you may need to force the issue as to the next logical step the patient will take. There are different approaches to take but basically you are trying to help or make the patient decide “*if*” and “*when*”. Don't give them the choice of “*if*” they will book a procedure but give them the choice of “*when*” they will book their appointment.

Rather than giving the patient the out to go back and forth ask them a question they can answer yes/no to that will create closure to your consultation:

“Dawn, do you prefer our package price for (5) treatments for micro-peels or a package of (3) treatments – you can save over \$200.00 for the (5) treatments?”

“Dawn, we have a monthly special on combination packages of both Botox and Filler as compared to having the Botox and Filler separately or would you just like the Botox treatment – you can save over \$150.00 on both today”

“Dawn, to let you know we can now finance any of the procedures we do as we use Care Credit, would you like to go forward and start the paperwork? It doesn’t cost you more, but gives you the option to pay over time.

Have you ever been talked into something? We are not suggesting that you deceive the potential patient but at the same time make them answer the question and force them into any objection of going forward with the procedure.

Another closing technique is to assume that the patient is going to book and go forward with the procedures suggested. Again, we are forcing the potential patient to object to the procedure and in going forward with the treatments. If they do not object or they answer your questions then you can assume yes and continue moving forward.

“Dawn, let’s check the schedule and see when we can get you in here.”

“Dawn, what day do you want me to book your treatment, the doctor is very busy but I have some dates for this week.”

“Dawn, do we want to schedule all of the treatment appointments now so you do not have to call each time to setup a time, do we know what dates work for you?”

The most important point is when your prospective patient agrees to the procedures no matter what technique is suitable for that person – *stop talking about the procedures. Go back to creating a bond with the patient and relationship building* – the patient has agreed to the procedure so don’t go backwards.

How to handle patient objections to solutions

There are times that the patient will object to the solutions you are offering, sometimes it is because they don’t like what you say but many times it is due because they do not understand. The positive you need to take from this is that they are seriously contemplating the procedure and have not dismissed your suggestions for treatment. The objection can often be overcome by giving them more information, educating them, or convincing them by creating a confidence and trust in you that the procedures are the answer to their reason for visiting.

When patients object to what you are saying many times it means that you haven’t fully expressed what you needed to portray for the potential patient to make a decision or go forward with the procedures. Objections can mean that you haven’t created the trust or confidence of the patient or haven’t given them answers to all of their questions (*lack of information*). Perhaps you haven’t expressed strongly enough the need for the procedure or an urgency to correcting the reason why they are there. Uncover the real objection to what you are saying and make sure the patient clarifies their objection. Don’t be afraid to answer

objections with questions or relay an anecdotal story similar to what the patient is saying to you and the result of the treatments. Not only will the patient feel more comfortable in the interest you are affording them they will also feel less defensive as you try and overcome their hesitation or objection.

Don't be offended or frustrated with patients objecting to your solutions as many will change their mind. It is important however, that the patient change their mind based upon them realizing they need to get the solution and never feel pressured. Finally, don't be afraid to add emotion or simulation to the patient's apprehension by saying:

I know how you feel
Many of our patients felt the way you do but.....
Now they are thrilled with the outcome and wished they had these treatment done sooner

There are other objections you will encounter in regards to scheduling or closing procedures during the consultation process. Objections over no money, no time, no need at this time, procrastination, or pricing objections will happen. The point you need to take from this is that most of the time it deals with price and the other objections are an excuse. Without creating a "boiler room" mentality to sales or putting too much pressure on the prospective patient try to keep talking and see if there is a solution. This could be a lower price, financing options, or scheduling her procedures after hours. What is important that there is about a 80% likelihood that they will not go forward at a future point in time or when they have had time to talk themselves out of having the procedures. You might be surprised that by continuing to talk to them you can find solutions to overcome these objections as well.

Other negotiating strategies that work

Even if you have higher prices than your competition or there are many objections to the pricing you are giving to patients there are other ways of dealing with these types of objections that may reduce the number of objections. There are also other strategies that can help the patient make up their mind as to the procedures or giving the patient some other type of "value add" to the procedure to make it seem fair and more equitable to the patient. These strategies don't always need to be incorporated into the consultation but for many potential patients they help mould their thinking into a positive response:

Positioning your Services
Scarcity in Reverse
Power of Investment
Including "Value Add" to the equation
Compromise
 ✓ **If – Then Scenario**

The concept of positioning your services implies that you have painted a picture to the prospective patient that they do not have an option to negotiate price. This works well when you are the only practice offering these types of procedures or the doctor has an expertise in these procedures that patients cannot readily receive somewhere else. Even if pricing is not an issue there is always room for positioning within the consultation so the patient perceives that they need and want to have these procedures performed by you. Most patients are not looking for the cheapest price but rather need to be convinced about the results they will receive at a fair price.

Scarcity in reverse uses the business concept of competition in reverse. Anthony Robbins and other inspirational type of marketers use this concept by making the person feel that the services or products are scarce and that you need to act now or possibly miss out on the opportunity. In aesthetics, people will say such statements that the doctor is extremely busy and if you don't book today that you may not be able to see the doctor for weeks. You should realize though that you are risking the sale, people have been exposed over and over to these types of tactics and may walk away if they do not perceive scarcity or feel the doctor is so special that they may miss out by going to someone else.

Power of investment means that by investing the patient's time upfront then they will have more reason to follow through with the treatments. This could involve viewing before/after photos, reading informational statements, bogging them down with literature, or beginning a preliminary treatment. By having the patient invest their time rather than just their monies towards a procedure they will most likely finish all of the prescribed procedures.

Sometimes knowing you can't negotiate on price you can include "value-added" types of services or amenities to the equation where the patient feels they are getting more for less. This may involve microdermabrasion, *nutriceuticals*, or other types of give-away where the patient feels they are special.

We all know what compromising is but as it relates to your consultation it deals with price or possibly other additional procedures. If the physician allows you to discount or negotiate other than established pricing you must ask for something in return from the patient. The "if-then" applies when you have compromised on price and therefore you can ask them that if they can start immediately or soon then we can go ahead with the procedures. If-then can also be where if we go ahead with the procedures then can you put down a deposit today. Compromising works both ways so depending upon the extent it is appropriate to get something back in return.

Selling your services at retail

There are two concepts to discuss for selling retail from a services level and be able to demand the right pricing for your time and services. As long as you are not too high on your pricing there is no reason to be the lowest price for your services, if you are so concerned that other practices are charging less than you are then you are missing the bigger picture. Your competition is not the plastic surgeon down the street or the practice that is selling Botox at \$1.00/unit less but rather the other practices that show up on the natural or pay-per-click Google searches for keywords relating to the services you offer. Realize that you will never get 100% market share for any service even if you are the best, but also realize that there is a market to tap into and grow your practice.

The business concept is simple, educate your potential clients and customers in the services they are looking to have done. This is achieved by educating your staff, creating educational materials, and educating patients. Education can be in the form of mini open houses, newsletters, phone training (*exceptional receptionist*), and through the on-line and printed brochures that patients can receive. Your website going forward is especially important since it is most likely the first exposure a potential patient will have to your practice and is an opportunity to educate the consumer and create a need or want. If you have created the want then that person will telephone your practice with additional questions. Being able to control and extend the conversation now will allow the patient to again be educated on the

procedures and create a greater desire/want for the services you offer. Never answer directly such questions as “*How much for this type of procedure?*” but rather a chance to educate them on such procedures and make them comfortable that they want your services indifferent to the price. What will help you differentiate yourself from others is that now you are the teacher.

However, if the sales process boils down to whether you will match someone else’s price concerning your services you need to make that determination of whether you want the business or not. This is something that will have to be learned through experience and in making mistakes or experiencing lost opportunities. Remember, patients that barter on the price of services are more likely to be a “*problem patient*” or “*disgruntled patient*” since they are more likely to complain.

Selling Retail Products

We have talked about cross selling of services but the greatest upside for cross selling is that of retail products you can offer. If you are incorporating such services of weight loss, acne, skin care, or just incorporating aesthetics into your medical practice it is essential that you take advantage of the opportunity of selling retail products within your space. It is probably the easiest sale that you will be making because the demand for these products is consistent with the need that they have for your services. Typical revenues from incorporating retail products within your practice or stand-alone aesthetics practice should be around \$10-\$15k per month or more.

So how does this work? Let’s examine the various procedures you may be considering to incorporate into your practice. Physician Weight Loss not only allows you to incorporate medicines (ie hCG) into package prices for programs but there are opportunities to also sell nutritional supplements. Maintenance packages after the initial weight loss for the patient usually include *nutriceuticals* and protein supplements to help the patient comply after the program and to maintain this new weight over a period of time. Remember (2) of (3) patients are either overweight or obese so the potential market is very high and the traffic generated to your practice will help you cross sell other aesthetic services to them.

If you decide to offer acne treatments to your aesthetic practice then it will be necessary to offer at-home treatments whether being topical *retinoids*, skin care regimens, portable blue lights, or *clarisonic* devices. Combination treatments such as using a cosmeceutical product will enhance the procedures you are giving as well as allowing the patient to be more involved in the outcome.

Aesthetics deals with skin care and cosmeceuticals play an important role in again enhancing their treatments and to create a better outcome. Most aesthetic patients already use an arsenal of retail products as it is natural for these persons concerned about their appearance to the point where they have tried to “*self treat*” themselves with these over-the-counter solutions. So if you are able to offer these patients better products than what they are able to receive through their retail outlets the resistance to switching to a higher grade, more effective product is low. The science behind these products is real, the use of various active ingredients is greater, and the results are clinical where the patients are able to see noticeable results and improvement in a shorter period of time.

There are many other types of retail products you could include in your aesthetic practice including prescribed vitamins (*nutriceuticals*), hormone enhancers/inhibitors, mineral makeup, or a number of other products. The most important part to remember is that you need to generate traffic for you to increase retail sales since most if not all of this type of cross selling occurs during or after the procedure being performed. Also, do not forget to use these products such as cosmeceuticals on patients that have had procedures that day. Give them a sample or use the product on the patient so they can experience the product. This is why at your local department store they offer to sample the cosmetic products because most women interested want to touch and feel the product before making their decision.

Follow up on consultations

All is not lost or forgotten when a prospective patient says no. No could mean “*not now*” and therefore it is necessary for you to stay in touch with these patients. Ask them if they can be added to your database of patients where they could be reminded or offered special pricing or be invited to special events. Realize that people’s attitude towards aesthetic procedures or perceived needs for aesthetic procedures change over time and there is a high likelihood that by staying in touch they will return when they are ready or the need arises. For those people who were noncommittal or needed time to think about the procedures discussed it is important to follow up with a telephone call at a later date. It is also beneficial to send a “*thank you*” card to these people similar to what people do when interviewing for an employment position. When calling be careful when leaving a message as you may want to entice that person to call back by saying “*I wanted to touch base with you as to whether you have made a decision but I also have some important information concerning the procedure that was left out or wasn’t explained properly*”. This may entice the prospective patient to call back and speak with you and again give you another chance to make a lasting impression.

Don’t forget to ask for referrals

Your practice at the beginning is going to prosper due to your present patient base or from new customers. It is assumed that they will have a very good experience and realize the benefits of the services and procedures performed. Why then would you not consider or recognize the importance of these same clients/patients referring to friends and acquaintances what you can do for them? The term “*word of mouth*” is used frequently as a means to grow sales, your patients are “*walking billboards*” for the work that you do so it makes sense to either incentive your present client/patient or the referral that they may turn on to your practice.

There are a couple ways of accomplishing referrals. The first method is to create incentives to a prospective patient that your present patient refers. This can be done by a “*give-away*” to the new prospective patient in the form of a VIP Card, Free Offer, or by Discounted Services. Typically, an invitation type of brochure is used with a “*credit card*” looking attachment that the prospective client can put in their wallet or hold on to. Not everyone is ready to have aesthetic procedures performed for whatever purpose (*money, time etc.*) so to give them something tangible will remind them of their interest. If they take the card then there is an interest in the services you offer, the brochure portion (*invitation*) gives the new client additional information to make their decision and to educate them on the aesthetic services you offer.

The second way of creating referrals is to incentive your present patient directly which to some have meaning but many people who can afford these procedures really are not looking to go out of their way for some type of incentive or discounted service. There are exceptions but typically these are going to be the same people who would refer your services whether they be compensated or not.

Other drawbacks to this type of incentive based referral is that you may be putting your patient in an awkward position where they are almost selling for you. The idea of creating something tangible (ie VIP Card) and incentive the user of that card to come see you makes much more sense and will create greater results and preserve your professional image.

Also remember that there are many other types of referrals other than referrals from your present patients. Depending upon the types of services you provide there are possibilities to have referrals generated by other physicians or sometimes even other aesthetic practices. For example, most family practices do not treat weight loss or moderate to severe acne. Weight loss is the largest of all aesthetic services and acne services is the second largest. If you are incorporating these services into a present practice then these referrals can be accomplished by writing the right type of letter to other physicians in the area. The point is that you may not become rich treating acne or weight loss but these types of patients typically are very good candidates for more traditional aesthetic services which is the point of cross-selling. You do not wish to grow your practice at another's doctor expense so the way you word the letter is very important to get a good response.

Other referrals happen from other types of associations with various organizations, groups, and businesses. Other health spas that maybe don't offer the same procedures, day spas, beauty salons, wedding planners, or other types of businesses that could refer which is another good reason to create a VIP card. Finally, don't be adverse to joining chamber of commerce or other types of business associations within your area – networking also works well and leads to many more opportunities than you might imagine.

You can't do it alone

Regardless of what you might think, it is impossible for one person alone to create the synergy and systems that go along with an aesthetics practice. The cliché “*team approach*” to running a business is important to understand and accept. Everyone is responsible for the wellbeing of your aesthetic practice and everyone is important. Equally important is to delegate and define specific goals, job functions, and responsibilities so all parts of the practice work together. Patients sense when the office is in disarray and employees become frustrated when they are over-managed or their good ideas are not heard. Make sure everyone is involved in the success of your practice and don't feel uneasy when you do not have all the answers.

Do not be afraid to use resources outside of your practice to promote your practice. Adhengo Institute at Open Christian University has seminars on “*Your Aesthetic Practice*” as well as a number of other classes that can save you monies on purchases of equipment, various cosmetic procedures, and other in-demand services. Don't be afraid asking for advice whether through outside professionals or from your own staff. You might be presently surprised as to how well they know your business and are willing to help you in your goals.

Think Big! – Start Small

With starting any aesthetic practice or business there is a tendency of wanting to compete with other established practices as to what they have. The truth is it is more important to compete on services offered rather than equipment. There are many ways to “*skin a cat*” and correct various aesthetic corrections without lasers (*ie medical grade chemical peels are the gold standard for Dermatologists in correcting facial pigmentation etc.*) or other expensive equipment. A successful weight loss program does not require expensive scales or exercise equipment and the latest in lasers are not necessarily better than that of lasers manufactured (2-4) years ago. Don’t allow yourself to get into the mind-set that you have to be all things to all people but rather allow yourselves to be able to treat as many types of aesthetic conditions within your practice that will benefit the majority of the people.

The pitfall that many physicians have experienced is that they overextend themselves financially or in creating a “*taj mahal*”. The truth is your facility needs to be functional and clinical in respect to these aesthetic services and not imitate necessarily a day spa. Since you are receiving this manual as part of your web site development concentrate on where most of your leads, telephone calls, and consults are going to originate – *the internet*. In the past location, signage, technology, and guerrilla marketing were the norm but as the market has developed so has the type of patient has changed. Yes, there are still those high income individuals seeking treatments but for the majority of patients they are “*middle class*”, “two income” families that either wish to maintain their appearance or wish to change something about themselves. First impressions are still very important to them but also professionalism, patient care, and creating a trusting relationship with you and your staff. Though there are those potential customers that care more about the image of where they have these procedures performed but they are not the norm. The majority of patients care more about the procedures they are going to have than materialistic concerns.

Therefore it will be of utmost importance that you define your services, educate and train your staff, and promote the services that will ensure your financial success. Once achieved you will then be able to grow and expand your business through profits and not necessary by taking on greater risk.

Take care of your most valuable asset: your employees

Your front office is integral to the success of your new aesthetic practice. It is important to make sure that they are taken care as well as the prospective patient. You need to create an environment that will stimulate your staff to enjoy and be enthusiastic in making your new practice a success. Your staff will need to be compensated financially for your successes which will help incentive them to ensure that you will be portrayed properly to prospective clients and take on the added responsibilities needed from everyone involved to ensure success. Turnover of employees are inevitable but having too many new faces cause relationships to sour or lost and in many cases is a step backwards.

Conclusion

Your front office holds the key to tens of thousands of dollars of revenue and in turn profits to your practice. It is most important to create a staff that understands the concepts of selling but also that of professionalism and with the right attitude.

Always remember that aesthetics is a business, the only similarity between your aesthetic practice and a medical practice is the look and possibly the personnel if you are incorporating aesthetics into your facility. The similarities end and you cannot run your new aesthetic practice as you have your medical practice. Customer service, follow-up, marketing of services, selling of services, and the whole sales process and positive experience to patients make this a dynamic ever evolving business. There are short-term strategies and long-term strategies that have to be implemented as well as all the other issues there are in running a business from a business perspective.



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