

The Art of Getting Patient Referrals

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The most successful practitioners I know are the ones who have ongoing referral relationships with several other health professionals. While many practice-management seminars teach you all about getting referrals from patients (and that's a good thing), you will do even better setting up referral relationships with doctors. The following are suggestions I have accumulated from 28 years in practice using this system.

When it comes to acupuncture, most doctors have heard of it, know next to nothing about it, yet they get asked about it an average of five times a day. Common beliefs are that acupuncture is for pain relief and little else; there is no "down side" to it; and they don't know how it works. To achieve success in referring, you've got some specific educational challenges to overcome.

If you remember nothing else from reading this article, remember this: It's all about affinity. Basically, when you meet another health professional, if you like each other, it all flows from there. It will matter very little what school you went to, what degrees you have, what techniques you learned, years you've been in practice, your gender, race, etc. What will matter most is the "likeability" factor. Chances are, since you went into a profession dealing with people, you like people and they like you, so you're at least halfway there already.

How to Meet Referring Professionals

Almost always, this works by word of mouth. It almost never works by cold calling or walking into a doctor's office unannounced. The front staff is very protective of their doctors against salespeople and other unsolicited entries into the office (that would be you).

First, get a vision of what type of practice you want to establish. For example, if you want to see a lot of back pain patients, think of spine specialists: orthopedic surgeons specializing in the spine, neurosurgeons, physical medicine and rehabilitation are just a few. If you know any medical doctors, even if they are a proctologist or gynecologist, ask them if they can recommend a spine specialist with whom you can establish a referral relationship. They probably know of one or went to school with one. Ask if you can use their name. If they agree, when you call the spine specialist's office, you ask to speak to the doctor and inform the staff member that "Dr. Jones sent me." Chances are you will get put through. If Dr. Jones has a good relationship with the specialist, your affinity index goes up. Try to set up a meeting, even if it's brief.

If you don't know any doc, join a local chamber of commerce, a referral group such as Le Tip (www.letip.com) or other community group. See if you can meet someone that way.

It's very important for you to be choosy here. Just like other relationships, you don't want to work with a "bottom feeder." You want someone ethical, compassionate and somewhat open-minded with whom to work and grow. One way or another, we become guilty by association, so associate with someone great. You'll be better off for the relationship. If it doesn't feel right, move on - just like dating.

Be prepared for some rejection and remember, there are a lot of doctors and only one of you. The goal is to achieve affinity. Also, never bribe a doctor. Don't buy them bottles of wine, send them tickets to games, offer them commissions, etc. While this might be well-meaning on your part, most states consider this illegal and will get both of you in trouble.

Have Your Ducks in a Row

When you first meet the doctor, you'll obviously want to dress in a professional manner. Bring your business cards, although that won't be a big deal and might even largely go unnoticed. What will get their attention is for you to create and bring referral pads. This usually is done on 5 x 8, light-colored pastel paper (dark colors don't fax well). Have about 25 to 50 referral sheets on a gummed pad, and bring two or three pads. They should have your clinic name, address, phone numbers and some basic referral information. The basic info should include the number of times a week to see you, the doctor's diagnosis, special instructions, etc. Take a look at some physical therapy pads to get an idea.

Also, have a map to your office on the back. Doctors are very used to these, and, unlike your business cards, the pads will get placed on top of their desk alongside MRI, lab, PT and other referral pads. It's a great tool and very inexpensive to make. The doctor will like this a lot, and the more "likes" you can create on that first meeting, the better.

When you meet, don't start convincing them about acupuncture. They probably won't want to know theories and research. Save your NIH studies for your patients. What they will want to know is when it's appropriate to refer to you. You don't want to sound desperate by saying "anybody and everybody." Have a few "for instances" ready, such as "right after surgery," "six weeks prior to surgery" or other appropriate scenarios you're comfortable treating.

Second, get your documentation set up. Once you get a new patient, it's good form to send your first report to them along with a brief thank you letter. Your first-visit report will serve as your initial documentation for your notes; an informative letter to the referring doctor is invaluable for any insurance or utilization review. Send a brief report just before the patient will be re-evaluated by the referring doctor. This way, they will have your report in front of them before they see the patient - very helpful. Your report should state their symptom picture, your objective measurements, their status and your recommendation for more acupuncture or discharge from your care. Simple and brief is best.

Third, be nice to the staff. They often will send you more patients than the doctor will. Also, if it isn't too much trouble, when the patient comes up to the front desk of the referring doctor carrying your referral page, have them fax it to you so you'll know you have a new patient coming.

Do No Harm

Once you have the affinity going, here are some basics I recommend you observe. First, remember the referring doctor trusts you with the care of their patient. When the patient goes back to that doctor and they had a negative experience with you, chances are the referring doctor will hear some comments from the patient, such as "Why did you send me there?" On the other hand, if you did a good job, they will be very complimentary, saying things like "Wow. That was great! Thanks for referring me to the acupuncturist." Obviously, the more of the latter, the more referrals you can expect.

Don't feel pressure to make someone better. The first tenet of Aesculapius said "First, do no harm." Whatever happens, if you can't get them better, don't make them worse. Usually, this happens

when healers become too aggressive.

What if they do get worse? It's far, far better for you to call the referring doctor and let them know before the patient calls them. This way, the doctor has some time to prepare. It's not a fun phone call to make, but it's better to be pre-emptive than wait. Chances are the doctor has been in that position themselves and will appreciate the "heads up" from you.

Also, if you receive a diagnosis of "low back pain," be careful what you tell the patient. If you tell them they have a " *yin*-deficient kidney," you might be correct from a TCM standpoint but the patient will sometimes go back to the doctor and say, "It wasn't my back at all - it was my kidneys!" Make sure your patient understands the difference.

Referrals Are a Two-Way Highway

Finally, remember the other main reason you're establishing referral networks is for patient safety. If you see someone in your practice from whom you want an expert opinion, you will have a network of these expert doctors to whom you can refer your patients for consults, ordering tests, etc. It's a much greater service for your patients and a much safer way for you to practice. Your knowledge will be greatly enhanced, as will your standing in the health care community.

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