Auditdata

5 Steps To **Activate Your Existing Client Database**

Introduction

While targeting new clients and opening new clinics is a reliable way to grow your business, you should never forget the patients you have already fitted. Having too much focus on new and not enough on existing patients can damage your growth and keep your acquisition costs unnecessarily high. Your existing client database should be responsible for a percentage of your revenue every year.

A rule of thumb is that if less than **30% of your revenue** stems from your existing patients, you are missing opportunities.

Client retention is the most important investment any hearing clinic can make. That is because a cost of acquiring new clients is five times higher than that of maintaining an existing patient. Moreover, if you have been careful to manage your patients' experiences, the average conversion rate of existing patients after four years can be as high as 90%.

According to the research undertaken by Frederick Reichheld of Bain and Company, increasing client retention rates by 5% increases profits by 25% from 70% to 95% (1).

However, just because a client has purchased from you once does not mean that they will buy from you again. You should never see the original purchase as the endpoint in the sales cycle. Once you have gone to the trouble (and the cost) of gaining a new patient, you will desire to hold them for life. You should always see your patients as prospects and you should treat them that way.

References

1. H.B.R., The Value of Keeping the Right Customers, Amy Gallo: **https://hbr.org/2014/10/the-value-of-keeping-the-right-customers**

Five Steps To Grow Your Business Using Campaigns Targeting Loyal Patients

Hearing aid users typically buy a new hearing instrument every four to seven years (2). Investing and activating your client database is a very efficient way of getting more out of your budget. This can help shorten the cycle and enhance your patients' decision to choose your clinic the next time they buy a hearing aid. Moreover, it can help with accessories sales and even attract new patients to your hearing clinic if current patients start referring relatives.

This guide will focus primarily on the tools and processes you need for campaigns to enhance repurchases from existing patients.

References

2. Oticon, How do I know it's time to update my hearing aids?: **https://www.oticon.com/your-hearing/getting-help/how-do-i-know-when-it-is-time-to-update-my-hearing-aids**

Step 1

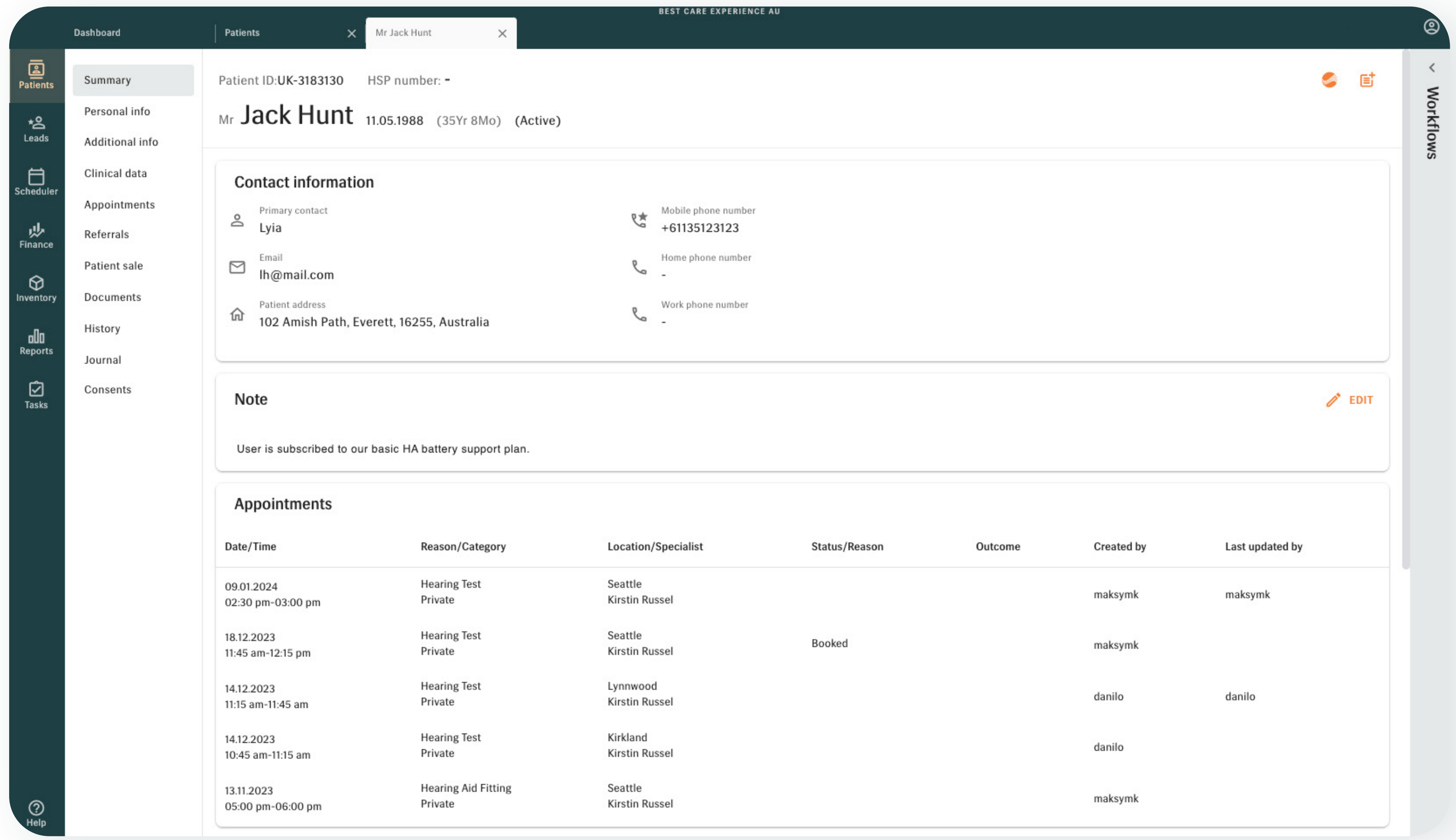
Segmenting Your **Target Audience**

In any marketing campaign, relevance is critical; you should always understand that what is relevant to one of your patients might not apply to others. Real relevance to any patient depends on the timing and the content of the messages you send.

Simple mass communication with low relevance and no personalization will not just deliver low return-on-investment; it may even be a source of irritation for your patients. Segmentation and understanding of your existing patients is key to everything that follows. You likely have much information which can help you create timely, relevant, and personalized messages. Remember, the most important thing is the patient data recorded; the 'Garbage In, Garbage Out' is a truism.

Segmentation will enable you to decide which patients to contact and when to do so. It can also assist you in the decision of which offers would be most relevant to each group.

Deliver consistent, high-quality care to your patients every time. With Manage's guided workflows, clinics can streamline clinical operations with one-click access to all functions. Find what works, customize workflows to suit your practice needs, and scale and standardize appointments across locations.



If you run a multi-outlet hearing practice, it will be necessary to segment by branch and location. Doing so allows you to understand which outlet is the most suitable for your patients; it also helps you to look at broader schedules to ensure each clinic location can accommodate patients within the next few working days.

Segment Your Existing Patients By:

1. Patient type and status

Knowing the most appropriate group for each and what their status is, can be important information for your reports and outreach. It is good to know if your patient is for example a veteran, a senior or a student. You also have to know if the patient is still active or transferred to a different clinic.

2. Year/date of last purchase

This allows you to identify patients that purchased a hearing aid between four and six years ago as well as prioritize a list by choosing the older purchases first.

3. End-user price point

Understanding what patients have purchased before allows you to differentiate any offers by price point as well as prioritize your communications.

4. Hearing aid form factor and model type

Understanding which form factor patients wear may help with personalization and relevance.

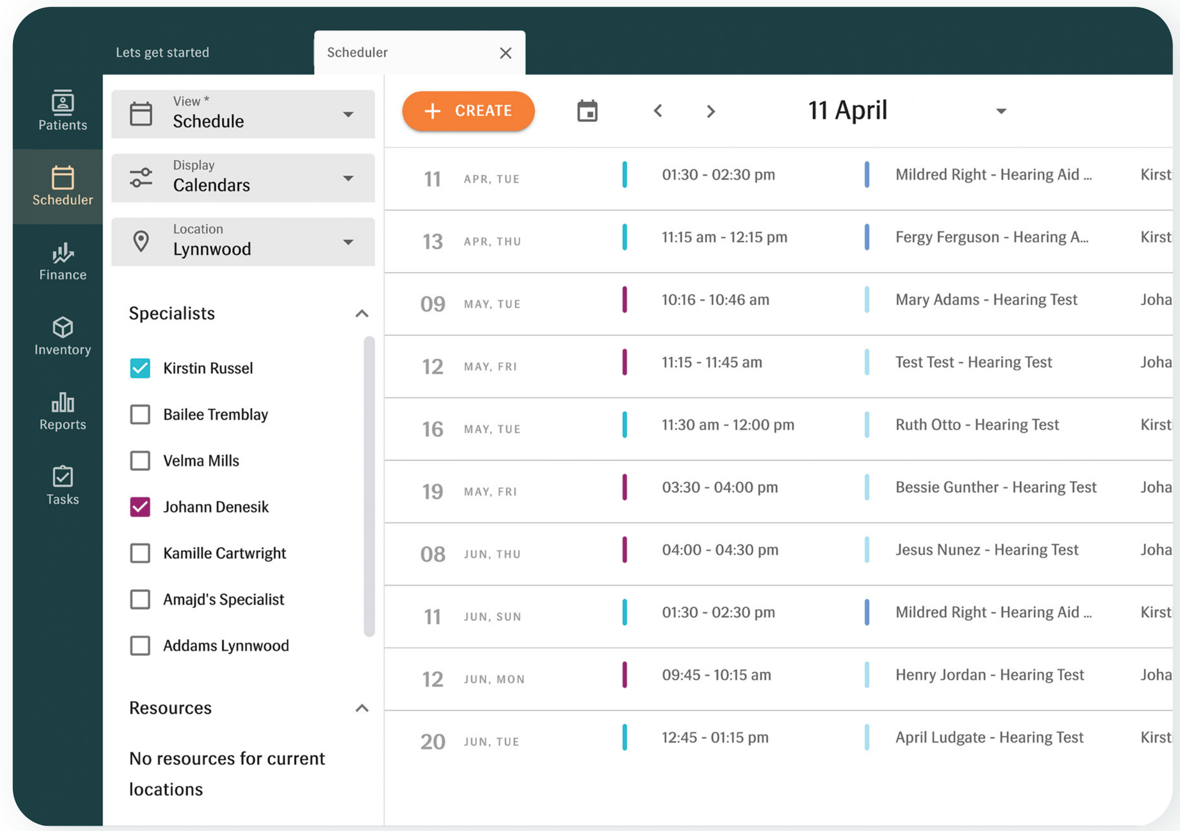
5. Latest test date and repair data

Understanding the data can help you form a solid call to action for each patient. If their latest test date was a couple of years ago, you could invite them for a re-evaluation.

6. Other data

There are plenty of other data points that may assist you in segmentation. Hearing aid repair and additional information, such as hobbies and lifestyle needs, can all help with deeper segmentation.

With **Auditdata Manage**, you will get a full overview of your schedule to provide you with more patient-facing hours for your staff. Our Practice Management System (PMS) offers a next-gen scheduler that will guide you through optimizing the way of utilizing your employees, locations, facilities, and equipment.



Category Information

Category information can be compelling when used correctly. For instance, you could add a searchable field that allows you to enter information as a category, such as interested in new Bluetooth hearing aids, has a smartphone or rechargeable devices. While a patient may not have been ready to buy when they discuss types of technology with you, recording their interest will allow you to shape relevant or personal offers in the future.

Once you have segmented your patients, you will have various target groups for your communications. You should also have clear ideas about what offers or call to action you can use to be most relevant to the different groups.

Who Should You Start With?

While deep segmentation helps you prioritize your communications, we suggest the following parameters for your first repurchasing campaign:

- Patients whose hearing aids are more than four, but less than seven years old (ready).
- Patients visiting your shop often (loyal).
- Patients who purchased higher price points (purchasing power).
- Patients whom you know will benefit from new features or technology (relevant offer).
- Patients whom you know are interested in new technologies.
- Patients that have not had a hearing test in two years or more.

When you have conducted a campaign towards these segments, you can work through the rest of your priority list. You can also target other groups you have identified, such as those who purchased more than seven years ago. Regular querying your database will deliver more opportunities for your business. It will also allow better planning of campaigns moving forward.

Step 2

What Will You Offer **To Your Patients?**

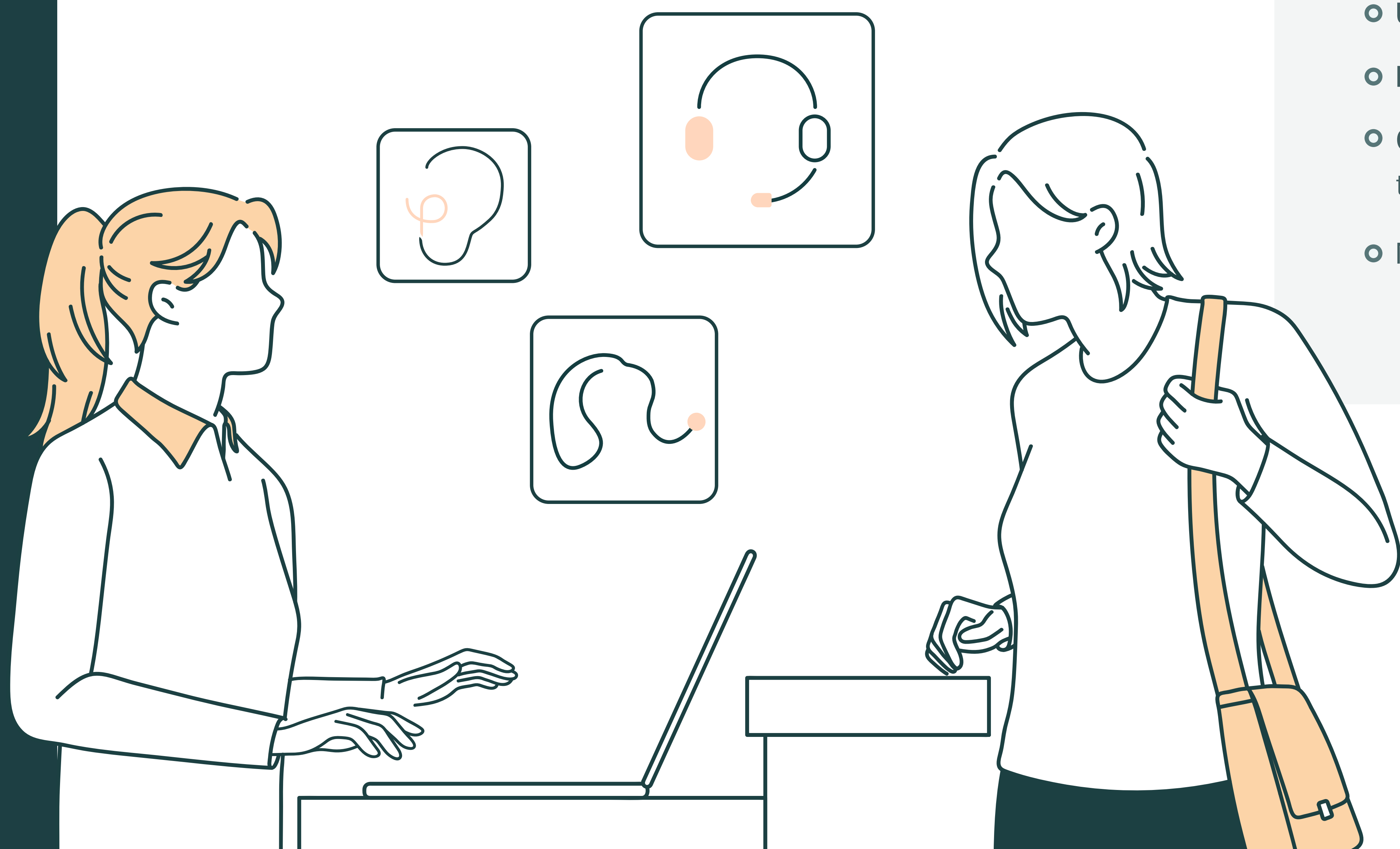
Offerings To Keep Your Patients Loyal

There is a broader way to use your segmentation to design a very different call to action that makes sense for your patients. You should consider how other tactics, like regular newsletters and lunch and learn or focus group events may allow you to activate your database, retain your patients, and nudge some people towards a shorter buying cycle.

It is crucial to ensure that you follow local data protection laws by collecting patients' consent to be contacted at their first visit and your front-desk staff checks at every visit that the approvals are correctly recorded in your Practice Management System (PMS).

Other Offerings You Can Consider To Drive Loyalty And Retention:

- Annual check-ups on hearing and device
- Loan set upon repair (testing newest tech)
- Remote care
- Discount on associated products
- Discount on purchase of next hearing aid or buyback offer
- Unlimited adjustments
- Full service and free tubes, filters, domes
- Call in for a new hearing test and trial after the reimbursement period is over
- New product releases



Designing An Offer With a Clear Call To Action

With both relevance and personalization in mind, it makes sense to tailor several offers. You should consider three to five different offers you believe will be attractive for the patient segments you are targeting. You could also consider two-part campaigns. The initial purpose of your campaign is to reactivate the interest of your patient database. Your goal is to get your patients to schedule an appointment and, more importantly, show up.

With that in mind, a two-part offer may be the best way forward. For instance, the campaign may first offer a free check-up of hearing aids or a new hearing test. The second offer during their appointment could be a free trial of a new generation of hearing aids.

For each patient segment you plan to contact, you should decide what to offer to create a clear call to action. That could be both by providing the patient them with a service or a more tangible incentive.

Some Of The Time-Tested Offers Used Are:

- Time for a hearing test
- Free check of the patient's current hearing aids - and have the patient try a new generation of hearing aids during the period of service
- Test or trial of a new generation of hearing aids
- Buyback offer of current hearing aids
- Trial of accessories

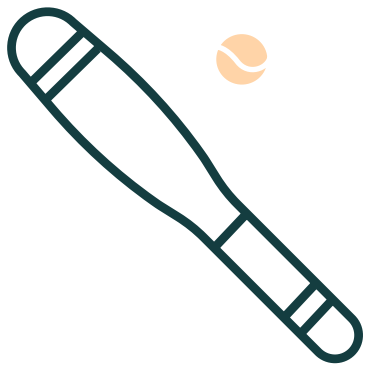
If you have been careful with collecting your data within your Practice Management System (PMS),, you can focus on much deeper relevance. That is where good data hygiene offers powerful benefits and personalization of an offer which can increase your campaign's power.

Personalizing Your Offer

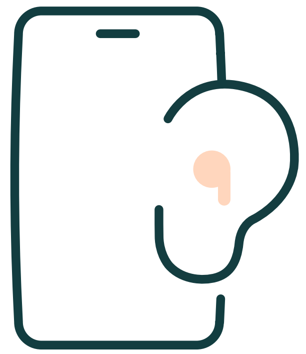
The most straightforward form of personalization in marketing is using the name of the prospect. However, the deeper the personalization is, the more relevant the offer will be. When you have completed your patients' segmentation, the challenge (and opportunity) is to effectively use the information you have about each of them to select the right offer.

That step is more straightforward if you have used categories, recorded personal data, or know something unique about them, such as:

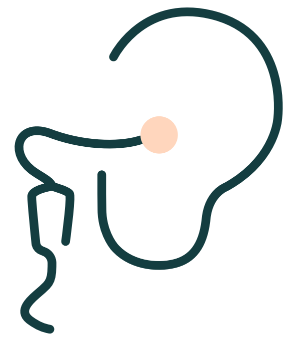
They are interested in music.



They like outdoor activities.



They are fans of new technologies, i.e. hands-free calls.



They are interested in "In the Ear" devices, and a suitable solution has become available.

They wear high technology devices, and a new device or meaningful accessory has become available.

Whatever the information is, try to work it into your personalized offer. The personalization of a campaign offer delivers relevance for the client; it also increases the patient's chances of better engaging with the offer. If you do so, your return on investment will be much more substantial.

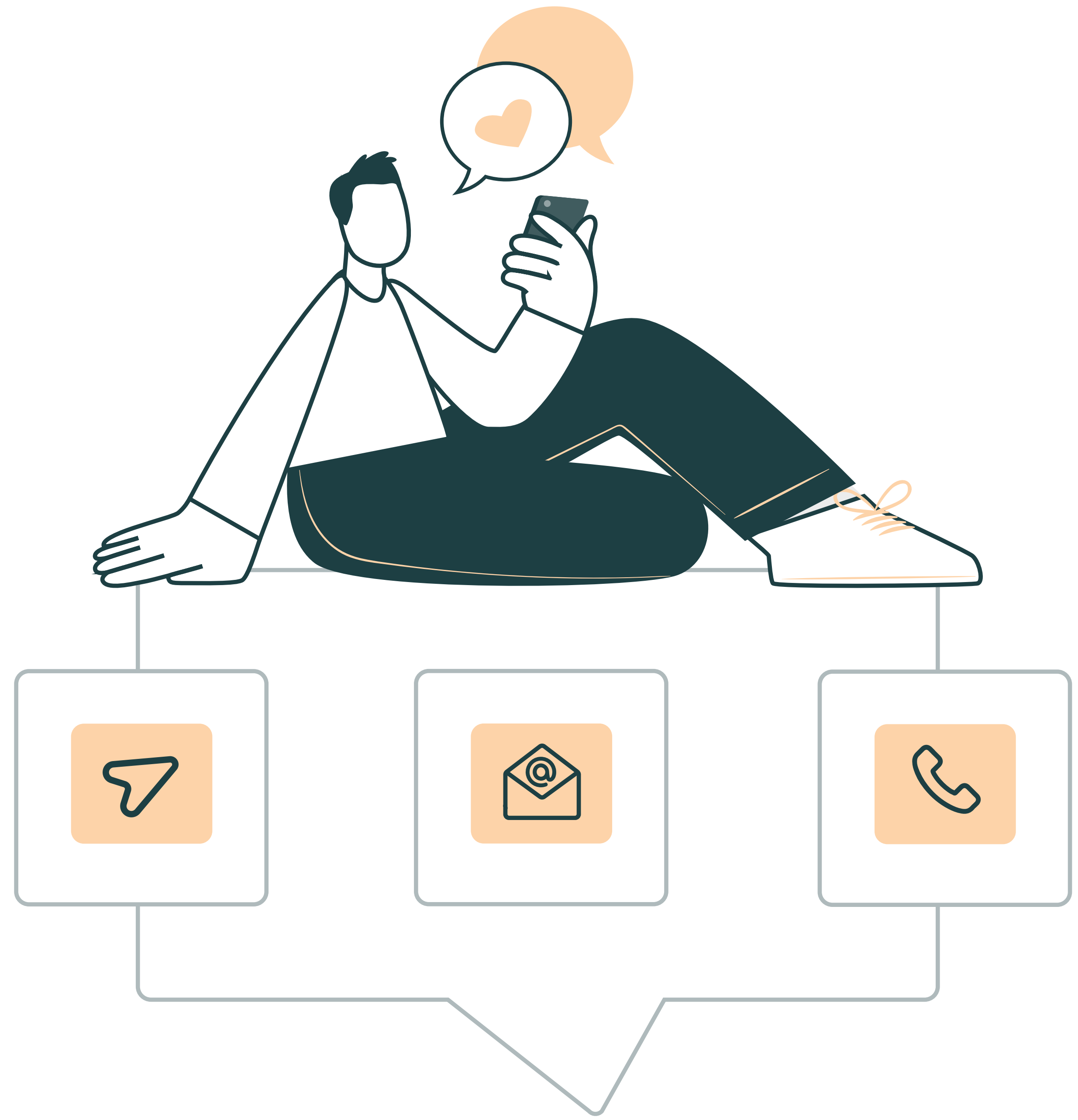
Step 3

Managing Your **Communication Channels**

You now know who to target and what to offer. The next step is to decide which communication channel to use to contact your patients. Effective channels are e-mail, direct mail, or a phone-call campaign.

No matter which channel you choose, a correct segmentation, followed by strong personalization, will consistently deliver the most substantial investment return. You will have to adapt the following stages to facilitate your chosen channel.

For instance, if you have decided on email, your next step is designing emails for each prospect and ensuring that you use an email system with tracking options to monitor opens and responses. You could then plan to follow up opens that have not responded with a second email later or even a phone call.



Consistent Communication

Before we move forward, it is worthwhile to discuss a strategy of consistent communication. Staying in touch with your patients is key to success. For instance, patients who have purchased within the last two years may have a genuine interest in accessory devices for their hearing aids. The next few pages will cover:

- Building a hearing related community
- Rewarding your loyal patients

Read more about communication chanels in our **Marketing Guide for Hearing Care Professionals**

Building a Hearing Related Community

1. Send out newsletter. You can use regular newsletters to disseminate information that your patients will find valuable, discuss new products, and keep patients up to date with news about your hearing practice. Work hard to foster a feeling of belonging, a sense of community.

2. Foster a community. Consider inviting some patients to participatein a focus group. The group could look at new technologies or new business practices and give their feedback. This builds a sense of community, and many people want to belong to a community. A community centered around your clinic can be a good and useful thing.

3. Host events. You could hold lunch and learn events talking about the latest technology changes or the changing face of hearing loss treatment. You could also consider cleaning days, an educational event where you invite your patients to go over top cleaning tips and instructions. Events like these are non-threatening and can also build that sense of community around your business.

4. Invite friends and family. Consider using coffee mornings to welcome your patients and allow them to form a wider community. You could use such coffee mornings for patients to bring their friends and family; maybe there could be opportunities to add new patients. You could arrange a picnic during summer months or another seasonal based event. Those events would offer a fun and engaging way to reinforce a genuine connection with your patients.

Rewarding Your Loyal Clients

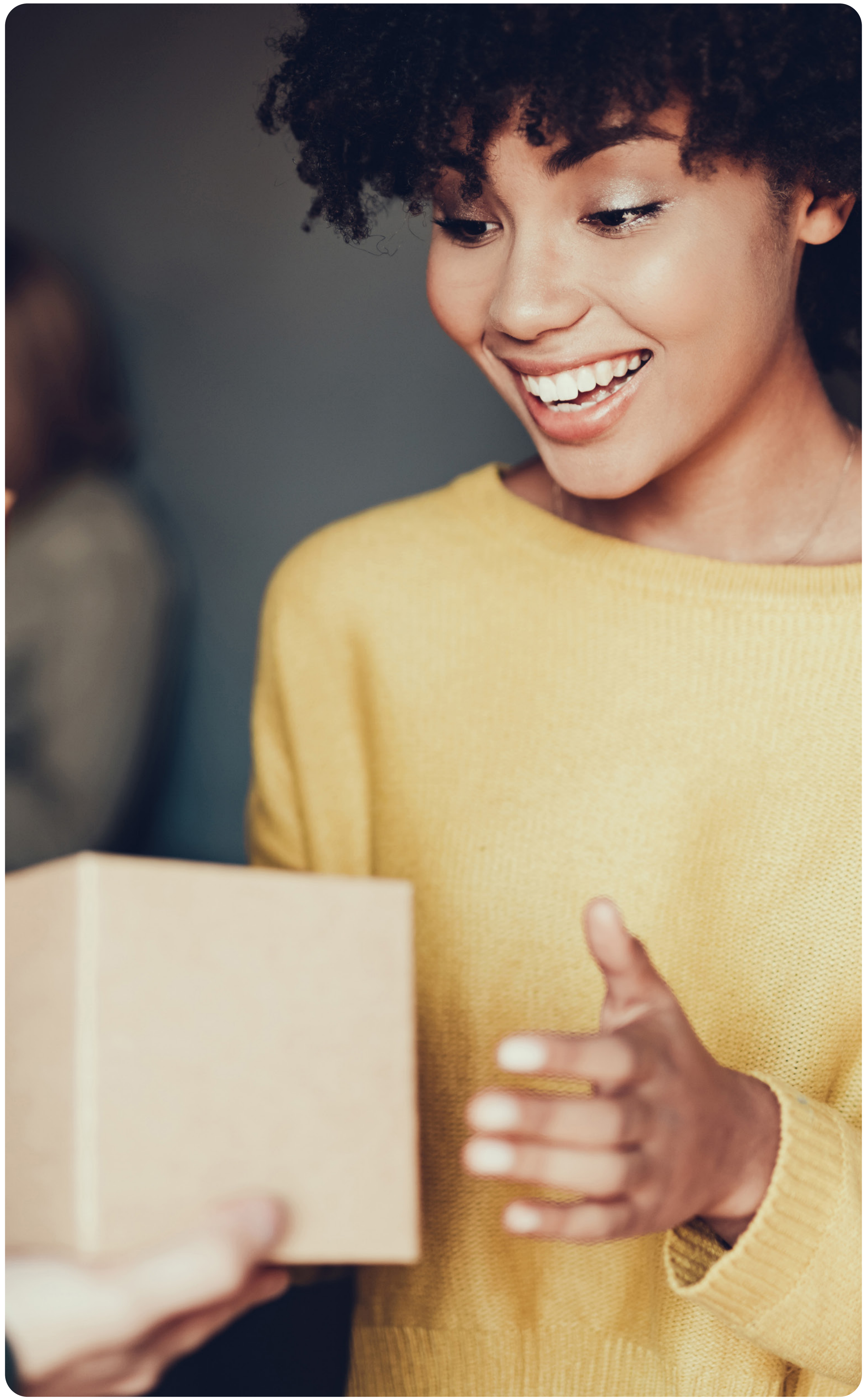
There may be some patients who deserve special treatment and you can identify those patients that have been the most supportive of your business. That could be patients who have been referring other patients to you or whom you know are good ambassadors for your clinic.

You can base the best rewards on the deeper information you know about them. Consider things, like theater or opera tickets, perhaps vouchers for their favorite restaurant or send a bouquet of flowers. Those rewards have real value for the patient. They also offer you the opportunity to introduce the element of surprise to your relationship.

Wonder evokes emotion, in this case, a strong feeling that will be good for the long-term relationship and your clinic. Do not make prizes too large as patients might ask themselves how much money you earn from them.

You could also offer rewards that have nominal monetary value to you but maybe highly valued by the patient. Special hours, no charge service on minor repairs, extended payment plans and trials on new products should cost you little, but the patient will likely see them as hugely valuable.

Next, we will discuss using these tips in a phone campaign. Each step undertaken would be similar if you were going to use any other channel to reach patients.



Designing Your Phone Call Campaign

One of the best ways to target patients and arrange an appointment is by calling them on the phone. A US benchmark showed that they reached about **50%** of the patients they called, and at least one-third of these booked an appointment.

The first thing you need to do is to identify who will make the calls. There are outside agencies set up for this purpose, and they have their benefits. However, using internal shop-staff has real benefits. It makes the calls personal as your clients know the clinic and who is calling.

The structure for each call could be:

- Whom to call and why (based on your client segmentation in step 1).
- What the critical message is.
- What to offer an individual patient (based on decisions made in step 2).

When you have identified those pertinent points, you can begin to form your phone calls scripts for each of your target list. A script allows your staff to know what a call's point is and the information it should contain. However, a script must not be so rigid that it hinders them in their goal. Designing scripts can also help you identify possible objections, and in doing so, decide on counters that could overcome those objections. Therefore, we recommend that you prepare relevant scripts foreach patient segment you are targeting in the campaign.

The Basics Of Your Phone Call Script

Each stage has its unique natural flow, and how you complete the call is based on its success. Let's take a look at each step.

Step 1. Greetings and introduction

Step 2. Schedule an appointment

Step 3. Complete a call

Step 1. Greetings And Introduction

The greetings and introduction phase should cover who the caller is and where they are calling from. The second step is to ensure that the caller is speaking to the right person. Once they have done this, the caller should ask the patient or prospect whether they have time to take a call.

Doing so is essential for two reasons: **the first** is that if the patient is time-pressured, they are not in the right frame of mind for the call. **The second** reason is psychological: asking them if they have the time for the call, you ask for a permission to take up some of their time. You are telling them that you know that their time is important, and you value them enough not to waste any of it.

Once the caller has gained the patient's permission and saved the consent types in your PMS, they can then move forward into the personalized offer for them. If the patient doesn't have time, it is best to arrange a time to call them in the future when they don't feel under pressure.

After the caller has detailed the offer, the patient will accept an appointment or deliver an objection. It would help if you tried to identify as many objections to an appointment as possible. Doing so allows you to identify strategies to overcome those objections. You can then write down the possible objections and use them during your staff training.

Possible Objections

The possible objections can range from the mundane, such as the patient isn't available to take a call, to the more pointed - they have gone elsewhere for their hearing health needs. Outlining these objections and the responses will help your staff complete the calls in the best manner possible. Your list could include the following:

- **The client isn't available**
  "Okay then, I will not take up anymore of your time, when is a good time to call back to catch you? We want to check that everything is fine with your hearing".

- **My hearing aids are fine**
  "I am really glad to hear that you feel you are doing fine, but it is worth coming in so that we can validate there are no changes in your loss and the aids are performing as they should be".

- **I can't afford more hearing aids**
  "We completely understand, but my call is actually a check-in to get an update on your hearing and arrange an appointment to ensure that your current technology is delivering all that it should be for you".

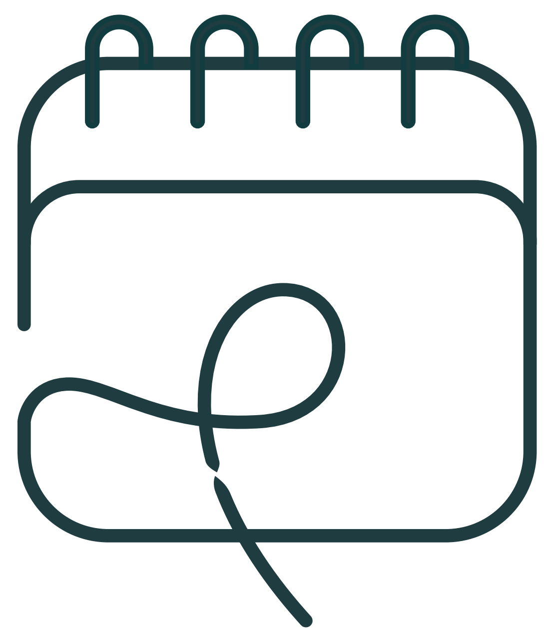
- **I hear just fine at the moment**
  "We had a gentleman/lady who thought the same, but when we checked, they had been missing out on quite a bit. It happens so gradually that they didn't even notice; they were really glad they had come in".

- **I got hearing aids elsewhere**
  "That's fine; we are happy that you did something to hear better. If we can be of any help to you in the future, don't hesitate to contact us".

Step 2. Schedule An Appointment

Always try to offer at least two appointment times to a patient; this allows them to choose the most suitable times. Alternatively, if you have detailed in your **Practice Management System** the most convenient appointment times for them, use that information. The caller could say something like, "I know that in the past, you really liked Monday morning appointments before noon because it fits in with your other appointments. Would that time still suit you?"

You are conducting two things when you do this; the first thing is allowing them to know that you have listened to them and what they have to say is important. The second thing is offering an appointment that you believe will suit them.



Step 3. Complete a Call

The completion phase can be one of two options: 1) They have booked an appointment or 2) They have refused an appointment booking. If they have accepted an appointment, the caller should confirm the appointment time and date. Tell the patient that you will send a reminder of the appointment and finally, emphasising that they are welcome to bring a significant other.

If a patient has refused an appointment and you can't overcome the objection, the caller should tell them that they are always welcome to book an appointment at any other time. Always end the call with a friendly remark, such as you look forward to seeing them again in the future. Your staff should update patient data in your patient database each time you make a call. Insert that they have been called on a specific date with a particular offer.

Make sure not to call the same person several times with the same offers, but systematize the calling lists and make new targeted segments along the way. A rule of thumb is not to make calls to the same patient more than three times per year.

Step 4

Training And Activating **Your Staff**

Not everyone is immediately comfortable or proficient at making outbound calls; it will take some training and explanation to ensure they are ready to do it.

The training should cover how you want them to prepare for the call, the simple logistics, such as a call list, familiarization with the patients, and the patient segmentation data and personalized offers. That allows them to understand the calls' objectives.

Train them on the tone you wish them to use, the scripts you have generated, the possible objections they might meet and the statements or counters you hope will overcome those objections. Finally, they will need to know how to record responses from the calls. Tell them how, where, and what to record.

Role-Plays

While many people dread role-play exercises, they have actual value. They will allow your staff to familiarize themselves with the call scripts and the possible objections. It will also enable them to practice their role.

Design different role-play exercises ranging from a relatively simple favorable response to a particularly stubborn unfavorable response with several objections. This will give your staff an authentic taste of what they may face and will enable you to guide them on what to say and how to handle the situation. You can cover different objections you have formulated during the role-play exercises and detail the various statements or counters you designed. In this way your staff becomes familiar with possible objections and develops wording for the responses that they feel comfortable with.

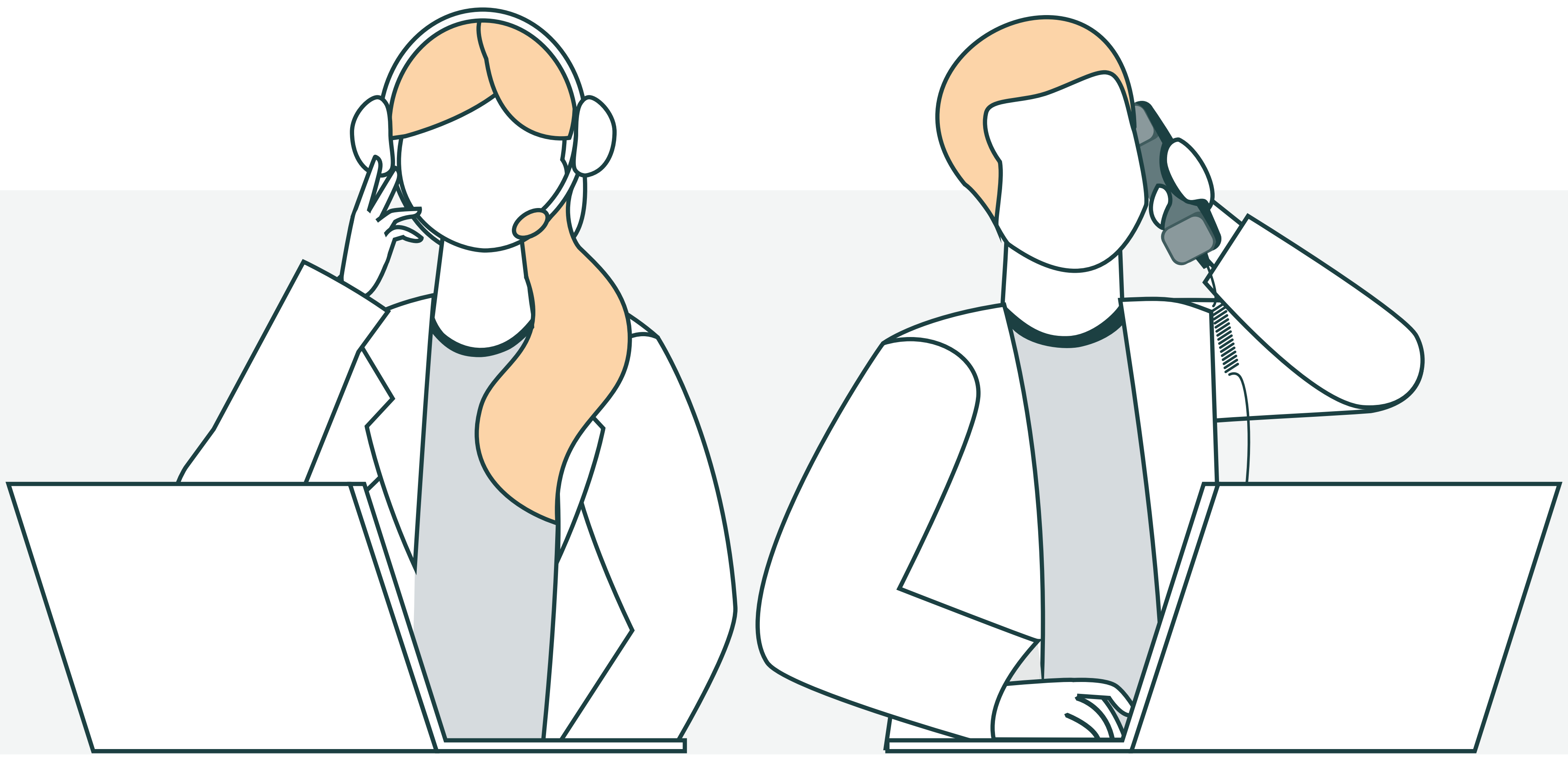
Preparing For a Call

Your staff should have an easy access to the call list and the different scripts or prompts. Before they begin a call, they should also take a little time to review your Practice Management Software's patient record. That allows them to familiarize themselves with each client and the details and objectives of the calls. Some people may not pick-up, so be prepared with a standard voicemail message. Ensure it is recorded on yourPMS and organize a follow-up call.

Making a Call

There are several things that your staff need to consider:

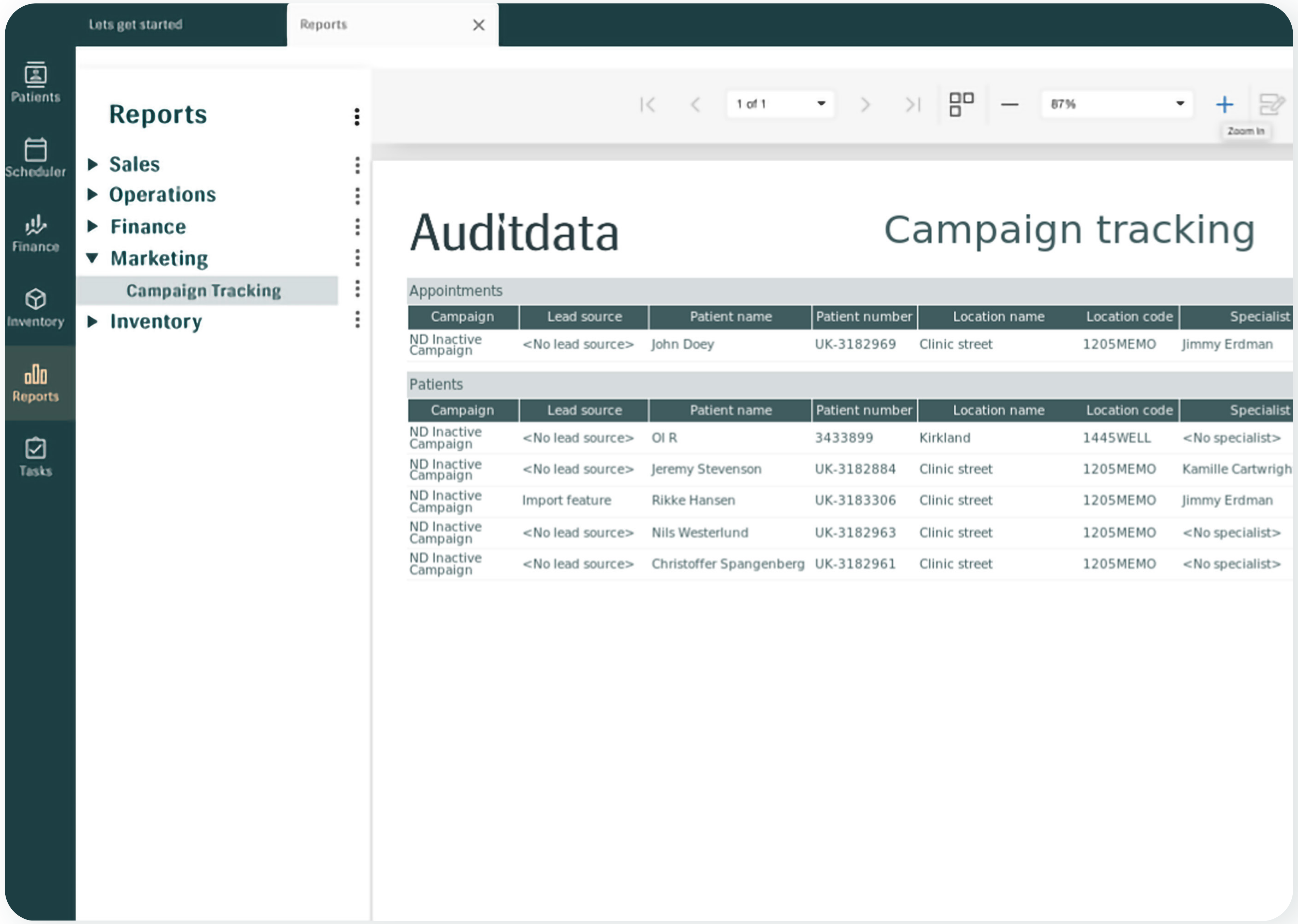
1. They must be professional in tone.
2. They must be relaxed, keeping the speed of the conversation natural, speaking clearly. Believe it or not, smiling while undertaking the phone call can help. Just as face-to-face patients can see your smile, callers can hear it over the phone. Smiling will help their tone sound friendly and helpful. It will also help your staff to relax.
3. They should address a patient by name and never talk over them.
4. They must address any questions that the patient has outside of the purpose of the call. If they can't answer those questions, they should clarify that they will promptly find out and return to them.
5. It makes sense for them to have your Practice Management Software open on the patient record during the call. That way, they can make any pertinent notes and record the outcomes of the call.
6. Finally, if the patient refuses to come in, they should inform the patient that they will follow up with them in a few months.



Tracking Data

You should train your staff on where they should record the call and what information you want them to enter to track the campaign.

Proper data capture will allow you to monitor the campaign; it also offers you the versatility to pivot to differing messages if you find that some convert better than others.



Step 5

Tracking **Your Performance**

With all of the steps undertaken, your staff should now be ready to make the calls. You can start your campaign, but remember to track the outcome of calls closely.

Monitor the outcomes against the KPIs you have chosen; it will enable your staff to assess how well they are doing and see how this initiative affects your business.

Designing The Tracking

It would help if you tracked all campaigns, no matter which channel you use. You should set your own KPIs (Key Performance Indicators) at this stage and plan how you will track them.

Tracking point 1: Conversion of calls to appointments made
Doing so will allow you to understand what messaging or offer was the best and use the most successful messaging.

Tracking point 2: Appointment compliance
When cross-referenced with messaging to be used, it will also allow you to understand the most powerful messaging.

Tracking point 3: Conversion of appointment to sale and the revenue
Both of these will allow you to understand your return on investment.

Once you have outlined your KPIs, you need to determine how the data is stored and queried. Your callers need to know how, where, and what to record so that you can easily track the campaign.

Here are the series of suggestions for KPIs that you could track:

- The number of patients called, suggested 10/day/caller – some might not pick up. Try to call them at a different time during the day
- Number of patients reached
- Number of appointments booked/patients reached
- Number of attendances per booked patients
- Number of patients purchasing/per attendance
- Generated revenue
- Average selling price per patient
- Average selling price per product
- No show percentage
- Return percentage

Optimize, If Needed

If your calls do not reach the KPI-levels you would expect, you should evaluate what you have done in each of the previous steps, one at a time. You can identify the challenges faced by your staff from the existing calls and consider how to optimize and make future calls more efficient.

Things To Consider Are:

- Are the offers attractive and relevant to the targeted patients?
- Are your callers performing as they should?
- Do callers need additional training?
- Should you try with other callers?

Ending a Campaign

In truth, if you have a sufficient database, communications campaigns should never cease. However, at the end of every campaign cycle, it is crucial to measure the campaign, learn what worked, and more importantly, what didn't. Doing so will allow you to use those learnings to build better campaigns moving forward.

While sometimes you may feel the return on investment is low, if you can take vital learnings from a campaign, it hasn't been a failure.

Practice Management Software To Complete Five Steps

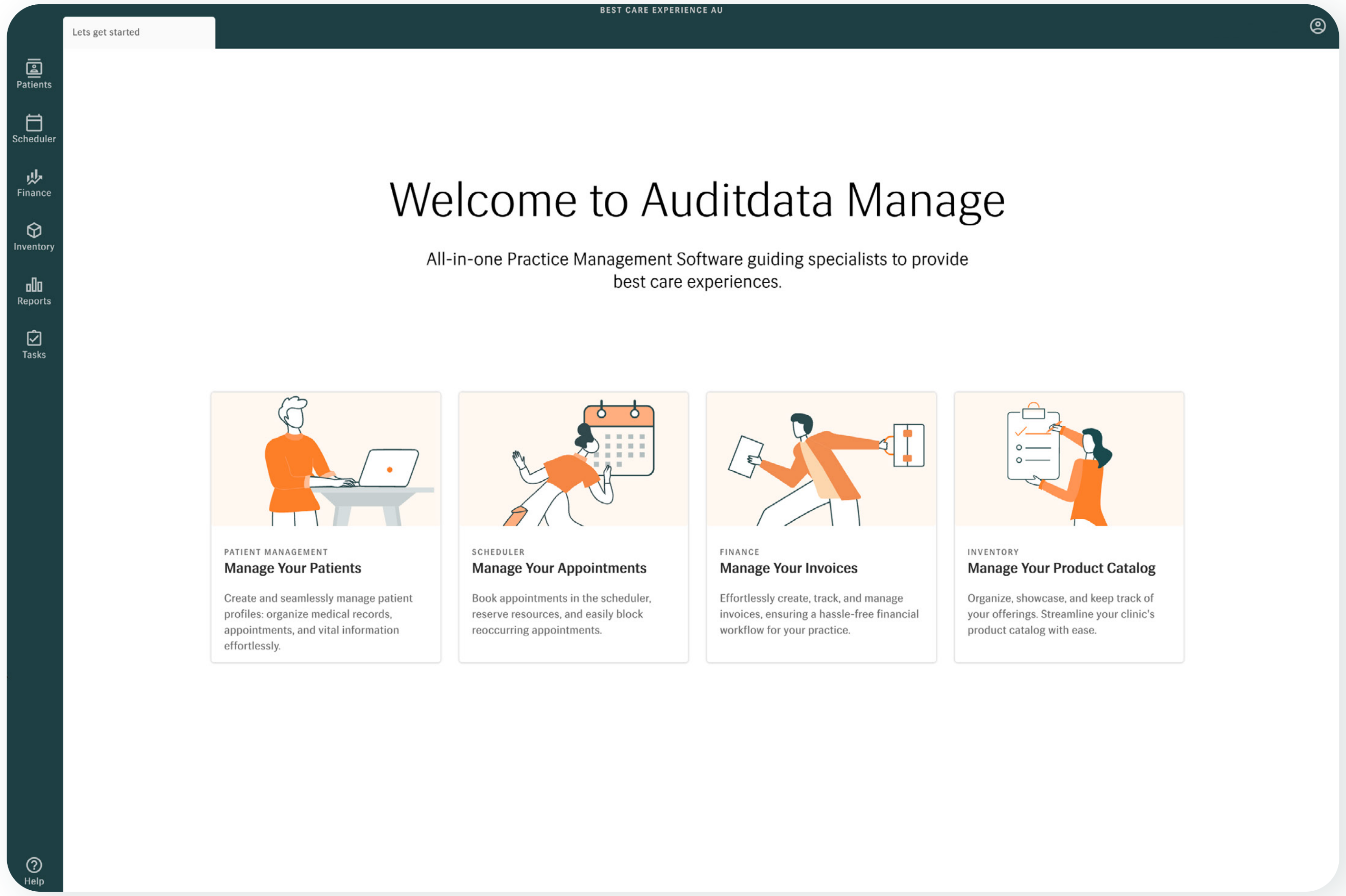
With Auditdata Manage, you can

Connect exclusive tools and resources to analyze client data in your management and communication platforms - whether you are dealing with digital marketing, hearing screeners, or other activities.

Segment your target audience, set up offerings, and track your performance.

Proactively reach out to your patients with in-depth filter and search and the ability to set up custom database fields.

Store all Noah data across your organization in one central client database. That helps you filter client data, like hearing losses, hearing aid models used, or the date of hearing aid purchase to enable better segmentation and relevance in communications.



Your PMS should allow you to query, filter, and segment your database quickly and easily. These capabilities help you identify whom you need to communicate with and the relevance of the communication to each patient.

Free Up Time
Where It Matters

Auditdata Manage, relieves staff of manual processes and data chaos, cutting paperwork and complexity out of the daily routine. The practice management software frees time up, so hearing care professionals can focus on delivering knowledgeable and tailored care to their patients.

To be able to make the correct management decisions and engage with your existing patient database, Auditdata Manage offers you complete visibility of the data you need to run your business efficiently and professionally.

Contact us for demo

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