YOU CAN DO BETTER: TOP 10 TIPS TO ENSURE AN EFFECTIVE CONSULTATION

BY KIM BLACKWELL

n many conversations with physicians, they ask, “What can I be doing to close more consults?” When given the opportunity to observe consultations, I notice many of the same areas in which practices could improve. Based on these experiences, I decided to put some framework around best practices on how to ensure an effective consultation. The following 10 tips, if performed effectively, should set up a practice to gain the trust of its customers along with their business. Several script examples have also been provided so practices can begin implementing some of these suggestions immediately.

Be prepared to make an impeccable first impression. A sloppy presentation by the patient care coordinator (PCC), physician, or office may lead the patient to think that these inefficiencies will transcend into the OR. Make sure all of the patient touch points have been optimized to instill confidence in the practice. This is known as providing emotional assurance. Areas to optimize include:

- **Check in/out.** Prominently post a credentialing piece reflecting the physician’s expertise. This could be in an 8.5 x 11 frame with a picture highlighting her education, experience, related PR, etc.
- **Patient rooms.** A safety chart is a nice touch. This is a piece that outlines the number of times the physician has performed his/her top five procedures.
- **Restrooms.** The restroom provides a setting for a captive audience. Use this opportunity to make an impact. On the back of the restroom door, highlight any pertinent accolades (e.g., “Seattle’s top physician”).
- **Waiting area.** Display a photo book and/or have an electronic frame highlighting the physician’s services. Include a testimonial book full of patient feedback that reflects their positive experience with the practice and the impact the procedure had on their quality of life.

Organize a functional and engaging consult room. Make certain the room is stocked with the essential tools (based on the procedure of interest) for providing a dynamic experience. These include:

- **Photo book.** Photos of other patients provide a great warm-up to patients seeing enhanced photos themselves.
- **Imaging system.** An imaging system is extremely valuable for allowing a patient to visualize results. Such images take dreams and make them reality.
- **Full-length mirror.** If a patient is interested in having a body procedure performed, she must be able to see her entire body. A larger mirror is suggested as it accommodates shorter and taller patients. There is nothing worse than a shorter patient who cannot see her feet because the mirror is hung too high or when a taller patient can’t see her neck and face because the mirror is hung too low. The average height of a female in the US is 5 feet, 5 inches.
- **Other tools.** An example is having both saline and sili-
cone implants on display for patients’ viewing so they can be empowered to make a well-informed decision.

Make certain you know in advance why the patient is coming in. This is not the time to ask why the patient is at your office. This is a big turn off for patients, as they tend to feel that the physician did not invest the time in getting to know their needs. Do the homework needed before entering the room. Examples include:

- Mining information from the Cosmetic Inquiry Questionnaire (CIQ) and/or other preliminary paperwork.
- Reviewing any pertinent patient notes in the chart.
- Receiving a briefing prior to entering the room from staff who have already spoken with the patient.

Conduct a confident and friendly introduction. Your introduction can set the stage for a positive experience. Spending an extra few seconds to personally engage with a patient helps her get into an open mindset and ensures a positive experience in which she feels cared for.

- Take the time to shake hands, look patients in the eye, and give them a friendly welcome to the practice.
- Introduce the PCC during this time. It is critical for client to feel comfortable with the person who ultimately will be asking for money.

Provide big picture overview. Providing an overview of the consultation visit allows the patient to begin with the end in mind. When patients don’t know what to expect, they begin to fill in the blanks with their own reality. Being clear at the beginning as to who they will meet, what will be reviewed, and the time it will take will relieve anxiety and allow the patient to be more focused on the experience. Explain the consultation process and outline what will happen over the next 60 minutes.

For example, if a patient is interested in a breast augmentation: “Jane, I am Dr. Smith’s patient care coordinator, Kim. I am going to be with you throughout the entire experience today, which should take approximately 60 minutes. There are essentially four steps to the process: Step 1: I will begin by asking you some questions about your health, what you want to accomplish with the surgery, what you are looking for in a surgeon, and your timeframe. Step 2: Dr. Smith will then come in to introduce himself, get to know you a bit more, and examine you. Step 3: If the doctor feels you are a good candidate and you wish to move forward, we can begin trying on implants. We can even offer you some imaging so you can see what you would look like with various sizes. You’ll be able to take the images home to show to your spouse/friends. Step 4: For the last 15 minutes, I will answer any outstanding questions you may have and provide you with a quote. How does that sound?”

Credential physician, practice, staff, etc. Credentialing the physician and the practice provides additional emotional assurance that the patient has picked the best place/provider for her treatment. This is critical to a successful consult and should be done by both the PCC and the physician. The team should share:

- Years of experience. Example: “Dr. Smith has been performing breast augmentations for over 20 years.”
- Number of procedures performed. Example: “Out of the hundreds of surgical procedures Dr. Smith performs each year, breast augmentation is his most popular.”
- Education. This is particularly great to share if the physician is “homegrown,” meaning that he/she was educated locally. For example, in Seattle, sharing that the physician graduated from University of Washington is important. Also, if the physician received his/her education from a learning institution such as Harvard, be sure to emphasize this as the perceived expertise that many people associate with an Ivy League school will produce immediate trust.
- Articles published. If the physician has published any articles on the procedure in which the patient is interested, by all means, share! This lets patients know that the surgeon is an authority on this subject.
- Lectures. If the physician has spoken nationally or internationally on a procedure in which the patient is interested, let her know. Again, patients love hearing how amazingly talented “their” surgeon is. They are sure to share this when they begin talking about their results with their girlfriends.
- Special talents. If a physician has a special talent, patients want to know. I will never forget being at a conference once and hearing a physician say in relation to his work in liposuction, “Many physicians can make you look good with your clothes on; I can make you look good naked.” That was over 10 years ago and it stuck.
- Personal/staff testimonials. Nothing will gain trust and confidence faster in regards to the ability to deliver exceptional results than having the endorsement of a patient. Some offices use patient ambassadors. These are patients that were so happy with their results that they offered to speak to other patients about the physician’s work. I have known a few practices to be so successful with this that they now are categorizing ambassadors by occupation. For example, if a dental hygienist comes in and is concerned about downtime resulting from a breast augmentation since she uses her chest muscles daily to perform her job, then speaking with another
dental hygienist who has managed that downtime is a valuable option. It could be that voice that provides the one piece of information that solidifies the surgery for the practice.

Gain a more in-depth understanding of patient’s needs and wants. It is important to gather insight into the patient’s specific needs and wants by inviting her to discuss how, when, and why she became interested in the procedure/treatment. This conversation helps identify the patient’s level of urgency and reveals how far along she is in her decision-making process. Understanding this assists in guiding the conversation forward and is helpful for scheduling. It also illuminates areas in which additional emotional assurance can be targeted. Questions to ask include:

- What research have you done?
- Have any of your friends or family members had the procedure?
- Was there any particular life event or thought process that precipitated your interest in this treatment/procedure?
- What is most important to you when choosing a surgeon? (This is great to know particularly if the patient has seen or will see other physicians for consults.)
- When are you thinking of having the treatment/procedure?

Leverage emotional connection and express desire to perform treatment/procedure. The success of this delicate but powerful overture rests upon the physician’s ability to leverage the foundation of rapport and emotional assurance created in the team’s earlier efforts. Physicians must be swift and convincing in this bid while remaining genuine. As an example, I was able to witness a consult for a rhinoplasty. The physician had known this patient since she was first established in the practice. He shared, “As soon as I saw your name on the schedule for a rhinoplasty consult, I actually began doing your surgery in my mind. I’m so glad you chose to come to me for a consultation.” The patient booked the surgery without hesitation.

Agree on where you are in the process. Hopefully this is when the patient agrees to move forward with the process and agrees to book an appointment. If it isn’t, it is important to agree upon where you both are in the process so the practice’s team knows how to proceed.

Outline next steps. Once it is determined where you are in the process, it is critical to guide the patient in her next steps. If you fail to plan for your patient, plan to fail on gaining that patient’s business. Patients need to know the plan. Here are ways in which the team can accomplish this:

- Use a “next step” card. This will allow the practice to:
  - Let patients know who will be following up with them and when. For example: “Jane, I know we have given you a great deal of information, and most likely you will have questions. I would like to follow up with you in one week. Could we go ahead and establish a time and date for me to call you? I will write this on your next steps card along with my direct line in case you have questions prior to my call.”
  - Leverage patient ambassadors. As previously mentioned, these are satisfied patients—commonly known as beauty buzz-makers—who have agreed to share their experiences with others. For example: “Jane, you mentioned that you would like to speak to another dental hygienist who has received a breast augmentation with our practice. I have attached her name and number along with the best times to reach her.”
  - Provide a patient packet. For example: “Lastly, I have included a packet of information that includes the quote we reviewed today, the sequence of events once you book a surgery date, a list of patient testimonials, physician credentials, and the pamphlet A Girlfriend’s Guide to Breast Augmentation. We pride ourselves on education so we want to make sure you are equipped with all the information to make a good decision. Based on what you told me today, I am more than confident we can meet/exceed your expectations. I look very forward to having you in our practice again.”

MEET PATIENT’S GREATEST NEEDS

Top of mind for the majority of aesthetic physician-owners is how to best leverage the patient consultation to result in a procedure. These tips outline how a practice can put its best foot forward once it has accomplished the difficult task of getting an interested subject into the office. When Oprah retired, I remember her saying that one of the most important lessons she learned about people is that we all just want to feel valued and understood. By utilizing these tips, you are meeting the patient’s greatest needs, which will hopefully translate into more effective consultations in your practice, and ultimately, more procedures.

Kim Blackwell is a management consultant with the Allergan Practice Consulting Group, a specialty pharmaceutical company based in Irvine, CA.