

Advanced Practice

MANAGEMENT

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NEW PATIENTS AND MARKETING

Month: _____

Practice: _____ Team Member: _____

Current Promotions/Campaign:

New Patients: Goal: _____ This month: _____ Last Month: _____

Referral Sources:

Referred: _____ Internet: _____ Location: _____ Insurance: _____ Word of Mouth: _____

Other: _____

Online Activity:

Google+ Page: Views: _____ Clicks: _____ Google Rating: _____ Google Reviews: _____

Google Analytics: New Website Views: _____

Facebook: Posts: _____ Likes: _____ Shares: _____ Reviews: _____

Negative Feedback To Address:

Website Updates:

E-Blast:

Thank You Cards:

For Referrals:

For Reviews:

- Role play new patient intake verbiage
 - Welcome?
 - Proper insurance verbiage?
 - Asking about other family members?
 - Number of shoppers that did not schedule _____
 - Why not? _____
- Number of New Patients _____
- Top three new patient referral sources _____
- Thank yous for referral sources sent?
- Internal referral program
 - Role play invitation for internal referral program

Schedule: Availability for new patient appointments within one week? YES / NO