



A Guide to Maximizing Physician Referral Strategies

This learning guide assists private practice physicians to understand better the importance of referral strategies and the opportunities for creating new relationships with key referral sources. Referral strategies are critical for all physician practices regardless of age, location, specialty and patient mix. For primary care physicians, knowing who, where and when to refer patients for specialty care is critical to their patient's outcomes and continued well-being. Regarding specialists, knowing the proper targeting and customer service strategies to engage and earn referrals from primary care and other practices is a lifeline to their practice. Timeliness and communication in the referral process are essential for successful relationships and better patient outcomes.

Managing the Referral Continuum

Like patient care, the referral process is a fluid and changing continuum. From the referral source to physician practice and back to the referral source, the ongoing continuum requires a careful balance and exemplary customer service to impact patient care and positive referral relationships effectively. It is essential to recognize the different needs that each referral source or recipient must achieve a positive experience and patient outcome.

What Do Primary Care Physicians Value Most?

Making a patient referral to a specialist or other resource is, in essence, an extension that the primary care physician provides to their patient. Therefore, quality care and timing are critical determinants of that referral decision. Quality is crucial as practices want their patients to be in the best hands possible.

Once a referral is made, physicians value timely patient updates and necessary discharge and follow-up information for ongoing patient care. Primary care physicians – unless in extreme circumstances – want their patients to come back to their practice for ongoing care and disease management.

The timeliness of a referral is another important determinant in making a referral from a primary care physician to a specialist. In a more urgent situation, primary care physicians value a referral partner who can see their patient quickly and help determine an immediate diagnosis and treatment protocol. The referral they make, in as timely a manner as possible, results in better patient care – which reflects on their practice and overall patient satisfaction ratings; all part of the sensitive referral ecosystem that exists from practice to patient to practice.

A patient referral to a colleague is a show of trust and respect. From a specialist's view, it is an important (and sometimes only) source of new patients. Therefore, a valuable consideration for specialists is to extend gratitude for the referral through a thank you note or phone call in addition to a copy of your office's patient exam note. Let a referral source know that you appreciate their trust and will provide your best care to their patient promptly and efficiently.



How Can Primary Care Physicians Be More Proactive About Making Referrals?

As discussed, timeliness is an essential element in the referral continuum and significantly impacts patient outcomes. The more proactive primary care physicians can be in their referral strategies, the more they can improve patient care.

Here are some important ideas for primary care practices to be more strategic and proactive in their referral approach:

- Identify the patient conditions you see most that require a referral. Chances are, many of your referrals are for similar conditions and require similar specialty care. Identifying common referral patterns will help you plan proactively.
- Based on these referral tendencies, identify specialists and practices that focus on these conditions in your area. Online research, health system directories, payer directories and word-of-mouth referrals are excellent ways to learn about these preferred practices.
- Once you've developed a list of specialists in your area who meet your care criteria, manage this list, and update it regularly based on patient satisfaction, feedback, and outcomes. This list can be either a hardcopy or online and should be accessible to those on staff who facilitate referrals.

What Can Specialists Do to Engage With Primary Care Physician Practices?

Specialists can be proactive regarding their referral strategies, like their primary care colleagues. While not an exhaustive list, some suggestions include:

- Provide marketing materials and articles highlighting your area of expertise and conditions you regularly treat to primary care practices in your area. Include:
 - Special expertise, diagnostic or procedural equipment in office
 - Appointment availability
 - Wait times
- Establish strong relationships; make in-person visits, when possible, and remember to express gratitude for referrals to your practice.
- Identify new primary care practices in your area and send a welcome note or other gesture to introduce your practice.
- Know the “80/20” rule.
 - Approximately 80% of your referrals will stem from 20% of the same referral sources.
 - Identify who they are and manage this list with solid customer service strategies.
 - Be sure to identify other gatekeepers, such as practice administrators, nurses, PAs, or other influential individuals in the referral process.
 - Develop an action plan to maintain ongoing contact with this critical customer base, maintaining frequent connections and other outreach tactics.
- Create patient compliance and patient “pull-through.”
 - Just because a practice refers to you does not automatically mean the patients will come. Compliance is a crucial issue for referrals and you can implement strategies to encourage patients to follow through on their appointment.
 - Once a referral is made, prospective patients will most likely look you up online. Therefore, it is important to maintain a strong presence online that establishes trust and confidence.
 - Establish protocols in your practice to proactively contact patients referred to your practice to schedule an appointment within the acceptable timeframe for their condition.

Customer Service Strategies

No matter the type of practice or key audiences, today's successful physician practice requires exemplary customer service strategies for growth and sustainability. While more savvy about patient outcomes, referring physicians will also engage in their patients' feedback about quality when making subsequent referrals.

While there are many forms and aspects of customer service, the "Four C's" will help you maintain strong patient relationships.

The "Four C's" of Customer Service

- Communications
- Credibility
- Capacity
- Consistency

Communications

Maintaining solid communications with your "customers" requires a well-planned approach. Each referral source you consider should have a set number of contacts and other outreach tactics. The more you know about each referral contact, the more specific and helpful you can be regarding any unique or need-based opportunities they might have.

Especially for primary care physicians, it's important to know the status of their patients and important discharge and follow-up care information. A brief message, email and phone call alerting them to these critical insights will be most appreciated and go a long way toward building a strong relationship.

Another important aspect of customer relations is providing marketing materials about your practice, such as referral forms and business cards. Keeping these materials simple, updated and convenient will help referral sources know more about your practice:

- What makes it unique
- Background of your providers
- Locations
- Languages spoken
- Other important information

Credibility

When a referral is made, both the referral source and their patient want confidence in your practice. As such, it is crucial to maintain your reputation and credibility in as many ways as possible.

These include maintaining a robust online presence with articles and community outreach, patient testimonials and looking for other sources to enhance your reputation and thought leadership.

Capacity

The ability to accommodate patient referral requests is an important customer service strategy. When a referral is made, it is important to the physician that their patient can be seen within the right timeframe for the condition. Based on your patient load, you can determine your practice's capacity and use it as an important customer service strategy. As part of your referral strategy, making it as easy as possible for physicians to refer their patients—and their patients to be seen—are important indicators.

Consistency

All the previously referenced customer service strategies depend on the last "C" – consistency. Your ability to provide these types of initiatives in a timely, consistent manner will win over your referral sources and make you a go-to when it comes to providing patients with the expertise they need when it is needed most. Please keep track of your contacts with your referring physicians and establish a calendar that helps you maintain visibility with them throughout the year.

Online Strategies to Bolster Referrals

Physician practices must maintain a strong digital footprint and align independent digital channels to create a cohesive online presence in the modern digital landscape.

This entails integrating the website, social media, content marketing, SEO and online reputation efforts to reinforce one another. The website serves as the central hub of your digital landscape. At the same time, social media platforms enable engagement, areas for thought leadership and the ability to humanize the practice via social posts. Content marketing establishes thought leadership, and SEO enhances online visibility. Lastly, maintaining a positive online reputation is crucial for building trust. By aligning these digital channels, physician practices can establish a robust online presence, attract new patients, increase their reputation and referrals among peers, and ultimately cultivate lasting growth and success.

For more information on creating your digital strategy, click [here](#).

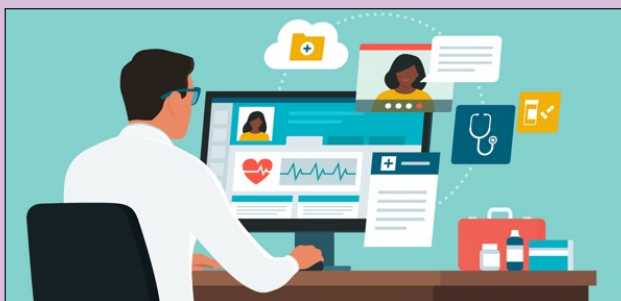
Your Website is the Center of All Activity

In a connected digital environment, your website is the center of all activity – it is the authoritative place where audiences will learn more about you, select and schedule their care, and refer to various stages of their care journey.

To that end, consider updating your website to include the following content:

- **Biographies/CVs:** Including detailed biographies and CVs of physicians helps build trust and credibility with potential patients and peers. Physicians often seek information about a doctor’s qualifications, specialties and experience before referring.
- **Unique Competitive Differentiator/Marketing Advantage:** Highlighting your practice’s unique competitive position can set you apart from others in the area. This content can showcase specialized expertise, cutting-edge technology, or exceptional patient care to attract referring physicians seeking specific services.
- **Other Practice Information:** Providing comprehensive practice information, such as languages spoken, office hours (including weekends), affiliations with hospitals or medical organizations, services offered, and procedures performed, ensures that physicians (and their patients) can make informed decisions about their referral choices.
- **Reviews/Testimonials:** Including reviews and testimonials on a physician practice website can build trust and credibility, reassuring potential referrers about the quality of care and positive experiences shared by others.
- **Blog Posts, Links to News Features, or Other Media Coverage:** A blog section featuring news links or media coverage showcases the practice’s expertise, innovation and community engagement.

Ensuring your practice’s website contains this content will help site visitors find the information they want about your practice, enhance transparency, and facilitate an improved referral experience.



Online Reputation

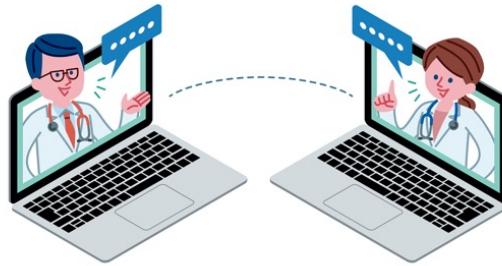
“Online reputation” refers to the perception and image of a doctor or health care provider through online channels, such as review sites, social media, and other online platforms. Potential patients and referral sources often rely on these online reviews and information to choose a healthcare provider. A positive online reputation can build trust, attract more patients and enhance the doctor’s credibility.

Other Sources for Professional Referrals

Other sources of patient referrals can stem from entities outside of physician practices. For primary care physicians, these types of services can include urgent care centers, emergency rooms and other specialty programs (wellness, fitness, diet, etc.) that often are seen by consumers who do not have a personal doctor. Offering introductory meetings with medical directors and staff is an excellent way to discuss the importance of having a physician and your accessibility in taking on new patients. Consider supplying these entities with displays, posters and other collateral that feature your practice in their waiting areas and treatment rooms, if allowed.

Local businesses and community centers are also excellent sources for new patients. Many larger organizations in your area will also have on-site health care professionals open to introductory meetings. Offer presentations on location-based health needs such as employee health risks (for industry) or preventive tips (for community centers). All these settings allow you to showcase your practice and introduce yourself to community members.

Other community outreach to consider for new sources of patient referrals include schools and health and social service agencies. In these cases, introductory meetings with administrators or on-site health professionals allow you to present your practice as a viable resource for people seeking ongoing physician care and a regular doctor relationship. These and other forms of community engagement are excellent strategies to generate new patient referrals. The more you are out there, the more opportunities you create for prospective patients to learn about your practice.



Disclaimer: The information and guidance provided in this document are believed to be current and accurate at the time of posting. The information is not intended to be and should not be construed or relied upon as legal, financial or consulting advice. Consider consulting with an attorney and/or other advisor to obtain guidance relating to your specific situation. References and links to third parties do not constitute an endorsement, sponsorship or warranty by the AMA, and the AMA hereby disclaims any express and implied warranties of any kind.