



## **Patient Development Market Strategies for Concierge Medical Practices**

- Clarify specific market to target
- Create communication message for target markets
- Develop tools and actions
- Execute a market strategy that produces an on-going and consistent flow of new patients for the practice

### **4 Target Market Groups**

1] Affluent Seniors 60-75

2] Affluent Middle-Aged Children of Aging Parents Who Influence Their Parents

3] Existing Patients as a Referral Source

4] Outside Referral Sources

- \* High End Realtors
- \* Home Health Agencies
- \* Mobility Dealers, Aging in Place Consultants and Contractors
- \* Care Management Professionals
- \* Medical Supervisor at Independent Living Communities
- \* Elder Law Attorneys
- \* Church Pastors who are in Charge of Senior Members

### **A Few Ideas for Marketing Tactics and Activities**

- 1] Send an intro letter and brochure to new residents weekly with home values above \$400k.
- 2] Contact general managers of country clubs that have a residential community component and request to put an announcement in the resident newsletter that your services are now

available in their community. When you prepare the announcement include your phone number and web site. You should also ask if you can make your brochures available in their reception area.

3] Contact property or resident managers of high-end senior condo and apartment communities using the same “service now available in your property” angle and same requests as in the country club properties above.

4] Send introduction postcards to residents in 55 plus deed restricted communities. You can use the every door direct program offered by the USPS to save money by not having to buy a mailing list.

5] There are about 24 categories of businesses that service seniors with products or services [we can send you a list of these categories]. Research the email addresses of each of these businesses in your market with the theme “Can We Help Any of Your Clients?” The email will introduce your practice and its unique benefits to seniors that you offer. The close of the email will include a line such as “You are in the front line with your client and in a position to know if they might need us. If you find this to be the case with any of your clients, please let them know that we are here to help them have better health”.

6] Target churches in affluent areas. Contact the associate pastor/minister in charge of the senior members [or the pastor if they do not have this position]. Offer to hold a health forum at the church where their members can ask questions of the doctor. At the event you can ask pre-prepared questions to get the program started before the audience asks questions. At the event ask for name and email addresses [set up a registration table] and hand out brochures. Prepare your own announcement [with your web site address] to give the churches for their use in announcing the event [so that you control the messaging]. Groups are always seeking activities that they can program for their members. And this free health-related program that you can offer is very topical.

7] Target upscale senior living communities. Offer the same program as described for the churches above to the activity directors of these communities.

8] The easiest way to target affluent children of aging parents is through their professional contact information. Make a list of professions that have high income professionals [CPA’s, Attorneys, Engineers, Architects, etc.]. Do a google search by category [i.e. Attorneys “Your City and State”] and obtain email addresses from each web site. If the web site does not have an email address but has a facebook logo, click through to the facebook page as in many or most cases they have an email address. Also, the chamber of commerce on-line directory and web sites for professional chapters of different professional categories are a good source for email addresses.

9] When you admit a new patient to the practice, a follow-up thank you card should be sent by the doctor by mail within a day of their first appointment. Then another person should follow-up by telephone within a week to ten days after the first appointment with the reason being that “we are just following up to see how you are and to make sure your experience with us was satisfactory when we visited with you for your appointment”. For existing patients this can be done after their next appointment with the doctor. This sets the course to establish a “community” with your patients to establish the groundwork for creating an atmosphere for on-going referrals of new patients from your existing patient base. In the follow-up phone call one of the questions should be an inquiry into what hobbies or interests the patients has.

There should be 5-6 additional communications with the patient every year. A birthday card signed by doctor and staff should be sent. An article copied from a magazine or newspaper that relates to one of the personal interests/hobbies of the patient should be sent at least once or twice a year with a handwritten sticky note “Thought this might be of interest”. A patient survey with 4-5 questions about their experience with the practice should be emailed or mailed [with a return postage paid envelope] once a year. At the bottom of the survey should be the question: Do you have any friends that you might refer that can benefit from our services? Six months after a survey is sent, a personalized letter from the doctor should be sent with the theme that he is seeking to grow his practice and after thanking the patient for being a patient, pose the statement that he would appreciate a referral of any friends that might benefit from the concierge services that practice offers.

And once or twice a year, a staff member should make a call to the patient just to check and see how they are. This series of communications will serve to make for a closer patient relationship and set the right scenario for when the doctor asks for a referral, the patient is inclined to try to help with that. These communications should be timed for between 1 – 2 months apart from each other.

10] The local real estate board can provide a list of the Realtors who have sold the most expensive homes in your area. You should also obtain a list of Realtors with the Seniors Real Estate Specialist® (SRES®) designation as they specialize in working with Senior clients. You can also make a list of the agencies that are located in the affluent neighborhoods. From that list you can go to their web sites and obtain the names of each active Realtor on staff. Send them a letter of introduction about the practice plus a brochure. State that the reason that you are writing to them is twofold. The first is to introduce yourself and what the practice is about. That you are seeking to make them aware of your services in the event that they sell a property to a person or couple over 60 years old so that they can make their client aware of your concierge healthcare services that are available. The second reason you are writing is to offer to supply articles for their newsletters that they might send out to their database of prospects as part of their content.

11] Home Health Agencies and more specifically the aides that are at the locations taking care of the seniors are great sources of referrals because they have an existing relationship with potential patients of yours. Send an email to the owner, operations manager and clinical supervisor at each agency. The email should explain that you want to introduce yourself and the benefits that your practice offers. Make a one to two paragraph outline of what your practice offers. And then request that the person forward this email to their staff that is in the field working with the seniors on a day to day basis so that they can share this information if one of their clients can benefit by concierge doctor visits. Close with a remark that mentions that you look forward to a back and forth referral relationship to refer clients to each other.

12] Contact mobility dealers and aging in place consultants and contractors by either email or phone calls. Make them aware of your concierge physician model and ask them if you can send brochures to them to provide to clients who might prefer having a concierge doctor relationship. Do the same for care management professionals, medical supervisors at senior Independent communities and church pastors in charge of seniors. The key is to stay in touch at least four times a year with each and in addition to touching base always try to do something for them as well.

13] You can build an email database of elder law attorneys via a google search. Write an individual personal email to introduce your concierge practice and the benefits of the doctor house call format of the practice. End the communication by asking that if they have any clients that might need or prefer in-home physician care that you would appreciate the referral to your practice. This tactic meets two objectives. The first is to make the lawyer aware of your practice in the first place and the second is to turn the attorney into your sales representative. Keep in mind that the elder law attorneys have clients that are seniors and skewer to the affluent market that can afford their fees for wills, trusts, etc. The same target market that you have.

## **Marketing and Communication Tools That Need to be Developed**

Letter of introduction

Practice brochure [how practice works, benefits of practice, Q and A section]

5 x 6 postcard

Email template for general introduction

Patient survey template

Realtor introduction letter

Email template to home healthcare agencies

Email template to elder law attorneys

## In Summary

The tactics cited above are intended to provide you with a few ideas on how to market to affluent seniors directly as potential patients and to those that have the ability to directly influence seniors to become patients with a highly targeted approach. This is not by any means a comprehensive marketing plan but rather an outline of how you can market your practice quickly without the need to spend large sums of money for patient acquisitions.

This approach is what we like to call an oil field method. Choose a handful of target activities rather than just one or two. Execute each one consistently each week. Some weeks you will get “oil” from some of the areas you are drilling and other weeks you will get “oil” from other of these areas that you are drilling. But with this diversified approach, you are always finding new “oil” in the ground on a regular basis.

***We are available for advice and coaching to further explain, advise and coach you with developing and implanting any part of the above strategy. There is no fee or obligation for this assistance any time that you might request it.***

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## **Programs and Services Available From our Group to Assist Your Practice Develop New Private Pay Patients**

If you would like to outsource any part of your marketing efforts, these are the areas that we can assist you with:

### **1] Marketing Material and Content Development**

We can create and produce your design and communications content for any brochures, postcards, letters, email templates, etc. that you may wish to utilize in your marketing activities. Fees quoted on an individual basis.

## **2] Speaking Engagements**

We can develop public speaking opportunities at churches, independent living communities, country club communities and with other senior groups where the doctor would engage the audience in a Q and A format.

3 Speaking Events \$435.00 (\$145 each)

- Includes a half page ad in Senior Lifestyles magazine for 3 months
- Guaranteed delivery of 3 Education Forum Speaking Engagements within 5 months)

6 Speaking Events \$750 (\$125 each)

- Includes a half page ad in Senior Lifestyles magazine for 5 months
- Guaranteed delivery of 6 Education Forum Speaking Engagements within 9 months)

10 Speaking Events \$999.00 (\$99 each)

- Includes a half page ad in Senior Lifestyles magazine for 12 months
- Guaranteed delivery of 10 Education Forum Speaking Engagements within 12 months)

## **3] Senior Lifestyles Magazine – Edition in Your Market**

We publish Senior Lifestyles in over 45 markets in the United States including yours. Our target market is affluent seniors.

Click the link below to view a sample:

<https://www.creativedevelopmentworks.com/app/download/970645837/senior+lifestyles+march+2022.pdf>

Digital version distribution is about 8,000 per month in your market.

OPTION ONE - Full Page Ad - 1 month insert \$99.00

OPTION TWO - Full Page Ad - 3 months \$199.00

OPTION THREE - Full Page Ad - 6 months \$399.00

OPTION FOUR - Full Page Ad - 12 Months \$899.00 or Half Page Ad 12 months \$699.00

With the annual ad package you also receive these additional benefits:

[1] Profile article about you and/or your team in one of the issues

{2] The right to submit articles of advice [separate from your ad insertion] during any month

[3] One free additional month of ad insertion for a total of 13 months with this package

## 4] Email Campaigns to High Income Professionals

Our group will develop a database of professionals in high income categories, develop an email communication template [messaging about your in-home house calls for their parents] and send these to 3,000 professionals each month. Fee is \$299.00 per month.

## 5] Senior Experts and Providers Direct Mail Program

We are preparing a high impact direct mail piece to send to 10,000 affluent seniors in your market. The full color mailer will be 11 x 17 sheets folded into an 8 ½ x 11 format [think newsletter look].

The title and theme of the piece is *Experts and Providers for Seniors*. Each participating business, professional or healthcare practice will have a choice of two types of insertions:

A half page profile with images and contact/link information [\$499]

Or a full-page insertion which can include an article of advice to the senior plus a profile section [\$699].

There will only be one business participating in each business category.

Our group can develop and create the content with your feedback.

We are purchasing the 10,000 names of seniors in your area based on [1] at least one senior occupant between 62-75 years of age and [2] value of property starting at the highest value and descending down. This is to ensure that we are reaching our target market of affluent seniors.

This program will put you right at the home of your target market with the high probability that it will be read because if it's format look of being a guide featuring the leading businesses, professionals and healthcare practitioners in their field.

Please advise if you have any questions or if we can assist you with any of these marketing/communications services. Our group specializes in creating media brands and market platforms to connect businesses and professionals to their markets.

**RJW | Senior Resources Network**

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