Program Setup - Practice Management - creating & tracking marketing events

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Overview

Practice Management lets you designate what you want to set to qualify a doctor as an A/B/C/D referral. The rank criteria is what they are basing the rank on (cases would be teeth added, production would be fees posted - generally speaking it is better to rank based on production since one patient could have had 4 teeth added but it ended up only being treatment and billing for one). Then the percentages represent what they want to be considered the top tier of referrers.

Setup – Program setup – Practice Management

Set/Rest Rank

Set initial (or reset) doctor rankings based on the last three months' production. This button will calculate (or recalculate) the rank of each referring doctor based on the number of points assigned to that doctor and on the division specified by the following item.

Rank Criteria: By Referring Doctors Production or Number of Case

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Rank Divisions

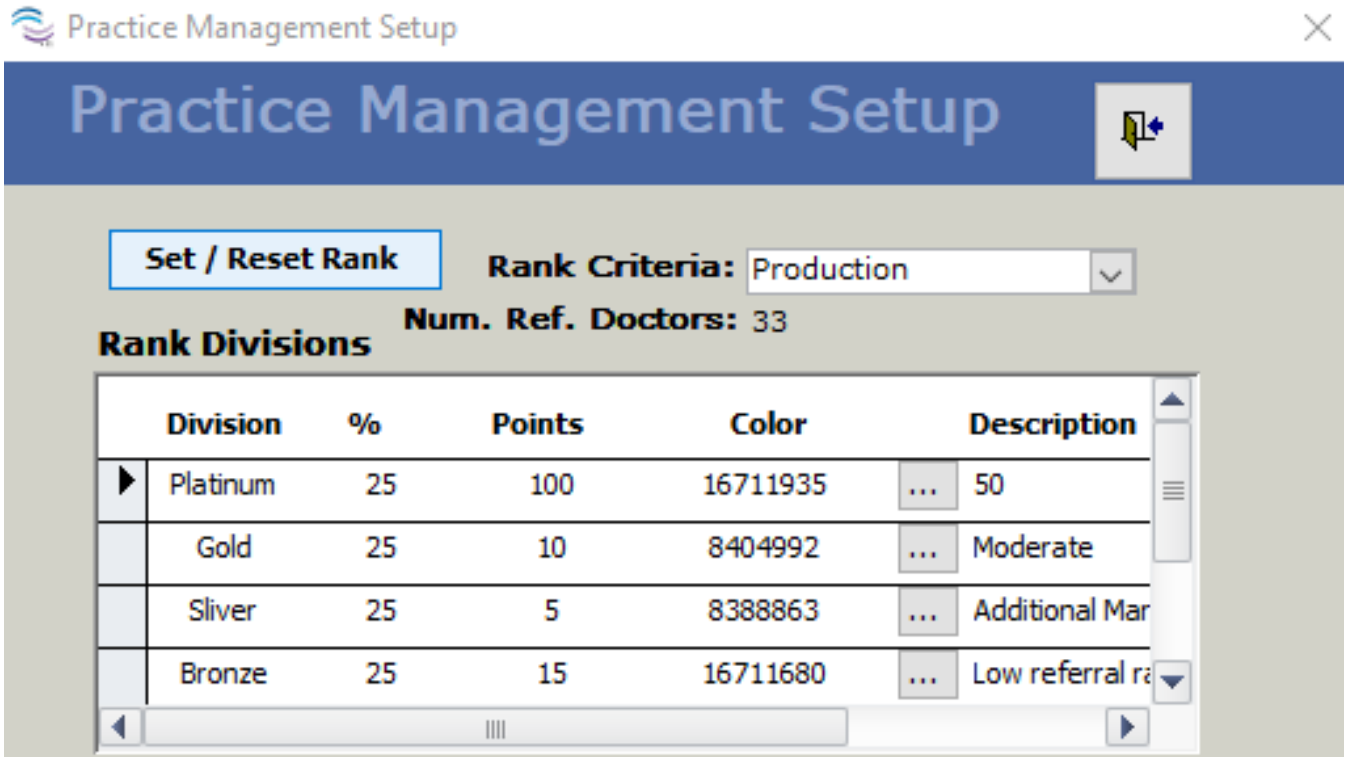
Division - Division is the name assigned to each group and is user generated

% - The percentage of doctors that qualify for each division based on the rank criteria. For example, the top 25% of providers based on production would be assigned to the Platinum division is the image below

Points – Points assigned per doctor based on the events added on their profile page

Color – Customize Divisions with a color if you like

Description – Description of your divisions for future reference when assigning/reassigning ranks

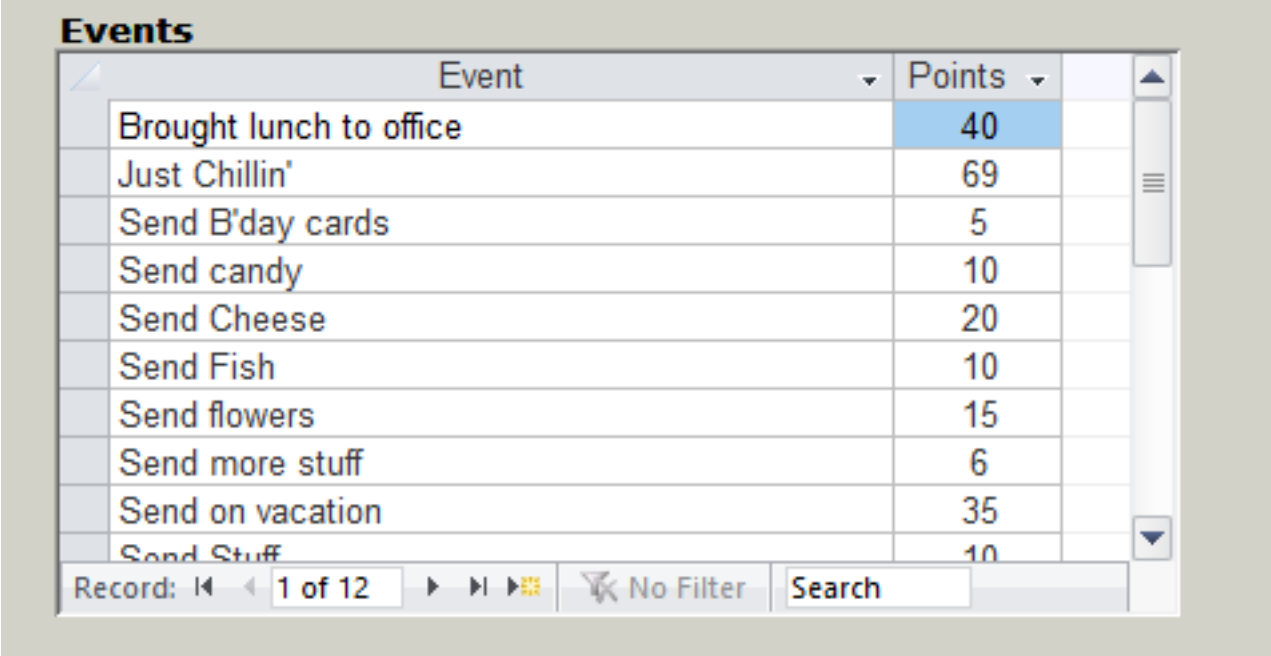


Events

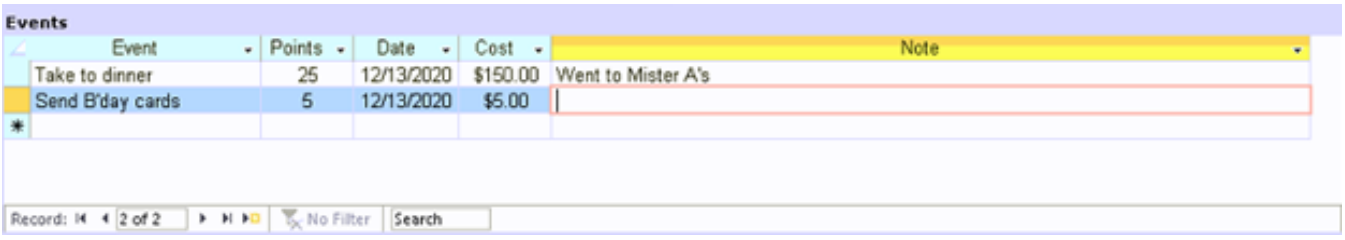
You can set up events and assign them point values. There is no one way to assign points, most people come up with a system of cost and time. For example, sending a birthday card might be 2 points because it was inexpensive and did not take much time to accomplish, but bringing them lunch for their birthday might be 20 points because it was costly and took more time. The points and cost are recorded on the individual doctor's pages and then are totaled on the practice management snapshot page.

Event – showing a list of all possible marketing event entries

Points – How many points the event should be worth. Points would be assigned based on cost, time and difficulty. Sending a card for example would be a smaller point value, where bringing lunch to the office would be a larger point value.



To record an event, you would go to the referring doctor's information page and scroll to the bottom. After you have selected the event from the drop down list, you can add how much you spent on the event(s) and any notes regarding the event.



Referred Marketing Events Report

The ranking comes from reports > referring doctors > referral ranking (or reports > referring doctor detail > double click on rank) and the percentages would be the top 15% of the referrers based on rank would be A, the next 10% would be B, the next 10% C, so on. So in other words, if they had 100 doctors and ran the referral ranking report the first 15 doctors (i.e. the first 15 who had referred the highest amount of production) would be assigned as category A.

This is a report that should be run on a regular basis so they can track previous v current because if they only set/reset the rank once they have nothing to gauge against. Will Show Referring Doctor, Event Date, Cost, Points & Description.

Reporting Tools - Referring Doctors - Referred Marketing Events

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