



PATIENT LOYALTY

How to Keep Your Patients Coming Back

LEARN TO BUILD AN EFFORTLESS EXPERIENCE
FOR PATIENT RETENTION AND STICKINESS



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Every successful practice knows how to get patients. That much is obvious. If there are no patients, there is no practice. The trickier part — and the part that every practice that wants to grow has to figure out — is how to retain those patients.



*6-7x less to retain
a patient*

Most companies spend the majority of their money trying to attain new patients, but it actually costs your practice [6-7X less](#) to retain a patient.

How do you retain your patients? It all comes down to your patients' experience with your brand.

It's not enough to have a great product-market fit. You also have to create an experience that keeps your patient satisfied enough to continually choose you over a competitor.

How do you keep your patients satisfied? At a high-level, it's quite simple: you provide them with products, services, and experiences that are effortless on their end.

At a not-so-high level, you're probably thinking, "So what does an effortless experience actually look like?" Well, that's what this ebook is all about!

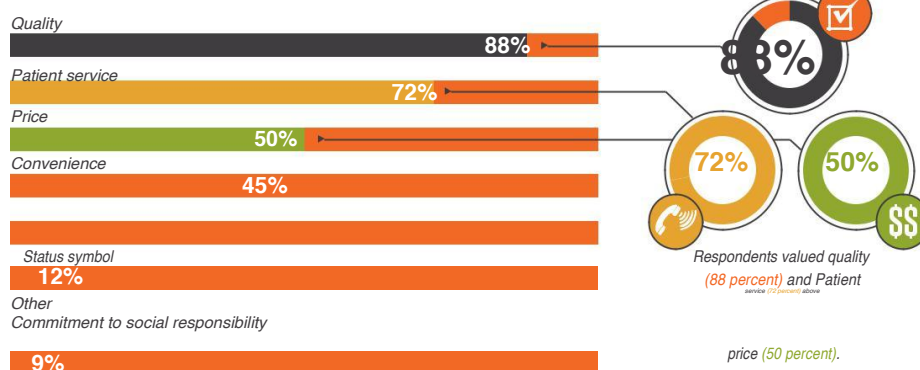
WHAT IS AN EFFORTLESS EXPERIENCE?

Every consumer has had positive and negative experiences with a brand. There are plenty of infamous examples to choose from when thinking of bad patient service experiences.

A product might be really great for the most part, but as a consumer, the first time that you have to sit on a phone for two hours going back and forth through patient service channels, you're likely to be a bit turned off from that brand. Product, schmoduct.

You can probably think of a few cases when great patient service outshone the product itself. Ever been out to a meal with "meh" food, but an overall excellent dining experience otherwise? Sure, you may not frequent that restaurant often, but being served by a warm, friendly wait staff in a nice atmosphere made your experience very enjoyable.

What makes you loyal to a brand?



Patient satisfaction isn't just about whether or not the product works for the patient. Patient satisfaction is about the entire experience of buying, using, and troubleshooting the product or service.

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Your goal is to please your prospects and patients — no matter where they are in the buyer's journey — by [creating an experience that is as hassle-free](#) for the patient as possible.

Your product is only one piece of the equation. In reality, patient service is what drives [revenue, retention, reputation, and referrals](#).

Now that you understand what an effortless experience is in theory, let's move on to the building blocks of how to create the effortless experience.

BUILD TRUST WITH YOUR PATIENTS

Every interaction patients have with your brand impacts their perception of your product. That's why building trust with your patient is so important.

Trustworthiness is tough to measure, but you can start by evaluating and improving on patient satisfaction.



1 INNOVATION

Building trust with your patients starts with building great products and services that actually help your patients. It's not enough to just sell your patients the same thing over time.

You have to be constantly looking to innovate your products and services. Don't stick with the status quo. Constantly strive toward making life easier on your patient by serving them with awesome, helpful products.

- Your patients will give you feedback and complaints via forums, calls, and through e-mail. Don't just let that information sit there. Collect and track this information and use it to iterate on your products.
- Don't just rely on your patients to provide feedback on their own. Survey them to figure out what they love about your products and areas they think need improvement.

- Use social networks to follow product trends and directly ask consumers for ideas.
- Plan for innovation: make it a part of your practice. Create target goals for products and encourage your team to constantly be looking for the next big idea.
- Eliminate unnecessary product constraints and combine your products with other compatible products to make life easier on your patient. Think about the modern smartphone as an example. Why punch multi-function buttons when you could just touch a screen instead? Why just have a product that can make regular calls, video calls, take photos, and search the web?



COMMUNICATION

Building trust starts with how you communicate with your patients. How well you communicate with patients doesn't just come down to your frontline patient support team. It includes your online information, social media presence, frontline support team, and every written or vocal way that your patient might interact with your brand.



67% prefer self-service channels



40% of consumers contact call center after using self-service channels

- [67% of consumers](#) would prefer to find answers through self-service channels over contacting patient support. Address how easy your self-service channels are to find and how easy it is for your patients to execute based on those channels. Do you have an easy to find and navigate FAQ page? Are your social media managers able to respond to questions online quickly and effectively?

- No one trusts a robot, right? Evaluate how personal or impersonal your support staff is when interacting with your patients. Are your patient service reps enthusiastic, energetic, and excited to help your patients, or are they just going through the motions?

- Remember that your frontline patient support representatives aren't always actually the frontline. [40% of consumers](#) contact a call center after they've already looked for answers themselves via self-service channels.

- Optimize your online search results for your patients. Track what words your patients are using to search for answers and optimize your website accordingly. Your website isn't a person, so there will be times when your patient has to dig to find what they're really looking for. Make it easier on them by offering suggested articles and resources on your self-service pages to make the dig more effortless.

- Imitate the “suggested results” principle on your live channels. Make sure your patient support representatives are listening and asking your patients questions so they can provide additional support or resources when your patients do contact live support.

Part of creating an effortless experience for your patient is enabling them to find answers to their questions and solve their own problems. This all comes down to how well you’re educating your patients.



EDUCATION

Part of creating an effortless experience for patient is enabling them to find answers to their questions and solve their own problems. This all comes down to how well you’re educating your patients.

When you provide your patients with useful and easy-to-find information that helps them solve problems and helps them use your products well, you give them the information they need to trust your brand.

The more you empower your patient through education, the more likely it is that they won’t have to call your patient service representatives in the first place.

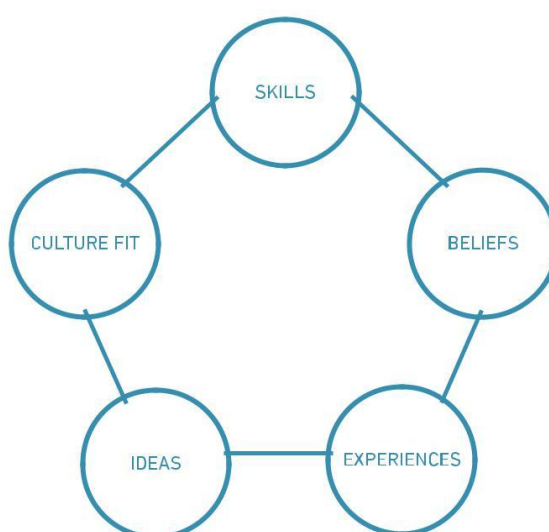
- Create educational materials for common troubleshooting problems that are easily accessible from your help center.
- Be a research-center for your patient. Use your blog to provide useful industry-related information and make it easy for your patients to find ebooks, white papers, and tools to give them the knowledge they need to need to be successful. (This also helps you attract patients, double win!)
- No matter the educational material you're creating, always keep in mind the effortless factor. Are your educational materials easy to understand and to execute on? If not, you'll have a communication issue.

EMPOWER YOUR TEAM TO PROVIDE EXCEPTIONAL PATIENT SERVICE

In the previous section, we discussed the need for your brand to communicate effectively with your patients in order to build trust. This is a part of providing good patient service.

When it comes to the details of actually empowering your employees to provide excellent service, it's not enough to just tell your employees what to do. At Indigo Medical Consulting, we believe that providing excellent patient services comes down to who you hire and how you train and treat your employees.

How do you create a practice culture that's focused on providing excellent Patient service? You start with your **hiring methodology**.



Culture Fit - Above all else, make hiring decisions based off of how well the prospective employee fits in with your culture. Someone might have a world of experience that your practice could really use, but if they're not a good work culture fit, they'll be unhappy, their co-workers will be unhappy, or both. Bad culture fit leads to employee turnover, so prioritize it!

Skills - Culture fit isn't everything either. Hiring a team with a variety of skills they can each bring to the table is essential. We often look for employees who have a high quality secondary skill as well, something they can bring to the role that others can't. They can then share this knowledge with others on the team, elevating the entire team.

Beliefs - How do your employees think companies should operate? How do they think patients should be treated? What are the goals they want to achieve in any job? Finding out what your patients believe helps you determine if they are a culture fit for your practice. It also gives you a sense of how they'll operate in the day-to-day execution of the job.

Ideas - Skills are crucial, but so are the ideas someone can bring to your practice. If a prospective employee has minimal skills but brings a lot of ideas, you may decide it's worth coaching that employee to develop their skills. Energetic employees with lots of ideas are more likely to have the motivation you need in a team.

Experiences - What kinds of experiences do your prospective employees have from their educational backgrounds and previous jobs? Have they only worked in companies that are vastly different from yours? Is this a good or a bad thing for the job you're hiring them for? Keep in mind that a well-developed team is one that can bring lots of different experiences to the table and use those experiences to innovate.

No matter how awesome your employees are, everyone still needs to be coached. That's why it's important to set up guidelines for successful Patient service.



① EDUCATE, AND EMPOWER YOUR TEAM MEMBERS

Treating your employees well goes a long way towards helping them provide excellent patient service to your patients. Give them agency; give them your trust.

- Help your employees strive for excellence by developing a set of principles that tells them what excellence means for your practice.
- Allow your team members' personalities to shine through on the job. People aren't robots, so don't expect them to be at work. When you encourage employees to be themselves in a professional way, you'll show them that you trust them enough to make good decisions.
- Invest in new-hire and ongoing training and mentoring.
- Educate by doing, not lecturing. People don't really learn via presentation. Don't expect them to. Coach your employees and allow them to grow into a job by giving them the opportunities to do so.
- Share stories of what great patient service resembles in your practice.
- Focus on autonomy. Once you've educated your employees on what your practice goals for excellence are, allow them to demonstrate it by setting them free.
- Prioritize feedback and recognition.



EMPHASIZE LISTENING TO PATIENT NEEDS

No matter the reason a patient is speaking to an employee, the key to excellent service is listening first and only responding after the patient knows you've understood their complaint or request.

- Allow your employees to go off script. Empower them to personalize each Patient support conversation to the Patient. When your employees have to stick to a script, it creates a situation in which they have the same monotonous, conversations over and over again. It also probably annoys your Patient, who can tell they're sticking to a script instead of really listening.
- Encourage your employees to pay attention to the tone of the conversation. Does the Patient sound confused, angry, nervous, frustrated, or bored?

- Emphasize asking questions before talking. Has the patient already tried to solve their problem through self-service? How many channels has the patient been through before they reached the patient service representative's ear? How many times has the Patient had to call or come in before? Find out about the patient's experience thus far so your patient support team can prevent repeating themselves and sending your patient in circles.
- Understand your patient's ability level. Can your products be difficult to navigate for some and easy for others? patients shouldn't all be treated as if they're all on the same playing field. Encourage your employees to figure out where the patient stands and help them navigate how to talk to patients at different levels.
- Encourage empathy. patient service support reps should sound like they understand and feel for the patient's difficulties. Having unempathetic or annoyed Patient service representatives looks bad for your brand and discourages healthy patient communication.



3 FOCUS ON SERVING YOUR PATIENTS

Emphasize the need for your patients to always come first. If your team members know the expectation is excellent Patient service from the get go, they'll likely empower each other to always solve for the Patient.

- Everyone at your practice should be able to identify a Patient by their [persona](#). Who is your patient? Why are they using your product? What are their pain points? Knowing this information helps your team personalize each Patient support conversation to the Patient and ultimately helps your Patient be better served by your team.
- Serve your patients with educational content and easy-to-navigate patient service channels. Everything your practice produces should be patient-centric.
- Follow-Up. Did your patient still seem confused or unsure at the end of a patient support interaction? Encourage your patient service representatives to follow up with the patients to make sure everything is squared away.

REDUCE THE NEED FOR CONTEXT-SWITCHING

Now that your team is empowered and ready to consistently provide excellent person-to-person Patient service, it's time to think more about the channels through which patients are actually interacting with your practice.

It's easy to talk about patient service as if the only time patients interact with your brand is through face-to-face contact, but the reality is that patient service is so much more than that now. **Patient service has expanded to phone services, e-mail exchanges, live-chats, and social media interactions. Even your website is considered part of your patient service.**

How do you make sure you're providing an effortless experience for your patient across all of these different channels?

You innovate to reduce the effort it takes for your patients to go through each patient service channel to find what they're looking for.

Your goal when creating an effortless experience is to think through your patient service pipeline and reduce the need for context-switching.

Say your patient has a question relating to your services. Neither your website nor your patient service hotline is readily available, so they decide to Google your website. They come to your website, but your FAQ section is difficult to find. When they finally find it, they don't get the answer they're looking for, so they have to search again to find your patient service hotline. Then, once they get to your patient service hotline, they have to go through a series of extension codes just to speak to someone directly. When they speak to someone directly, they're directed to the right person to help solve their problem and are given the phone number of who to call.

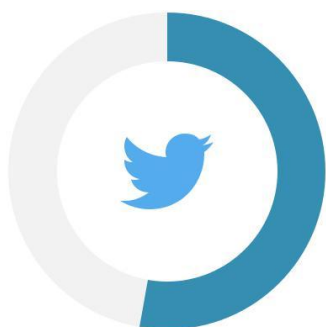
Think about how much effort that takes!

Your goal when creating an effortless experience is to think through your patient service pipeline and reduce the need for context-switching.

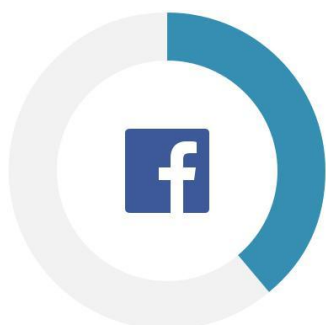
Maybe your FAQ section can't list every single potential problem your patients might have, but you can implement a live-chat feature that allows your Patient to chat directly with a patient service rep about their problem.

EMBEDDABLES

(Want to find a way to create a live chat for your Patient service reps and host it directly on your website? [Check out Zendesk embeddables!](#))



*53% expect response
in 2 hrs or less*



*39% expect response
in 2 hrs or less*

Maybe there will be times when your patient does have to call to speak directly with a patient service representative, but instead of having a phone hotline that sends your patients in circles, you could invest in more training for your patient service reps. There will, of course, be times when your patients are forced to switch contexts to ease their problems. The more you can work towards eliminating your patients' efforts to get the service they need, the more likely it is that your patients will stick around.

So what [kinds of channels](#) should you offer?

Social media - [53% of Twitter users](#) and [39% of Facebook users](#) expect companies to respond to complaints or questions within 2 hours or less. This means to effectively manage your social media channels and meet your patients' expectations, You should have a nominated staff member or outsourced company monitoring your Twitter and Facebook accounts for patient feedback

Don't forget about lesser known social media. While more and more users are taking to Twitter to voice direct complaints to patients, you can't neglect sites like Yelp, Yellow Pages and industry-specific review sites when monitoring your Patient complaints.

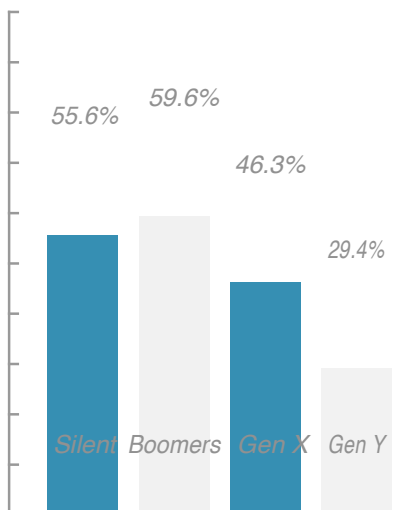


Email - Some users will want to email your practice directly to voice a complaint. It's important to have a generic practice email alias setup that allows your patients to uncategorically contact your practice. Make sure you have someone monitoring this alias so they can direct various emails to the right people and get your patients' questions answered.



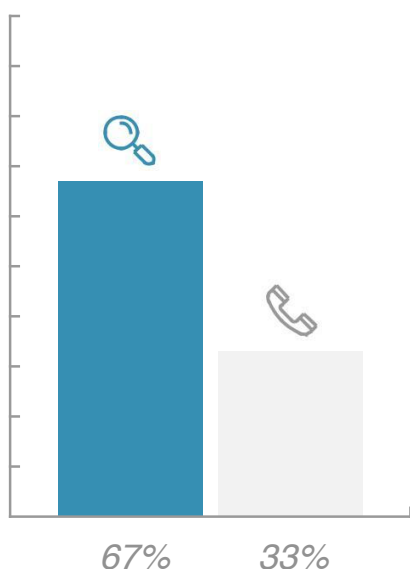
Phone - Phone support is still the [#1 channel preference for every generation](#) except millennials. Why? [Time efficiency and human interaction](#) makes all the difference. So what are some best practices for creating an effortless phone support channel for your patients?

Phone support channel preference



Minimize the amount of time patients are on-hold. Make sure you hire enough support staff so that your patients aren't waiting [more than 2 minutes](#). You should also give your employees enough agency to answer questions without them having to put your patients on hold to ask their manager a question.

Use a phone system designed for the [effortless experience](#)! When patients call after hours, your phone system should immediately cut to voicemail. It should also have automatic call routing so that your incoming calls are always routing to the representatives who are free to prevent hold time.



Make sure to have a well-developed FAQ section on your website that not only provides helpful content you think your patients might need but is also tailored to your patients' needs over time. Keep track of what words your users are searching for on your website and tailor your FAQ section accordingly.

Don't forget to add suggested pages at the end of each FAQ to keep your patients from having to dig too hard on your website.

If you want to make your FAQ pages really effortless, try installing a live chat feature so that your patients can ask your support team questions via instant message instead of having to switch channels and make a direct call. Looking for a great live chat tool? [Try Zopim by Zendesk.](#)

BALANCE QUALITY AND SPEED

The only guarantee in patient service is that at some point, your patients will have problems. How you handle those problems when they happen, however, is crucial.



*82% say speed is
number one factor*

82% of consumers say the number one factor that leads to great patient service experience is having issues resolved quickly.

Let's say a patient calls to troubleshoot for a problem they're having with your product. You've told your team that their goal is to solve problems for the patient as quickly as possible to reduce the irritation it brings Patients to be dealing with an issue for too long.



*22% of repeated calls
are related to first call*

Here's the catch: according a study by the CEB, 22% of repeated calls to patient service were related to the first call that was made. That means that roughly 1 in 5 Patients will have to call a second time for a related issue.

Instead of just focusing on managing patient service problems quickly, make sure your team is equipped to educate the patient about potential future problems.

The biggest cause of excessive patient effort is the need to call back. When creating an effortless experience, it's important to focus not just on the speed of your patient service interactions but also on the quality of them.

USE PATIENT FEEDBACK FOR IMPROVEMENT

There are tons of channels through which your patients can contact you. The key to responding to patient feedback and using it to your advantage is by managing all of those channels effectively based on your patients' needs.

It's inevitable that you'll receive complaints, concerns, or suggestions from your patients. **Instead of thinking of patient feedback as an inevitable bother, think of it as a [gift](#).**

When your patients give you feedback or send in a complaint, remember that they are giving you feedback so that you'll improve. After all, and the way that you innovate is by using patient feedback to your advantage.

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How to Use Social Media Complaints to Improve Your patient Experience



*50% have used
social media to
voice complaint*

As of 2014, one in five consumers say they've utilized social media to get a patient service response. Of those consumers, 50% have used social to vent their frustrations or voice complaints.

This means that monitoring your social media accounts isn't just good patient service practice: it's a necessity.

How do you manage patient feedback via social media and use it effectively?

①

FIND OUT WHERE YOUR PATIENTS ARE

The key to interacting with your patients on social media is to know your audience. Do your patients prefer to interact with your brand on Facebook, Twitter, or another site? Don't miss an opportunity to interact with your patients by not knowing where your patients want to interact with you.

②

TRACK AND ANALYZE YOUR SOCIAL MEDIA FEEDBACK

Where are your patients mostly likely to post negative feedback? At what time of day are consumers most likely to contact your social media presence? Figuring out this kind of data will help your team figure out how to manage your feedback most effectively.

③

FIGURE OUT WHAT REQUIRES RESPONSE, AND ACT QUICKLY!

As we mentioned, most people on social media expect an answer to their comment quickly, within a few hours! While this might be difficult to manage all of the time, you need to respond as you can.

Looking for a better way to keep track of your social media feedback? [Try HubSpot's Social Inbox.](#)

USE (THE RIGHT) DATA TO DRIVE PATIENT SERVICE

You've put all of this work into creating an effortless patient experience, but how will you measure the effects of your efforts?

It's always important to use data to track your progress within the business, and patient service is no exception. Make sure to use these 10 metrics for tracking and [improving your patient service](#).

New Tickets - Knowing how many tickets your team is handling at one time is incredibly important for planning how to manage and grow your patient support team.

Submission Method - To manage across your support channels, you have to know which channels your patients are using most frequently. This will help you work towards effortlessness by managing and optimizing those channels your patients use most often.

Tickets Solved - In order to assess how effectively your team is managing the requests coming in each week, you need to find out if you are solving problems at the same rate. If you're continually behind on the number of tickets solved versus the number coming in, chances are it's affecting your patients' experiences.

Reply - Measured by the time it takes for your team to acknowledge a request once it has been received.

Most patients will want an immediate acknowledgement of their request with a follow up to tell them how long it will take to fix the problem.

Resolution Time - Tells you how long it takes between the time a request was sent and the time a request was solved. If this average time starts growing, you likely need to solve training problems among your team members.

Backlog - When the number of tickets solved consistently falls short of the number of new tickets you receive, you create a backlog. If week after week you fall short of solving your new tickets, you'll gradually have to put every new request on the backburner to get through your backlog. Try to keep your backlog as low as possible by solving your new tickets quickly.

Predicted Backlog - A predicted measure of how long it will take to fill all of your backlog requests. You can use this measure both to evaluate your team and keep your Patients informed on their wait time.

Ticket Distribution - Are you getting more one-touch tickets or multi-touch tickets? The more times your Patient has to re-contact, the more excessive their effort is. If you're getting an influx of multi-touch tickets, you need to do some investigating.

Satisfaction Ratings - You always want to make sure to ask your patients to evaluate their satisfaction with your business. This measure will give you a definitive answer on how well your brand is doing at satisfying your patients during their regular interactions with you. It will also help you see your improvements in creating an effortless experience over time.

Individual Performance - To effectively manage and coach a team, you always need benchmarks on how well each team member is doing. You can segment any of the above stats by individual support representative. This allows you to see who your top performers are and how the work is being distributed among your team members.

Here are four important stats to use to measure individual performance:



- Satisfaction Score



- Response Rate



- Average Resolution Time



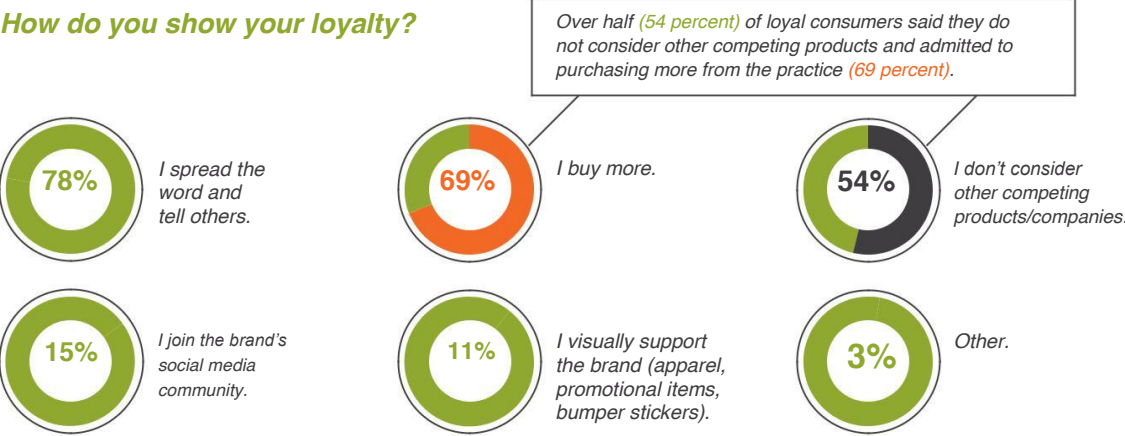
- Individual Representative Backlog

Want more information from Zendesk on using these metrics to improve your Patient service? [Click here.](#)

CONCLUSION

Satisfying your patients throughout all of your practice’s daily functions is hard work, no doubt about it. The good news is that it does pay off.

When patients trust brands and like the products they are getting, they are loyal. What can loyal patients do for you?



Satisfied, loyal patients are more likely to tell their friends and family about your brand, to buy more from your brand, to avoid your competitors, and promote your brand more often through social media and brand swag.

These are all good things that you should want for your practice, right?

At this point, you should be convinced that excellent Patient service is key to getting loyal patients. Now, go forth and use these tips to start working toward an effortless Patient experience for your brand today.

HUBSPOT SOCIAL INBOX

FOCUS ON WHAT MATTERS

You want to know what your patients and leads are saying about you on social media. But how do you know who's who? HubSpot's Social Inbox plugs into your contacts database, color-codes your patients and leads, helps you prioritize your engagement, and delivers real social ROI.



PRIORITIZED SOCIAL ENGAGEMENT

Spend more time connecting with the people that matter to your business. HubSpot's Social Inbox shows you social activity on your connected accounts or published content.



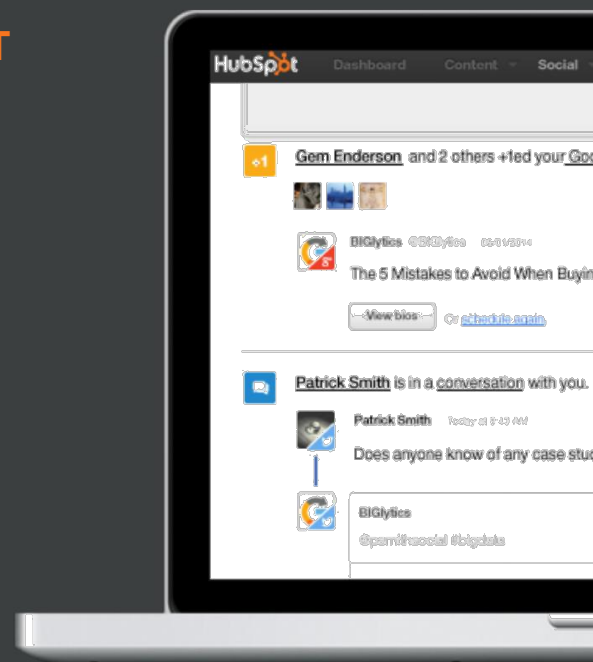
BETTER SOCIAL MONITORING

Through color-coding and prioritized streams of your patients and contacts, HubSpot shows you which Twitter mentions are most important to your business.



SMARTER SOCIAL PUBLISHING

Don't batch and blast. HubSpot's social media publishing helps you become smarter about the way you schedule and publish content on social media.



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