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# Plan for Attracting New Pts



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## Plan for Attracting New Patients

One of the biggest problems for new practices is attracting sufficient new patients to achieve the growth necessary for practice success. The book “What Patients Want” contains a unique *Plan for Attracting New Patients*, utilising the methods described in the book.

“Where you start is not as important as where you finish.”

Author Zig Ziglar

While not being a complete plan for every situation, this is a practical check-box style worksheet that can be completed to suit the needs of an individual optometry practice.

Like the other resources and suggestions for the development of an optometry practice, the *Plan for Attracting New Patients* will only be valuable if it is adopted.

There is also a form that has been used by the author as a *Growth Plan Worksheet* in the *Resources* section of the book.

Growth Plan Worksheet				
1: SITUATION ANALYSIS			Req	Done
• <b>Laws &amp; Regulations:</b>			<input type="checkbox"/>	<input type="checkbox"/>
• <b>Economic Conditions:</b>	Interest Rate	%	<input type="checkbox"/>	<input type="checkbox"/>
	Inflation Rate	%	<input type="checkbox"/>	<input type="checkbox"/>
	Wage Increases	%	<input type="checkbox"/>	<input type="checkbox"/>
• <b>Availability of Technology:</b>			<input type="checkbox"/>	<input type="checkbox"/>
• <b>Availability of Media:</b>	<input type="checkbox"/> Newspapers	<input type="checkbox"/> Directories	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Television	<input type="checkbox"/> Magazines	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Radio	<input type="checkbox"/> Letter Drop	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
• <b>Trends in Consumer Demand:</b>			<input type="checkbox"/>	<input type="checkbox"/>
Products or Services becoming more popular . . .				
Products or Services becoming less popular . . .				
• <b>Support Offered by Suppliers:</b>			<input type="checkbox"/>	<input type="checkbox"/>
Marketing & advertising co-op subsidies . . .				
Staff training support . . .				
Specialty products & exclusive agencies . . .				

*Growth Plan Worksheet*  
(A Hanks)

Plan for Attracting New Patients				
Practice Location or Branch:				
Mentor:				
<b>FOUNDATIONS:</b>				
Start Date:				
	Required	Completed	Details / Comment	
Introduce chapter "Attracting New Patients" (see )	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Identify the key contact for the project	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<b>1 - STANDARD PATIENT LETTERS:</b>				
	Required	Completed	Details / Comment	
Change the standard Recall Letter to include social proof	<input type="checkbox"/>	<input type="checkbox"/>		
Change the patient Survey Letter to invite referrals	<input type="checkbox"/>	<input type="checkbox"/>		
<b>2 - ONGOING PATIENT CONTACT:</b>				
	Required	Completed	Details / Comment	
Introduce the process for producing 12 month Service Recalls	<input type="checkbox"/>	<input type="checkbox"/>		
Introduce the process for making Progressive Lens follow-up calls	<input type="checkbox"/>	<input type="checkbox"/>		
<b>3 - ADVERTISING:</b>				
	Required	Completed	Details / Comment	
Full review of the current schedule of ongoing advertising	<input type="checkbox"/>	<input type="checkbox"/>	Spend pa: \$ _____	Sales pa: \$ _____ %
Introduce the process for making Progressive Lens follow-up calls	<input type="checkbox"/>	<input type="checkbox"/>		
<b>4 - SPECTACLE DELIVERIES:</b>				
	Required	Completed	Details / Comment	
Design contents of bag to be given with each new spectacle delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Thanks for recommending us <input type="checkbox"/> Adaptation & guarantee <input type="checkbox"/> Cleaning cloth <input type="checkbox"/> Cleaning spray <input type="checkbox"/> other:	
Audit that contents of spectacle delivery bag is happening	<input type="checkbox"/>	<input type="checkbox"/>		

*Plan for Attracting New Patients*  
(A Hanks)

Plan for Attracting New Patients				
Practice Location or Branch:				
Mentor:				
<b>FOUNDATIONS:</b>				
Start Date:				
	Required	Completed	Details / Comment	
Introduce chapter "Attracting New Patients" (see <a href="#">page 149</a> )	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Identify the key contact for the project	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<b>1 - STANDARD PATIENT LETTERS:</b>				
	Required	Completed	Details / Comment	
Change the standard Recall Letter to include social proof	<input type="checkbox"/>	<input type="checkbox"/>		
Change the patient Survey Letter to invite referrals	<input type="checkbox"/>	<input type="checkbox"/>		
<b>2 - ONGOING PATIENT CONTACT:</b>				
	Required	Completed	Details / Comment	
Introduce the process for producing 12 month Service Recalls	<input type="checkbox"/>	<input type="checkbox"/>		
Introduce the process for making Progressive Lens follow-up calls	<input type="checkbox"/>	<input type="checkbox"/>		
<b>3 - ADVERTISING:</b>				
	Required	Completed	Details / Comment	
Full review of the current schedule of ongoing advertising	<input type="checkbox"/>	<input type="checkbox"/>	Spend pa: \$ _____	_____ %
			Sales pa: \$ _____	
Introduce the process for making Progressive Lens follow-up calls	<input type="checkbox"/>	<input type="checkbox"/>		
<b>4 - SPECTACLE DELIVERIES:</b>				
	Required	Completed	Details / Comment	
Design contents of bag to be given with each new spectacle delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Thanks for recommending us <input type="checkbox"/> Adaptation & guarantee <input type="checkbox"/> Cleaning cloth <input type="checkbox"/> Cleaning spray <input type="checkbox"/> other:	
Audit that contents of spectacle delivery bag is happening	<input type="checkbox"/>	<input type="checkbox"/>		

5 - PRINTED MATERIALS:			
	Required	Completed	Details / Comment
Introduce giving brochure to every patient at end of every consultation	<input type="checkbox"/>	<input type="checkbox"/>	
Order a specific number of brochures and note when expected to restock	<input type="checkbox"/>	<input type="checkbox"/>	Number ordered:
		<input type="checkbox"/>	Expected Restock: (Date)
		<input type="checkbox"/>	Restock Confirmed: (Date)
6 - SAMPLES FOR LOCAL BUSINESSES:			
	Required	Completed	Details / Comment
Design the bag contents	<input type="checkbox"/>	<input type="checkbox"/>	
Bag distribution 1	<input type="checkbox"/>	<input type="checkbox"/>	(Number) (Due date)
Bag distribution 2	<input type="checkbox"/>	<input type="checkbox"/>	(Number) (Due date)
Bag distribution 3	<input type="checkbox"/>	<input type="checkbox"/>	(Number) (Due date)
7 - LOCAL DOCTORS AS REFERRAL SOURCES:			
	Required	Completed	Details / Comment
Visits to Local Doctors 1	<input type="checkbox"/>	<input type="checkbox"/>	(Number) (Due date)
Visits to Local Doctors 2	<input type="checkbox"/>	<input type="checkbox"/>	(Number) (Due date)
Visits to Local Doctors 3	<input type="checkbox"/>	<input type="checkbox"/>	(Number) (Due date)
Introduce summary vision reports to routinely go to doctors	<input type="checkbox"/>	<input type="checkbox"/>	
Audit that these summary vision reports are routinely being done	<input type="checkbox"/>	<input type="checkbox"/>	
8 - COMMUNITY INVOLVEMENT:			
	Required	Completed	Details / Comment
Identify groups that optometrist would like to get involved with	<input type="checkbox"/>	<input type="checkbox"/>	
Set an annual budget for optom's community involvement	<input type="checkbox"/>	<input type="checkbox"/>	

## 9 - TALKS ABOUT EYECARE:

	Required	Completed	Details / Comment	
Develop a topic and content suitable for community eyecare talks	<input type="checkbox"/>	<input type="checkbox"/>		
Offer talks about eyecare to local community groups	<input type="checkbox"/>	<input type="checkbox"/>	<i>(Number)</i>	<i>(Due date)</i>
Monitor bookings made for community eyecare talks	<input type="checkbox"/>	<input type="checkbox"/>		