



This letter was part of an Informative Email Newsletter series written on behalf of a marketing client specializing in medical and dental offices. The series ran twice during the year and consisted of 12 letters regarding how offices can boost their leads.

TRAINING YOUR COUNSELORS FOR MAXIMUM CONVERSION

Have your patients ever been surprised to learn their procedure would cost more than they expected? Have you heard complaints from patients that thought they would be able to see like they were 25 again? I have, but you can prevent this from happening at your practice by thoroughly training your counselors.

Ensuring your patients are given the care they need, are well informed about their choices, and walk away satisfied with their results is the best way to maximize your conversion rates as they sing your praises to their friends and relatives. This role is usually taken up by the surgical counselor.

The significance of the counselor

Your surgical counselor is usually the key person in charge of discussing and converting premium IOLs and other services with patients. Your counselor is the primary person helping your patients determine which treatment options best match their needs, budget and outcome expectations. Thus, the surgical counselor plays a significant role in your patient's satisfaction levels and your program's success or failure.

A [study conducted in the early 1990s](#) followed 124 physician offices in multiple states to examine the relationship between physician and patient communications. The study examined primary care physicians and surgical practices and discovered a strong link between the amount of time physicians and their staff spent with their patients and the frequency of malpractice claims. What they learned was patients felt negatively toward practices in which they felt hurried or ignored. Employing a well-trained surgical counselor reinforces the idea to your entire staff the importance of taking the time to listen to patients and fully addressing their concerns.

The counselor's job

It is the counselor's job to properly educate and set realistic expectations for the patient. By the time the patient reaches the surgeon, he or she should be already be well educated on his or her options, the projected expense, and realistic outcomes and risks. Given the importance of this role, it is imperative that your counselor is well-trained not just in the procedures available, but also regarding how to work with patients.

Evaluation

Several years ago, I was visiting a practice dealing with a very unhappy patient. Although she'd received excellent treatment with stellar results, she was angry because the practice had not informed her about premium IOL surgery. She was a good candidate for the procedure, but hadn't been offered it simply because the doctor had never bothered to evaluate her for it.

While it is true that lens selection can be challenging, patients should always be presented with all of their available options. Your surgical counselor should be trained to ensure these options have been fully presented and discussed.

Improving communications

To ensure you are appropriately meeting your patient's needs, you can have your patients complete a patient survey to determine their needs, desires, and lifestyle to help guide them through their choices. Review each patient surgery, review the cataract exam, determine candidacy, and discuss options with the patient giving them ample opportunity to ask questions. By giving them some material before their appointment and having them fill out the survey, you are providing them with the opportunity to formulate questions and feel more fully informed.

Following the counseling appointment, you can have patients sign a waiver that explains you have discussed their candidacy for various procedures and they have opted to waive any upgrades.

Set reasonable expectations

Finally, it is up to your surgical counselor to ensure your patients have reasonable expectations regarding surgical outcomes. Do not make promises based on most ideal cases in the event that your patient only achieves average results. If instead they are set up to expect average results and achieve ideal outcomes, they will be that much more satisfied.

If the doctor (or staff) takes the time to explain all of the appropriate options for your patient, the benefits and drawbacks of the service and to answer any questions the patient might have, you will find a much higher satisfaction rate amongst your patients.