

# Referral Tracking Board

Materials needed: Large posterboard, large poster size paper, or white board with pens.  
 Cost: \$2 to \$50  
 Time Commitment: 30 minutes per week - ongoing activity - Follow up may be 1 hour per week out of the office.  
 Who does it?: Staff person  
 Purpose: Farm referral sources efficiently and consistently  
 Goals: Cultivate referrers and eliminate non-referrers

Have a large board to list the name of specific referral people or sources such as attorneys, clergy, gyms, MDs, dentists, etc. Behind each name across the board have 12 to 21 columns listed by week.

	1/5	1/12	1/19	1/26	2/2	2/9	2/16	2/23	3/2	3/9	3/16	3/23
James Brown, Atty	X	Rep			C-G		X	Rep	X	Rep		
David Smith, M.D.	G			X	Rep			G		C		
Father Sierra			C			G				X	Rep	

Across the board, in the column for each week, If the referral source sends a referral put an X or a number in the column for each referral sent that week. When a follow-up report or thank you is sent or called put R or Rep in the proper box. When a call either by phone or in person is made for any other purpose put a C in the box. When a gift, or other token of appreciation is given put a G in the box.

To productively use this system the doctor or a senior staff person should contact each referrer a minimum of once a month. Initial contact should be by phone, with a scheduled meeting within a few days thereafter, a followup thank you letter and acknowledgment of the conversation and a followup call within 2 weeks after that to check of memory joggers to ask for referrals.

Don't let a referrer go more than 4 weeks without a referral to your or a call from you to them. Keeping in their mind is the goal and a must activity to make this successful. Out of sight = out of mind does apply. You may not be in their sight but you must make sure you stay in their mind. Don't just send letters or brochures. DO CALL and send them some helpful brochure you discuss with them. Keep a record or have an established schedule of first call = topic #1, 2<sup>nd</sup> call = topic #2, etc.

Motivation: The referrer will gain an understanding of how you can help their source of people. The point is to make them the hero in some way by showing how it will enhance their image or ability to help their people. Be specific as to the types of cases you can help them with and how you can help them. The followup and gift become highly motivating to many individuals even when low cost. The gift doesn't have to be immediately, just consistently sent.

List Generation: Start by listing those individual you already know who are or can become referral sources for you. Then look for referral sources associated with existing happy patients. Then start adding categories of referrers and calling individuals on the list. Make an appointment to meet them about your services and how it can help them and their people. If they agree after the first meeting put them on the list and followup as discussed.

Future Activity: Work at adding 1 or 2 new names each week until you have a manageable list on the board (15 to 20 names). Then track them, weed out the non-referrers and add new names to fill in the blanks. A good referrer should be able to refer a NP to you at least every other month. That's 4 to 5 NP per month for about 2 hours of time per month.

Extras: If your associate finds and works the associate they get the NPs. If a staff does the NPs go on rotation to multiple doctors and the staff gets a bonus.