

## Revenue is Walking Out the Door: The Sage Portal Can Help Capture It

*By Paul C. Seel MD, M.B.A.*

Patients with unmet refractive and optical needs are walking through your clinic and out the door every day. The sooner you're able to utilize the information collected by the Sage Portal, the sooner you can satisfy those unmet needs and realize that lost revenue. You've recently instituted a plan to drive patient adoption of New Patient Registration (NPR) and now you're ready to use the life style information to capture those sales.

The life style questions embedded within the Sage NPR identify a patient's needs in advance of his or her appointment. Understanding those needs before the appointment gives you a leg up on your competition. Ignoring this potentially wastes that opportunity. The specifics of how to utilize this information will differ within each clinic, but the major principles that follow apply across the board. First, gather the information to identify unmet needs with the life style questions in NPR. Driving NPR adoption ties into this. The more patients that complete NPR, the more unmet needs get identified. Second, provide the names of those patients and their needs to the appropriate supervisor prior to their appointments. Third, assign that staff person with accountability to fine tune the series of actions to facilitate sales. This series of events or visit plan is specific for each product or procedure, consisting of a series of educational materials about the topic, alternatives, office discussion and recommendations. Fourth, track results to determine what works and what doesn't. This leads to a continuous quality improvement (CQI) loop to fine tune this process.

Let's walk through an example. A woman completes her NPR on-line on Monday for a Wednesday appointment. She is unhappy about wearing contact lenses and is interested in refractive surgery. The information is forwarded to the refractive coordinator in advance of the appointment. The coordinator electronically sends the patient a brochure and a list of frequently asked questions on refractive surgery. Time is reserved during her appointment to meet the coordinator and discuss surgery. The patient's physician as well is alerted and has the opportunity to weigh in. A formal evaluation could also be done, if appropriate, during that visit. The end result is that with advance understanding of this desire, enabled by NPR, and a visit plan, this patient has received all of the information she needs to make her decision, met the appropriate staff and had the opportunity to ask questions. She understands the procedure and why it should be done at this clinic. And all this has happened after just one visit.

Now let's look at what might happen to a similar patient at a clinic not using NPR. As before, the woman mentions her interest in refractive surgery however in this example the clinic didn't have advance notice. At the time she learns of this patient's interest, the refractive coordinator is busy with someone else. She can't meet with the patient, but arranges for her to receive a brochure and instructions to call back later in the week to set up follow up.

This patient may or may not proceed with refractive surgery with her eyecare provider. A lot has been left to factors beyond the clinic's control which raises several questions. Is the patient more or less likely to read the brochure after her appointment or before? Will she call the coordinator or do her efforts fail due to procrastination, distraction or phone tag? Is momentum lost without the personal touch of actually meeting the coordinator? In the interim, will she be influenced by the ad of a low cost LASIK provider? Why should she proceed with her current eye care providers? The physician and refractive coordinator never had the opportunity to make their case. Without other criteria, she may default to price. The latter scenario is unfortunate. Not only is a refractive surgery case potentially lost, but with it the patient's ongoing care as well.

In summary, the Sage NPR collects life style information that can be utilized to drive sales that would otherwise go unmet. Collect this information, provide it to the appropriate coordinator prior to the appointment, and initiate a series of actions or a visit plan providing specific education. A similar process works for patients in need of new high end or designer spectacles, the latest contact lens innovation or a premium IOL.

Satisfying your patient's wants and needs is not selling, it's an obligation. It's simply a matter of establishing a system. Now that systems are in place for adoption and utilization, a CQI process will provide a framework to tweak the system maximizing the benefits. Learn more about CQI in the companion article, "A Quick Primer on Continuous Quality Improvement".

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