



Case Study #4:

Streamlining Best Practices & Growing Practice Case Volume | Client: Confidential

Problem:

A small private plastic surgery practice had gone through some personnel changes, resulting in disorganization, duties falling through the cracks, a decline in the level of customer service provided to existing and potential patients, and a decrease in revenues. I was tasked with evaluating and analyzing the practice from top to bottom, reorganizing staff and reassigning duties as necessary, straightening out the financials, and implementing marketing and public relations strategies to increase lead generation, lead conversion, and ultimately grow revenues. The project time table was six months in length.

Action:

I began by meeting with the plastic surgeon in order to understand the concerns and priorities. Next, I met with the entire staff and began building a rapport and bridge for good communication. I assessed each person's role, their strengths and weaknesses, and their personal desire for the types of duties and roles they felt would be most fulfilling. The staff felt that there was no real structure to the organization and no accountability. I produced and implemented an Employee Policies and Procedures Handbook, providing and setting company policies which not only provided structure and communicated expectations of performance to the employees, but also protected the client from potential issues moving forward with the Texas Workforce Commission.

I quickly reviewed the managed care contracts and reimbursement fees for specific CPT codes. It was determined that breast reduction surgery was the most profitable procedure performed within the practice, and as such, needed to be marketed heavily in order to increase those specific cases.

Additionally, I dove hard into the financials, uncovering many issues – including an issue with the IRS – as payroll taxes had not been filed in well over six months, resulting in a rather large tax debt. I contacted the IRS and went through the proper protocols in order to be allowed to negotiate with the IRS on the tax debt resolution issue on behalf of the surgeon. In the end, the original tax debt of \$11,000 was reduced to \$6,000, resulting in a significant savings to the practice.

The practice had two locations, with the secondary location lease coming due for renewal. I worked with the leasing company to renegotiate a decrease in the rent expense, and also had them agree to cover the phone and Internet connection expenses as part of the new lease. In an evaluation of the inventory on site, it was determined that too much had been ordered, so the overhead was too high. I worked with several vendors in order to return some product and to get invoices credited back. A formal inventory count and procedure policy was put in place, inventory was locked up and consistently counted, and reductions in overhead were realized.

Staff was evaluated, reorganized and cross-trained so that if anyone was out, others could easily cover. Upon evaluation, it was determined that some staff needed to go, as they were not happy in their job duties and were a negative influence on the practice. Fortunately, no one had to be terminated; rather, the unhappy staff members resigned graciously, allowing me the opportunity to rehire for the positions vacated.

I continued to hold weekly staff meetings to encourage and motivate the staff, and to emphasize the importance of customer service, and patients began reporting positively about their experiences via a customer service survey given at each office visit. I implemented a quarterly bonus pay incentive with the staff directly tied to the customer service survey results. Positive reviews began showing up on Internet review sites such as Yelp!, FourSquare, and Facebook. We began to see an increase in the number of patient referrals, resulting in an increase in surgery case volume and ancillary revenues related to skin care and aesthetic in-office procedures.

Once the staffing and financial issues were managed, it was time to implement additional marketing strategies, including public relations strategies and social media marketing strategies. I planned and executed two highly successful PR events: the first was an Open House to officially kick off the move into a new office near the Upper Kirby area of Houston; the second was a "Ladies Night Out." Both events were heavily attended and ancillary services were demonstrated and performed by various vendors during the event. Additionally, surgery and skin care consultations and appointments were scheduled during the event. At each event, attendees who checked in or "Liked" us on Facebook received a complimentary gift bag of skin care products which had been provided as a courtesy upon request from one of the vendors.

Additional social media marketing strategies were implemented as well. I began posting consistently to the company Facebook page in order to grow "Likes" and "Shares," and to build loyalty to the brand. I worked to identify keywords to ensure that the practice website was optimized, and additional copy was written in order to add content and to embed those keywords. I worked with the web design vendor and requested that they embed images on the back end with keywords as well, and identified backlinks to increase traffic to the website. An area to request an appointment was added, and generated an email that was directed to a specific staff member whose emphasis was on customer service and converting the inquiry to an in-office consultation. The expectation was set that any online inquiries would be responded to within four hours, if possible, but no later than the morning of the next business day.

Result:

- Increased cash sales over \$88K in a 6-month period by marketing complimentary revenue streams such as skin care products, laser skin treatments, Botox®, injectables, etc.
- Increased managed care revenues by 36% over a 6-month period by implementing improved patient intake processes and increasing sales for specific procedures
- Generated an additional \$46K in "on site event sales" by marketing two highly successful events
- Authored, proposed, and successfully implemented Employee Policies and Procedures Handbook which provided structure and set the standards of conduct for all employees; thereby providing protection for the client with TWC
- Surgeon's salary more than doubled during six month period of engagement