Customer Enchantment: Building Enduring Relationships with Referring Physicians (Sub-specialists)
Overview

As with most organizations, healthcare providers tend to focus on delivering the best service to their primary customers, for healthcare, this translates to quality care for patients. While certainly be a primary focus, it is also critical for growth that healthcare providers identify and meet the needs of another key customer group - referring physicians.

Referring physicians are a principle source for increased patient volume. These community physicians serve as a channel for patients to access health services at centers of excellence whether it is through a patient requested referral or physician initiated. In the whirl of activity of caring for and treating patients, it is the referring physician who is often neglected, unrecognized and underappreciated. However, we are now beginning to see more referral centers acknowledge the critical role of referring physicians in helping them build patient volume.

Your customers will have an experience at your institution whether it is strategically managed or not. It is up to your institution to purposefully design, develop and manage your various customer groups’ experiences in a manner that is reflective of your brand promise, aligns with your mission and internal culture. Ignoring the need to manage the referring physicians’ experience will result in lost opportunities for growth and revenue and run the risk of diverting potential business to your competitors.

Through the use of experience mapping, Gelb is able to evaluate the current referring physicians’ experience and shed light on a variety of stewards and touchpoints that form and affect their experience. Experience Mapping is an in-depth qualitative research technique that utilizes a visual cue (the experience map) to help patients, staff, physicians, and other influencers and customers recall specific episodes in their journey.
Benefits of Experience Mapping

Assessment of the Total Experience
• Expectations before their first encounter
• Activities and touchpoints
• Changes in attitudes, if any
• Richness of feedback and information from the voice of the customer

Provides a Framework for Action
• Experience stewards who are responsible for delivery, thus provide accountability
• Stewards can appreciate the relationship of their actions to the rest of the journey
• Interactions or “touchpoints” are categorized at each step

What We Know About Managing the Referring Physicians’ Experience (Sub-Specialists)

Having evaluated the referring physician experience for a myriad prominent healthcare institutions and academic medical centers, we have been able to identify themes in the kind of information and relationship referring physicians seek from the institutions to which they refer. Some of this seems to be conventional wisdom, but surprisingly few institutions take advantage of it. Referring physicians typically:

• Want and expect updates about the patients they refer in a form they find useful
• Seek a referral process that is straightforward and simple
• Have a specific reason for referring to a particular institution, which is usually known by that institution
• Want to be recognized for the relationship they have with their patients

However, we’ve learned through our years of work in experience management that not all needs are the same. The functional (process) and emotional (psychological) needs vary by physician and referral type just as they do for patient segments. Thus, the type of relationship, information, communication and rapport that a primary care provider desires likely differs from that of a specialist or sub-specialist.
Experience mapping allows us to pinpoint nuances and understand the circumstances for which these exist while reaping the relationship building benefits for our client institutions. This research technique also assists in identifying service improvements to transform dissatisfied or loyal customers into enchanted customers. Enchanted customers are those who form part of a provider’s cheering section and fan club.

**Loyal versus Enchanted Referring Physicians**

As previously mentioned, experience mapping enables us to identify basic needs, and understand current and ideal experiences that physicians may expect and/or want when referring patients. Some of these we referenced as conventional wisdoms about the referring physician experience that experience mapping assists in validating with the voice of the customer. What is not common knowledge, however, are the extra efforts that an institution can make to transform a referring physician who is satisfied and loyal into one who is a raving advocate and champion for the institution (an enchanted referring physician); thereby providing a steady stream of referrals.

A satisfied referring physician will refer again, ostensibly loyal. However, loyalty only translates into the following behaviors:

- Will recommend your institution, *if asked or prompted*
- Is unlikely to give you a second chance
- Has minimum investments in your institution’s future
- Views you as a choice among many

Having enchanted referring physicians is what all institutions should strive for. Enchanted customers or referring physicians are those who:

- **Go out of their way** to recommend you
- Forgive you for missteps
- Demonstrate a strong commitment
- Are part of your future and find ways to remain connected to your institution
Getting Started

Building an Experience Management Team

From the onset, the priority is to form a collaborative relationship and design a body of work that accurately captures physician needs for insight. This group will be the first to develop empathy and addresses pain points by developing. The experience management team is typically comprised of representatives from multiple functions from key internal departments who serve referring physicians and who can influence transformational change.

This team should access knowledge from across stakeholder groups about the current referring physician experience, resources that are available to referring physicians and any past research conducted. The main benefit and purpose for establishing is to give provide guidance and ownership transformation planning and implementation.

After an assessment of the current state and past insights, experience management team puts structures to identify the central areas of interest for further research.

Identifying the Right Target Sample

*Which sub-specialist groups to interview and how many for a representative sample?*

- Which sub-specialties receive the most referrals from physicians?
- Which sub-specialties are the most profitable?
- Which sub-specialties are engaged and support efforts behind managing your customers’ experience (including but not limited to referring physicians and patients)?

Customizing the Research

*Designing customized study materials and experience map*

- What are the steps in the current referring physician experience? (experience map)
- Do any differences exist among specialties or types of cases?
- What are the pain points referring physicians currently encounter and when?
- What, if any, seed ideas can you present that may improve or change their experience?

The experience management team then chooses the target referring physician groups and customizes the research plan to meet these objectives.

We also encourage conducting in depth interviews with faculty and staff from the chose sub-specialties to gain further insight on the referring physician experience. Conducting interviews with the institution’s faculty and staff highlights any gaps in what is perceived as the referring physician experience and identifies current internal barriers in delivering the ideal experience.
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Case Study with Cincinnati Children’s Hospital and Medical Center

Using experience mapping, Gelb Consulting was able to identify and evaluate the current referral experience for specialists who refer to four select practices at Cincinnati Children’s Hospital and Medical Center. The Cincinnati Children’s Hospital Experience Team was seeking to understand the experience of referring physicians in an effort to identify best practices and opportunities for operational improvement.

Some of the strategic questions we addressed included:

- Do referring specialists expect the same frequency/type of communication as primary care providers?
- How do specialists learn about our services and what factors determine repeat business?
- What process do specialists use to refer their patients? What are the barriers to that process?
- How can we improve the physician experience and which division(s) will be our “test of change”

By conducting in-depth interviews with referring specialists, we were able to assist the experience management team in identifying the ideal referral experience and designing an action plan for change to meet referring physicians’ needs. While referral volumes have increased, the organization has recognized the importance of further investment into building these referrals. Our work laid the foundation for a new business strategy that included a multi-million dollar promotional campaign.

Key Takeaways
- Developing direct relationships with specialists is key
  Establish rapport with referring physicians. Referring physicians do not typically expect to receive a phone call from a referral center physician. However, when they do, it establishes rapport and signals the beginning of transforming a loyal referrer to an enchanted one as they make note of the ‘above and beyond’ effort the other physician has made by calling or sending them a personal note or paying them a visit.
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- **Referring physicians want to be included in the care team and expect frequent communication**
  Referring physicians understand the hectic schedules physicians keep. However, the method and timing of communication regarding a patient should match the patients’ case. If an urgent matter, then a phone update would be most suitable and appreciated. In a situation like this — snail mail is less than acceptable. Fax or email would be satisfactory. Consulting with the referring physician about the patient they referred would also show professional courtesy and above all respect for the referring physician.

- **Communication needs to be consistent and predictable**
  For consistent referrals establish a level of high quality services and, in this case, communication with referring physicians. Expect more consistent referrals from a physician when your institutions’ communication with them sets the standard for consistency.

- **Streamlined referral processes are required**
  Jumping through hoops, reinventing the wheel or having to navigate a number of channels for a referral serve to discourage if not deters referrals all together. One or two main, well thought out and structured sources for physician referrals remove the guesswork and effort for referring physicians and their support staff. Best practice hospitals usually have an online referral system and/or telephone line for physician referrals.

- **Referring providers want to learn about other services available**
  Knowledge is power. Empower physicians with knowledge about specialties, new programs, services and developments at your institution. Too often we are told by referring physicians that they would refer more to a specific institution if they only knew what other services, specialties or technologies were available. Customizing the communication to meet their information needs also makes a significant difference and impression.

- **Coordination of transition care mandatory**
  Communication usually breaks down between the referral center and the referring physician. Patients often return to the referring physician with little to no instruction or information about care they received or what is needed for continuing care. Referring physicians expect and appreciate a detailed account of next steps for their patients and their role in it from the referral center physician versus the patient.
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About Endeavor

Endeavor Management, is an international management consulting firm that collaboratively works with their clients to achieve greater value from their transformational business initiatives. Endeavor serves as a catalyst by providing pragmatic methodologies and industry expertise in Transformational Strategies, Operational Excellence, Organizational Effectiveness, and Transformational Leadership.

Our clients include those responsible for:
- Business Strategy
- Marketing and Brand Strategy
- Operations
- Technology Deployment
- Strategic Human Capital
- Corporate Finance

The firm’s 40 year heritage has produced a substantial portfolio of proven methodologies, deep operational insight and broad industry experience. This experience enables our team to quickly understand the dynamics of client companies and markets. Endeavor’s clients span the globe and are typically leaders in their industry.

Gelb Consulting Group, a wholly owned subsidiary, monitors organizational performance and designs winning marketing strategies. Gelb helps organizations focus their marketing initiatives by fully understanding customer needs through proven strategic frameworks to guide marketing strategies, build trusted brands, deliver exceptional experiences and launch new products.

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