the GOLDEN CABINET

Part 2 - Handout

Your Ideal Patient

Once you are clear on the ideal type of clients you want to become your patients I guarantee this is exactly who will start knocking on your clinic door.

Basic information...

Gender
Age
Lifestyle choices
Profession or career
Income range
What are their desires and aspirations (what are they looking for in life)?
What are their fears frustrations and challenges?
What keeps them up at night?
What do they like and dislike?
What objections could they have to buying your service? (money, time, non acceptance from spouse/peers)
How do they make decisions? (logic, emotion, with spouse, financial)

Then answer these important questions...

How will your service IMPACT their life? (Now, in 1 year, 5-10 years)
What will it cost them to NOT commit to utilizing your service? (Pain and frustration) What will they miss out on?
Who will the avatar become as a result of consuming your service? What changes and transformation will take place?
What will be the ripple effects? How will their transformation impact those around them (i.e. family, kids, spouse, friends, colleagues, strangers)
How will this make their life more fun, simple, easy, and interesting?

Systems for Success

The following is a simple outline of where you should create systems for organization and prioritization, which include processes, procedures, checklists, protocols, and reporting associated with them. Obviously the list below just scratches the surface. Extensive detailed systems and operations manual documentation is the ongoing result we are looking fro from this exercise. Start implementing and documenting your systems today.

MARKETING

- ❏ Feedback
  - ❏ avatar - ideal client details
  - ❏ client feedback forms
  - ❏ net promoter score
- ❏ Promotions
  - ❏ detail documentation
  - ❏ ROI assessment
  - ❏ ideas / innovation
  - ❏ events / projects
- ❏ Advertising
  - ❏ lead generation (website, education, free materials, etc), community contribution, testimonials, online (pay per click), PR, public speaking, radio / TV, promotional materials,

MANAGEMENT

- ❏ Organization and documentation
  - ❏ maintain heading toward dream/vision/mission/plan
  - ❏ creation of company operating systems
  - ❏ marketing & client fulfillment
  - ❏ cleaning
  - ❏ daily / weekly tasks
  - ❏ prioritization
- ❏ Measurement
  - ❏ financial
  - ❏ client satisfaction
  - ❏ clinical results
  - ❏ marketing ROI
- ❏ Growth and innovation
  - ❏ recruiting and hiring

print advertising (magazines, etc), word-of-mouth

- ❏ Alliances
  - ❏ key people / organizations
  - ❏ projects
  - ❏ referral tracking
  - ❏ referral follow up
  - ❏ referral rewards
- ❏ Scripting
  - ❏ phone
  - ❏ email templates
  - ❏ sales copy templates

MONEY

- ❏ Accounting
  - ❏ bookkeeping
  - ❏ review of P&L
  - ❏ review of general ledger
  - ❏ payroll
  - ❏ sales / invoicing
  - ❏ cash handling
  - ❏ accounts receivable
- ❏ Budget
  - ❏ regular review
  - ❏ allocation
  - ❏ forecasting
  - ❏ meetings
  - ❏ culture
  - ❏ review of measurements

CRM - CLIENT RELATIONSHIP MANAGEMENT

- ❏ Communications
  - ❏ Q&A
  - ❏ phone scripting
  - ❏ email templates
  - ❏ follow up (type, frequency, amount)
  - ❏ automated email
  - ❏ internal communications
  - ❏ complaints & difficult clients
  - ❏ long term communications
  - ❏ missed appointment / refund policies
- ❏ Service
  - ❏ systems operations
  - ❏ practitioner CRM (tx plans, follow up, etc)
  - ❏ new patient intake
  - ❏ scheduling
  - ❏ order processing
  - ❏ billing & purchasing
  - ❏ introductions
  - ❏ misc services (lending library etc)

Strategic alliances

List of people, businesses, and organizations that cater to a demographic similar to your patient population (avatar).

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Ideas…

Write out ideas of how to help serve them and their customers, as well as ideas (projects, events, resources, education, etc) for collaboration.

_____
_____
_____
_____
_____
_____

Testimonial Request Email Template

Write a generic email template (that can be customized to each client) gently asking for a review or testimonial.

SUBJECT LINE

Something simple and to the point. This should never be intended to trick them into opening the email. It should sound like it is an email coming from the authentic you, like sending an email to a friend.

i.e.

- *Quick question…*
- *A small favor…*
- *It's been a while…*
- *Gentle check in…*

'*Gentle check in…*' is my favorite as I am always checking in on them as well as asking for the favor of a review or testimonial. It is rare that I send out an email that is for the sole purpose of asking for a favor, it is always dual purposed.

Experiment with some subject line ideas right now. Come up with 5 that feel right for you. Over time you will find your favorite.

1. _____
2. _____
3. _____
4. _____
5. _____

EMAIL BODY

Now it is time to write the copy for the body of the email. What you come up with here will obviously be added to and customized to varying degrees for each client you send it to. This basic template is to simply ensure you have the important information included and that your wording is exactly what you feel comfortable with sending, so you don't worry after you clicked 'send'.

Be sure to include the following 5 elements (in the order outlined);

1. Basic inquiry about how they are doing with health/life/family/career etc. This should be customized with each email to contain information with personal detail so that it is accepted as being crafted and sent specifically for them. Most often this will be asking about the health condition they came to you with.
2. Ask for the review or testimonial. Be gentle and leave lots of room for them to decline. Let them know it can be an anonymous piece they can email you for posting on your website, and/or give them links to where they can leave a review (facebook, google, yelp, etc).
3. Be grateful and tell them that many people make decisions based on reviews and testimonials so their generosity will help grow your practice.
4. Inform them that their words may be exactly what someone else needs to hear to inspire hope when struggling with health issues.
5. Close the email with warm regards.

That's it. Remember people are busy and they do not want to read a long email. Keep it short, sweet, and to the point. They will choose whether or not they will do you this favor in their own time. Don't ever be pushy. Send the email and hope for the best.

Example;

Subject:
Gentle check in…

Body:
Hi _____,

It has been a while so I wanted to drop you a quick line to say hello and see how you are doing. When you have a moment I would love to hear an update about _____ (customized).

I also have a small favor to ask of you (please do not feel obligated). Would you consider writing a paragraph or two about your experience and success with your treatments at my clinic? This would be posted on our website and can be completely anonymous if you prefer. Alternatively you could simply leave a review on our Facebook or Google+ page.

Many utilize these resources when choosing an acupuncturist, so your review would help grow my practice. Your words may also be exactly what someone else needs to hear to inspire hope when struggling with their own health issues.

I hope this finds you well and look forward to hearing from you soon!

Take great care.

Now it's your turn. Use the above example and make it your own, or simply use these principles and create an email template you feel good about sending with your name attached.