

# Client Recall & Reactivation

## What is it?

Clients who don't have future appointments booked need to be nurtured as much as the clients who do. Effective recall and reactivation processes enable your clinic to maintain those relationships, and are vital for the ongoing health of your client, and your business.

## Why is it Important?

- Perceived indifference is a killer. 68% of clients 'leave' because they perceive that it doesn't matter to you if they return or not. It's important to show how much you care by nurturing them with regular contact after each appointment, especially if they don't have any future appointments booked.
- You are the trusted advisor in your client's health, and you have the opportunity to recommend the best management plan for a clear outcome. If client's don't maintain their future appointments, your effectiveness as a health professional is reduced.
- You need a safety net to ensure clients are carefully nurtured through their journey and that they don't experience a lapse of care, ensuring the highest likelihood of success.
- It's much easier and cheaper to provide optimum care outcomes for your existing clients than it is to find a new client. You've already established rapport, likeability and trust, and good systems around recalls and reactivation enables you to find new and better ways to serve the needs of your clients.

## Definitions

### *Recall:*

Contacting a client when they're expected to book for a specific type of appointment.

Usually there is a management plan in place already, and for whatever reason there hasn't been a future appointment booked. The client still needs to be contacted to make an appointment in line with that plan.

- "We mentioned we'd call you in 6 weeks to make your review appointment"
- "Your check up is due"
- "Your periodic examination is due"

A *recall list* is the list of clients that is populated at the time the client is due to be contacted for an appointment.

### *Reactivation:*

The process of contacting clients who have not visited the clinic for a period of time, and have no future appointment booked. They are in danger of losing contact with your clinic. Reactivating clients helps to remind them that you care about their ongoing health.

## How it Works

These processes apply to clients who have no future appointment booked. At various intervals they will need to be contacted, and you can choose the frequency.

Don't worry if you feel you are nagging clients. People are generally busy, and will more likely appreciate your attention to follow up. You can always ask for forgiveness if a client is feeling hassled.

If a client cancels and is unable to reschedule right away you might offer to place them on a *recall list*, offering to contact them in 2 weeks, or perhaps 2 months, depending on the situation.

Example recall schedule:

- 2 week recall (phone call or SMS)
- 2 month recall (Phone call, SMS or email)

If you attempt to contact, or if the recall is unsuccessful, then your safety net is the **Reactivation Schedule**, where the client is contacted at regular intervals with information, special offers, or personal notes inviting them to return to the clinic.

Example Reactivation schedule:

- Reactivation SMS at 3 months
- Reactivation email at 6 months
- Reactivation letter at 12,18 months
- Reactivation letter at 2,3,4 years (include special offer and newsletter)

Method #1 - Email

- Email is a highly leveraged and automated process, enabling you to send a series of broadcasts at the scheduled time.
- Typically 2-3 emails at the time of the recall broadcast is best for exposure because some emails may be missed amongst the client's inbox/junk/spam or other folders.
- Email is quick, cheap and you can often get analytics on how effective each broadcast has been.

Method #2 - Posted Letter

- Using Letters means we can add a personal feel to our communication with an added handwritten note or personal signature.
- You also have the opportunity to include marketing material, vouchers, or printed newsletters
- Printing, folding, packing and delivering letters takes time and money, but the advantage is household letterboxes are not as cluttered as email inboxes, and the success rate can be much higher.
- Letters can be slower, with no automated analytics on effectiveness, though they do add a personal touch, and can help keep your database up to date with current home addresses.

Method #3 - Phone Call

- This can be the most effective way connect with your clients, however it relies on having them answer the phone.
- If you need to leave a message, do so, and then follow up with either of the other methods to ensure the client is engaged (e.g. send email with mention of the missed call or voicemail).
- Practitioners who make these calls can get caught delivering consultations over the phone, so our suggestion would be for a trained member of your admin team to deliver these calls. The calls can be framed as a courtesy call to check in on the patient and extend the invitation and to help arrange their next appointment time.

#### Method #4 - SMS Message

- This is an immediate and effective way to engage with your clients.
- It's hard to convey tone through a text message, but with the right words you can achieve the desired result.
- Make sure the message has a clear call to action and a simple process to act. Complexity will catch you out when you are only playing with a few characters in the message.

#### Method #5 - Push Notifications (via mobile app)

- If your clinic has a mobile app, you can engage your clients with a push notification
- Straight to the palm of your client's hand, this is an interactive way to readily engage your clients.
- You can announce new products and services and invite people to book appointments.
- There are limitations around the number of active app users, so it's best to use this in conjunction with other methods.

## What to do

- Choose your audience
  - Database segmentation using your practice management software helps you deliver personalised and specific messages to the individual. This is particularly important when you're communicating with a large audience all at once.
- Select your Recall Frequency
  - As a rule of thumb we suggest starting the reactivation process with any client who has not attended your clinic for at most 6 months, and has no future appointment booked. If this time frame is too short for your particular profession, you can still contact your client to send useful information, and reserve the invitation to book an appointment until the required time.
- Select your Recall method
  - Choose from the top 5 methods above
- Create your invitation within the Recall
  - Use a special offer as a low barrier to entry, making it really attractive for them to return for an appointment.
  - Advise clients on the new and better ways you can serve their health and body. Tell them of the fantastic new skills or technologies you now have as a

result of your continuing professional development and let them know how it can help them.

- Send the Recall or Reactivation message
  - Remember to personalise it
- Identify a tracking method
  - It's always useful to be able to track how effective each reactivation campaign is.
  - To review results of each broadcast, you should identify a special code or appointment type that you can use to measure the rebooking.
  - Measure the impact with Clinic Excellence Indicators such as Rebooking Percentage and Patient Visit Average (PVA).

### **Making it successful!**

- If you use a post-it note on the posted letter with a short handwritten personal hello and write 'Thank you' you increase the conversion by 69%.
- The key is to get clients committing to a regular routine of care... not a once off. The intention is to refine, create or continue the optimal care plan to not only manage, also optimise their health now and into the future. This is best done in the form of a written management plan outlining the next 3 visits/reviews/check up/treatments. There could be 3 weeks or 3 months between the visits, it doesn't matter, you just need to give the client a plan to work toward.