**Marketing Campaign Best Practices**

When planning a marketing campaign, here are some best practices:

* Rule of 3’s: Most marketing companies recommend the rule of 3s, which help with campaign design. Tips below.
* INITIAL INVITATION
  + EMAIL:
    - The majority of patient responses to your email invitation will happen in the first 3 days. Thereafter, response rates will drop off.
    - Provide patients with a choice to schedule: call office or select a button in the message that links to a calendar.
    - Campaign cycling: monthly until scheduled – be sure to vary the message.
  + POSTCARDS:
    - The majority of patient responses will happen over 3 weeks. Thereafter, response rates will drop off.
    - Campaign cycling: no more than 3 drops annually.
    - NOTE: We only recommend one at the beginning of your program. Then, each year, you start with an email campaign and only send postcards to patients who do not have emails, or whose emails bounce (fail).
  + OUTBOUND CALLING:
    - First, wait out the initial notification period via email or snail mail, then kick off outbound calls. Be sure to eliminate scheduled patients from the call list. Best 3 times to call: 8-10am, 12-1pm, and 3-5pm.
    - Second, IF YOU ARE WORKING WITH AN IVR, record messages for answering machines, advising the patient to call the office to schedule. Ideally, the message is recorded by the patient’s doctor and then a nurse.
    - Campaign cycling:
      * 90-day programs (3 months)
        + First message: recorded from doctor (week 1)
        + Second message: recorded by nurse (week 2)
        + Third message: live person message (week 3)
      * Call often, and at varied times, but leave messages only per above.
* REMINDERS FOR APPOINTMENTS
  + Reminders should drop 3 days prior to a patient’s appointment (email and text if permitted) and 3 hours prior to a patient’s appointment.

**Other notes on Outbound Calling**

Many patients fear a scam, so often want to call the practice to confirm the call is legitimate. Make sure your front desk is prepared.

If you outsource this service, the front desk must advise the patient the team is indeed with the practice (not some 3rd party), but that they can schedule them right now. This builds a patient’s confidence in the program. Your front desk should be versed in AWVs and be able to book the appointment.

If your internal team is conducting calls, make sure the front-desk knows to whom to route the call when patients want to schedule AWVs.

**Sample Marketing Content**

Initial Invitations:

*We include our MyCareWare process so you can test how easy it is for patients to use our online scheduling services.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dear (Patient Name),

It’s time to schedule your Annual Wellness Visit, where we will assure:

* you are aware of and getting your preventive screenings, many of which are free
* we identify any new health issues early, for discussion with your doctor
* your medical records are up-to-date

You can conveniently schedule by:

* Calling our office at xxx-xxx-xxx
* Scheduling though our patient portal at https/……
* Clicking on the button below (Pasting the address below into your browser):

https://MyCareWare.as.me/AWVappointment

We look forward to seeing you!

Your Wellness Team or Practice Name or Doctor’s Name

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Dear (Patient Name),

It’s time to schedule your Annual Wellness Visit!

You can conveniently schedule by:

* Calling our office at xxx-xxx-xxx
* Scheduling though our patient portal at https/……
* Clicking on the button below (Pasting the address below into your browser):

https://MyCareWare.as.me/AWVappointment

We look forward to seeing you!

Your Wellness Team or Practice Name or Doctor’s Name

**Appointment Confirmation: EMAIL**

*Our online appointment services automatically send a confirmation email for appointments, and, provide the patient a convenient link to reschedule. In addition, a copy of the email confirmation is sent to your designated mailbox, so if a patient prefers to call in, your office staff check the mailbox, and click on the reschedule button.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date:

Time:

Location:

Dear (Patient Name),

Thank you for scheduling your AWV call. Your call will take about an hour. To help speed the process, please have these ready:

* Your Medicare Beneficiary ID
* Your medications: we recommend having the containers with you. The containers will contain information we'll need:  the drug name, dosage, fill date and prescribing physician.
* Telephone information for your emergency contacts, caregivers, and for all your doctors, including dental and eye care physicians.

Also, to save time on our intake call, please click on either the English or Spanish links below to watch 2 videos prior to our call:

* an informative Advanced Directive video, and;
* a brief video explaining Chronic Care Management

If you have trouble, copy and paste the link in your browser.

* English

<https://www.youtube.com/embed/rIx0QrarKOQ>

<https://www.youtube.com/watch?v=xG6HV-BBLZ0>

* Spanish

<https://www.youtube.com/embed/UXCq52ngjss>

<https://www.youtube.com/watch?v=U-9CT-P8tgI>

To reschedule, please call our office.

If you have call blocking services, please add our number to your approved list: (practice telephone number).

Thank you,

Your Wellness Team or Practice Name or Doctor’s Name

**Appointment Reminder: EMAIL**

*Our online appointment services automatically send a reminder email for appointments, and, provide the patient a convenient link to reschedule.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date:

Time:

Location:

Dear (Patient Name),

This a reminder of our AWV appointment.

Please watch these videos in advance of our call.

Click on the link below, or if you have trouble, copy and paste the link in your browser.

* English

<https://www.youtube.com/embed/rIx0QrarKOQ>

<https://www.youtube.com/watch?v=xG6HV-BBLZ0>

* Spanish

<https://www.youtube.com/embed/UXCq52ngjss>

<https://www.youtube.com/watch?v=U-9CT-P8tgI>

To reschedule, please call our office.

Thank you,

Your Wellness Team or Practice Name or Doctor’s Name

**Call Scripts:**

*Please see our Scheduling FAQs for more answers to patient’s questions.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2-STEP PROGRAM:** Appointment is a 2-step process, with intake via telephone followed by an onsite appointment. The telephone intake is scheduled for one hour, the onsite for 30 minutes.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hello, my name is \_\_\_\_\_\_\_\_\_ and I am calling from Dr.\_\_\_\_\_\_\_\_\_\_’s office.  May I please speak with \_\_\_\_\_\_\_ (patient)?

**Patient identified self**

Hi \_\_\_\_\_\_\_\_(patient), We are calling for Dr \_\_\_\_\_\_\_\_\_ to get you scheduled for your Annual Wellness Visit.

The goals of the Annual Wellness Visit are to:

1. ***To assure your medical records are up-to-date***
2. ***To assure you are aware of and getting your preventive screenings***
3. ***To assure we identify any health issues early, for discussion with your doctor***

The Annual Wellness Visit is a 2-step process. The first part you will do from the comfort of your own home; the second part will be completed in our office.

Today, we are going to schedule both your appointments, and give you a list of things you need to prepare to make the first part easier for you.

Let’s schedule the telephone appointment now. Do you have a preferred date or time?

If not, here is our first available. (reference the calendar/scheduler)

This first appointment will take about an hour.

Next, let’s schedule your onsite appointment. Our next available appointment, after your telephone intake is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Will this work for you? (reference the calendar/scheduler)

The onsite appointment will take about 30 minutes. Please plan to arrive about 15 minutes early. We have a video we want you to watch in the waiting room.

Now that we’ve scheduled, I have a list of items you’ll need for the telephone call. I will be sending the list in our appointment confirmation email. We can also review that now if you want.

IF REVIEW NOW: Are you ready to write this down? You will need your:

* Medications, vitamins and supplements: we recommend having the containers with you. The containers will contain information we'll need: the drug name, dosage, and prescribing physician.
* Emergency contacts, caregivers or proxies and their telephone numbers. A proxy is someone who speaks for you when you can't speak for yourself.
* All your doctors, why you see them, and their office telephone number.

And, as long as you are writing things down: here’s your date/time for your telephone appointment\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Finally, let’s make sure we have your:

* Preferred telephone number for the call: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* A good email address where we can send your appointment confirmation and information:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Ok, any questions?

Look for our email – where you’ll find your appointment information and the items you’ll need for the telephone call. If you need to reschedule, you can call our office, or there will be a button you can select to reschedule right in the email.

Thanks for your time! We look forward to conducting your AWV.

BYE.

**Call Scripts:**

*Please see our Scheduling FAQs for more answers to patient’s questions.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ONSITE VISIT:** Appointment is completed in full.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hello, my name is \_\_\_\_\_\_\_\_\_ and I am calling from Dr.\_\_\_\_\_\_\_\_\_\_’s office.  May I please speak with \_\_\_\_\_\_\_ (patient)?

**Patient identified self**

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1. ***To assure your medical records are up-to-date***
2. ***To assure you are aware of and getting your preventive screenings***
3. ***To assure we identify any health issues early, for discussion with your doctor***

The Annual Wellness Visit will be a 90-minute appointment at our office, where you will meet with a member of our Wellness staff.

Let’s schedule your onsite appointment. Our next available appointment is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Will this work for you? (reference the calendar/scheduler)

Please plan to arrive about 15 minutes early. We have a video we want you to watch in the waiting room.

Now that we’ve scheduled, I have a list of items you’ll need for to have with you. I will be sending the list in our appointment confirmation email. We can also review that now if you want.

IF REVIEW NOW: Are you ready to write this down? You will need your:

* Medications, vitamins and supplements: we recommend having the containers with you. The containers will contain information we'll need: the drug name, dosage, and prescribing physician.
* Emergency contacts, caregivers or proxies and their telephone numbers. A proxy is someone who speaks for you when you can't speak for yourself.
* All your doctors, why you see them, and their office telephone number.

And, as long as you are writing things down: here’s your date/time for your telephone appointment\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Ok, any questions?

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Thanks for your time! We look forward to conducting your AWV.

BYE.

**Call Scripts:**

*Please see our Scheduling FAQs for more answers to patient’s questions.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**UNDER COVID:** Appointment is completed in full VIA TELEPHONE.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hello, my name is \_\_\_\_\_\_\_\_\_ and I am calling from Dr.\_\_\_\_\_\_\_\_\_\_’s office.  May I please speak with \_\_\_\_\_\_\_ (patient)?

**Patient identified self**

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1. ***To assure your medical records are up-to-date***
2. ***To assure you are aware of and getting your preventive screenings***
3. ***To assure we identify any health issues early, for discussion with your doctor***

The Annual Wellness Visit will be a 90-minute appointment at our office, where you will meet with a member of our Wellness staff via telephone. Due to COVID risk, we want to limit your exposure, so this will be a telephone call.

Let’s schedule your onsite appointment. Our next available appointment is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Will this work for you? (reference the calendar/scheduler)

Now that we’ve scheduled, I have a list of items you’ll need for to have with you and we have some videos that we’d like you to watch in advance of the call. I will be sending the list and video links in our appointment confirmation email. We can also review that now if you want.

IF REVIEW NOW: Are you ready to write this down? You will need your:

* Medications, vitamins and supplements: we recommend having the containers with you. The containers will contain information we'll need: the drug name, dosage, and prescribing physician.
* Emergency contacts, caregivers or proxies and their telephone numbers. A proxy is someone who speaks for you when you can't speak for yourself.
* All your doctors, why you see them, and their office telephone number.

And, as long as you are writing things down: here’s your date/time for your telephone appointment\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Ok, any questions?

Look for our email – where you’ll find your appointment information, the video links and the items you’ll need for the telephone call. If you need to reschedule, you can call our office, or there will be a button you can select to reschedule right in the email.

Thanks for your time! We look forward to conducting your AWV.

BYE.