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Best Practices for Digital Lead Follow Up

In this concise guide, you will learn best practices for digital lead follow-up, with an emphasis on training personnel, setting up a reliable lead capturing system and gauging progress.

In addition, you will discover how online leads differ from referrals, which is crucial to your ongoing success. In compiling this guide, our experts consulted with over 100 medical practices to uncover profitable strategies for managing successful online advertising campaigns.

Learn how your staff can more easily and efficiently convert online leads into patients.

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Developing a Proper Clinic Follow-Up Process Is Essential

When it comes to maximizing return on investment, lead follow-up is critical. Otherwise, your digital advertisement efforts will be lackluster, at best.

Your lead follow-up process will have a huge impact on your outreach success. So important is this to your online advertising initiatives, it's not an exaggeration to say efficient lead follow-up must become part of your company culture.

An ineffective lead follow-up process leads to wasteful, inefficient advertising campaigns, and, perhaps worse yet, an inability to satisfy new patient goals. An efficient process, on the other hand, can generate up to four times the monthly revenue.

According to a recent study released by Forbes:

- 71 percent of Internet leads go unused
- Most clinics take up to 45 hours to follow-up with a lead
- Only 1.3 calls are made on average before a clinic gives up on a lead

As you can see, these figures do not lend credence to the idea that most clinics are taking full advantage of all the leads they receive. Indeed, they plant a dismal picture of sales lead follow-up.

For this reason, most online lead generation programs do not deliver the return on investment the average clinic hopes for.

Many clinics understand they need to generate high-quality leads, but what seems to be lacking is a sales road map that allows staff to follow-up, nurture, and convert qualified leads.

In this guide, we will show you how to follow-up with qualified leads promptly so you can convert them into patients.

Onboarding Personnel

While working with smaller practices, we've often noticed the owner tends to be embedded in the day-to-day operations. This practice can work in especially small medical practices, but it quickly becomes an issue for growing clinics. Once the owner becomes spread too thin, new client onboarding is one of the first initiatives to be cut.

On the other hand, we've seen larger practices delegating sales outreach to front desk employees, perhaps to save money. While these employees no doubt do their best to make outgoing sales calls, they are typically not trained to do so and may be operating outside their comfort zones.

Moreover, these individuals are not incentivized to convert leads into new patients—a proper sales team offered a commission structure would be better suited.

The small practice with the owner at the helm and the large practice with the understaffed sales team both suffer from ineffective outreach. In particular, digital marketing efforts will suffer.

Specifically, digital lead-sourcing efforts will stagnate because of low connection rates. On the other hand, a clinic following lead follow-up best practice has a much better outlook.

For instance, a clinic with poor lead follow-up performance investing $2,500 per month might expect to earn $3,500 per month total. Yet a clinic with stellar lead follow-up protocols can expect to make up to ten times as much with the same initial investment. A staggering difference.

Naturally, getting lead follow-up quality to where it needs to be represents an investment in both time and money. It means having a dedicated sales staff so that your clinic can follow-up with qualified leads. Indeed, it can take a growing clinic years to justify the costs of a dedicated sales team.

However, you can, through a simple process, optimize your current setup to achieve superior results. Below are a few recommendations so you can start right away.

Simplify the Process

Assign the lead follow-up process to *one* individual in the organization. Don't allow multiple employees to do this task, regardless of their initiative, passion, or zeal. Assign the job to one person and move on, as it creates accountability.

Setting one person on the task ensures there is a dedicated employee in place to reach out to the prospect immediately after a form submission takes place. Employees won't be tripping over each other, unsure of who is supposed to take action.

Hire a Full-Time Sales Team

Invest revenue earned through this streamlining to eventually hire a sales team, or, if constrained by budget, a single dedicated salesperson.

Think of this as an investment. A dedicated sales division in your practice will set you up to earn substantially more than you do now, especially once the operation is optimized for converting qualified leads.

Managing Digital Leads

Online leads are typically captured through the use of forms embedded on a clinic's website. Naturally, leads may come in through dedicated phone lines as well.

One consideration many novice digital marketers fail to consider is where leads will be stored and how they will be organized. While you likely have an EMR system, this is not an ideal solution for storing lead data.

What you need is a dedicated lead capturing scheme that feeds the data into a contact management system.

Once the lead lands on your site, they fill in a form, providing you with their information. They may also call your phone number at this time, and if they do, the call will be recorded by your call tracking software.

The data is then shunted seamlessly into your contact management solution. Your marketing team can then review the potential customer's data and reach out to them right away.

Also, your marketing team will be able to use the prospect's data over the long-term to improve future marketing campaigns.

Important: *We highly recommend using a HIPM-compliant CRM solution. Infusionsoft is a good option. Robust solutions such as these will ensure that the prospect's data is de-identified and is stored safely.*

Processing Lead Notifications

Standard practice dictates every time a prospect fills in a form or calls your number, your marketing team should be notified. This practice allows the designated individual to kick start the lead qualification process right away.

Modern systems use SMS or email to get the notification to the appropriate employee right away. As soon as the lead hits the "Submit" button on a form or completes a call into a tracked phone number, your system should fire a notification.

However, it's easy for emails or text messages to get "lost," and often employees simply ignore or forget about them. Moreover, it's possible for these mission-crucial messages to get buried under legitimate, but less important, messages.

Having to monitor a busy and unfocused inbox adds stress to a salesperson's job and leads to poor follow-up.

While email and text messages remain important tools to jumpstart the follow-up process, they're not particularly efficient. There are additional tools your team can use to process incoming leads.

In general, the easier it is for salespeople to access incoming leads, the more salespeople will do so willingly. What your team needs is a simple, open system that allows them to view all leads requiring follow-up within a single application.

Implementing a Lead Management Solution

Implementing a streamlined, integrated contact management system will allow your entire organization to access, manage and analyze prospect data. This practice invariably leads to improved lead follow-up.

Fortunately, the process is fairly simple:

- Choose one employee to lead the project. This practice streamlines the process and minimizes confusion.
- Set realistic time and cost expectations from the get-go. This practice helps you identify and secure all required resources.
- Outline a plan based on the overall goal of implementing an open, integrated contact management system.
- Set standards for *your* contact information so that there's no confusion when it comes time to set dedicated phone numbers or set up online forms.

Naturally, not all clinics can undertake such a complex undertaking on their own. However, costs for custom CRM solutions range from $100 to $1,000 per month depending on features—and this excludes implementation fees.

In cases where smaller clinics cannot afford a custom CRM solution, we have recommended a simple spreadsheet system. This simplified system enables business owners to access and consolidate lead data until they can afford a more full-featured solution.

In this way, smaller clinics can at least streamline their marketing efforts by moving data from various marketing campaigns into one location. Whichever approach you take, it is imperative that you move to a proper CRM system as soon as possible.

As soon as your online advertising campaign goes live, you should have a consolidated view of the leads coming in. You should be able to parse and analyze their data, and you should be able to respond to their inquiry right away.

It is crucial that you store this data in a database—or, at the very least, a cloud-based solution such as Google Sheets.

Optimizing Your Lead Follow-Up Process

According to the Harvard Business Review study, *The Short Life of Online Sales Leads,* after 24 hours, up to 47 percent of sales leads remain unanswered. This is an astounding statistic and represents money quite literally left on the table.

Thus far, we have touched upon why your practice must have a strategy for quickly following up with online leads. We've further outlined what a CRM system looks like and have shared some ideas on optimizing the same.

Now, we will discuss creating a standardized follow-up process for your sales staff to follow going forward.

Considering the 5 Pillars of Lead Follow-Up Success

Our experts recommend you consider these five questions while building your clinic's follow-up process. These questions will help guide your plan from the start so that you're more likely to get it right the first time, saving you both time and money.

We've come to view these as key considerations after having worked with hundreds of medical practices like yours.

1. Who will be responsible for following up with any leads you receive?
2. When will this individual follow-up with the lead, and what will they say?
3. How is this individual contacting leads? Email? Phone? SMS?
4. What is your lead feedback process?
5. Do you nurture cold leads? If so, how efficiently do you do this?

Who Should Be Responsible for Following Up with Your Leads?

We've touched on the importance of delegating the task of lead outreach to a single employee, team or team member. To underscore the point, this person's primary responsibility should be to follow-up with incoming leads.

In choosing an individual for this role, consider the following requirements:

- Must understand the difference between nurturing a digital lead vs. a referral lead.
- Understands your clinic's unique value proposition and has their script or defined message that sells the same.
- Has a firm understanding of your clinic's medical service offerings.

Also, this individual must be strongly motivated to convert the digital lead into a client. This practice can take the form of a commission structure.

If you can find someone who meets these requirements, you will undoubtedly see a large increase in revenue from digital advertising efforts.

What Is the Difference Between Digital Leads and Referrals?

When onboarding a new client, our team always asks the following question:

Do you have experience managing incoming leads, or is the majority of your business coming from referrals?

We like to ascertain the client's level of familiarity with digital marketing early on in the onboarding process because prospects coming from the online space behave differently than those who have been referred through word of mouth advertising.

For instance, a referral who calls your office after you've been recommended by a doctor, family member or business associate will have much more confidence in you going into the call than will someone filling out a form online. This is, after all, the power of peer-to-peer referrals.

To be clear, a referral is further down the marketing funnel, so you need only qualify them based on their needs and their budget. There is much less work involved.

However, a digital lead coming from your landing page may know little about you. They may be unsure what services you provide or even if you can help them. They may know little about your staff's expertise. They may not even know where you are located.

You can see how, then, qualifying digital leads becomes extremely important. Time is money.

Referrals are mid-funnel leads while digital leads are *top funnel* and require different handling. Specifically, they need to be sold on why they need our service and why you are the most qualified clinic to help them.

At the onset, to a digital lead, you are no better than your competition.

There are several factors you'll want to consider when processing a digital lead. How you process the lead will play a large part in how successful you are in converting them.

To Summarize

- A digital lead probably has not heard of your practice, while a referral has.
- A referral likely knows your doctors and is at least somewhat familiar with your staff. A digital lead does not know your staff.
- A referral will probably not require immediate follow-up, while a digital lead does.
- A referral probably has not contacted other clinics—your competitors—but a lead probably has.
- A referral's decision probably won't be overly swayed by special offers, but a digital lead will be.
- Both a referral and a digital lead will require education on treatment.

Reviewing the Digital Lead Follow-Up Checklist

The following is a full checklist you can use in your practice.

☐	A lead submits their data via an online form or phone system. Your system generates a notification and sends it to appropriate staff.
☐	The designated salesperson responds to the lead within five minutes of receipt.
☐	The designated salesperson discusses the patient's needs, explains the services provided by your medical practice, highlights unique selling points and expertise and covers any current special offers.
☐	The sales agent sets up a consultation between the lead and the appropriate doctor or medical professional.
☐	The agent sends a confirmation email to the prospect.
☐	The agent sends the data on to your marketing staff—this is known as providing *lead feedback.*
☐	The agent follows up with the prospect after their consultation to answer any questions they may have and to prompt them to schedule a treatment.
☐	If the lead doesn't show up to a scheduled treatment, the agent reaches out to try to reschedule and to answer any questions, counter objections or address concerns. They may also offer incentives for coming in at this time.
Ongoing Tasks	
☐	The agent places cold leads into a lead nurturing program.
☐	The agent maintains the contact management system and reviews recent digital lead activity.

Designating a Salesperson

To reiterate, simply passing off digital leads to your front desk staff or office administrator is insufficient.

In fact, this is a sure-fire way to throw money away. Your clinic must appoint someone to process digital leads as they come in, and that individual must be incentivized to convert the lead into a patient.

This is the only way to ensure you see a positive return on your digital marketing efforts and generate as much revenue as possible.

The majority of sales stemming from online leads require five follow-up calls. Granted, for a prospect with a pressing medical need, this may be slightly less, but the point stands.

But just think, if that is an average, then converting a single digital lead represents a significant investment of time and energy for your sales team.

Your office administrator simply does not have time to chase leads when he/she is also responsible for scheduling, billing, maintaining patient records, etc. It’s a lot to ask and is frankly outside the scope of their job description.

On the other hand, hiring and training dedicated sales staff is not cheap. The first-year cost of a single dedicated salesperson may be $20,000 at the low end, and it may be a full year before they’re productive.

Consequently, growing clinics may feel justified in saddling office administrators or other staff members with sales-related responsibilities.

However, in almost every case we have seen, this proves a mistake. In the few cases where office administrator, doctor, or another full-time employee successfully took on lead management, that individual intimately understood the medical practice’s operation.

Moreover, the eventual revenue gain from having a dedicated sales person almost always justifies the initial expense.

The bottom line is don’t undercut your digital marketing efforts by asking under-qualified individuals to manage incoming leads. Your staff members are busy and are probably too busy to manage incoming leads effectively.

The best practice is simply to hire a full-time salesperson as soon as possible. This individual will own and manage your lead follow-up process.

Crafting a Defined Message

Now that you have identified a qualified individual who understands the difference between digital leads and referrals, and you have incentivized them to close sales, the next step is to craft a unified marketing message. This marketing message enables you to stand out from your competition. When thinking of benefits, go first to your clinic's specialty for inspiration.

When you're creating copy, you want to focus on benefits, not features.

- What can your lead expect to achieve by doing business with you? Better health?
- Do they stand to alleviate an annoying symptom?
- Will they rid themselves of a chronic condition?

Then branch out into specifics, such as:

- The qualifications of your medical staff, and the reputation of your clinic as a whole. Have you won awards? What are the specialties of your staff? How many successful procedures have you had?
- The physical location of your clinic. Are you in a central location accessible by many communities?
- What is your process? How is it superior to that of your competitors?
- How is your pricing competitive? Do you offer any regular specials or discounts? Do you offer free consultations? Financing options?
- Do you provide any unique proprietary treatment methods? If so, what are the benefits of each?

Important: your dedicated sales staff should be able to answer these questions without hesitation. They should be able to explain these benefits and should be able to relate how your system compares to those of your biggest competitors.

It's also vital that your sales staff can explain these concepts in a consultative manner so that the lead doesn't become overwhelmed. Focus more on benefits and less on facts and figures.

Online leads are often less educated about medical procedures and terminology than referrals. This is because referrals have been conversing with peers about the procedure they may need done.

Consequently, your sales staff should be able to explain concepts without the lead feeling as if they're being talked down to.

The duration of this handholding period will vary by lead, and your sales team should be able to gauge each.

When working with clinics, we often recommend that they go through the lead process themselves as so-called secret shoppers. This gives owners insight into how well salespeople are handling the initial contact and appraisal.

Naturally, to pull this off, you must either use an online form or call in with an unknown number. But doing so allows you to glean an unbiased view of how smooth your lead follow-up operation is.

Note that when it comes time to call, you can have someone else do the talking while you listen in.

- When you call in, does your salesperson seem too aggressive?
- Are they jumping immediately to the appointment phase, or are they taking the time to engage with the caller to gather information cordially?
- Is your agent taking the time to explain what sets your clinic apart from others, and are they countering customer objections?
- Does your agent sound confident?
- Are they struggling to describe the services you provide?

If you discover that your agent isn't quite up to snuff, you can assume that you are losing leads. If a lead feels pressured into making an appointment while remaining unclear on your unique value proposition, they are more likely to flake.

If they don't show up for their appointment, not only have you lost the customer, but your staff has spent time and energy prepping for a no-show.

In summation, before attempting to book an appointment, your sales agent should take some time to describe the benefits of working with your clinic. This makes the prospect feel more at ease and consequently increases the odds of conversion.

Following is a list of common digital lead follow-up mistakes:

- Asking for the appointment without first establishing credibility.
- Discussing the price of treatment before illustrating the benefits of your service.
- Not being able to answer specific questions about the treatment, clinic or medical staff.
- Responding to leads with a canned response.
- Not responding to a Web submission immediately.
- Not responding to a call immediately.
- Misrepresenting the clinic's offerings.
- Being unfamiliar with the clinic's offerings.
- Being unfamiliar with or not discussing current specials on offer.

Initiating an appointment request *before* establishing expertise and credibility is by far the biggest mistake being made by clinics today. If your clinic is booking appointments, but suffering no-shows, it's likely your staff is booking leads without offering qualification—without making it clear to the client just how your clinic can help and why you're qualified to do so.

Appointments are the lifeblood of your business. But if you don't take the time to qualify prospective patients—to make sure they're a good fit for you and you're a good fit for them—you're just generating busy work for staff. Train your staff to take a consultative approach when handling online leads.

The top priorities are:

- Qualification
- Selling benefits of service

This will ensure that the sales process goes smoothly and that you suffer fewer missed appointments.

Additionally, many clinics we analyzed make the mistake of discussing prices minutes into a call. This approach is a poor approach as it puts you at a disadvantage and it puts potential patients on guard.

Before discussing pricing, educate the potential patient on the importance of treatment—including any associated benefits— and why your practice is the best option. Then answer any other questions about their health issues.

Indeed, pricing is the biggest qualifier. But without context, your patients are unlikely to understand the benefits of treatment. If you focus on price, you may put the patient into a position to think about their wallet first and their health second.

Put plainly, your goal is to bring the patient to a realization that pricing is not the most important aspect.

Another issue we see frequently—when helping our clients assess their sales staff—is that they don't understand the treatments being offered. Make sure your sales staff is aware of all the treatments you provide, and that they have a working understanding of what the procedure entails. The degree to which your staff understands the treatments you provide is the degree to which they can educate prospective clients.

To Summarize

- **Understand the difference between online leads and referrals.** Have a separate process for each unique channel. Your sales team should understand how to respond to online leads, and how the concerns of online leads differ from those of referrals. Moreover, online leads may require more education to convert, and your salesperson should be prepared for this.
- **Designate a full-time salesperson, or, if possible, hire one.** Don't allow multiple people to respond to leads. This only creates confusion, which leads to lost leads. Having multiple people trying to manage the lead follow-up process is the main reason many clinics fail at digital advertising.
- **Sell benefits.** Compared to referrals, digital leads are more fickle and may be unfamiliar with your practice. Lead with the benefits that your practice provides and then educate the client on specific, relevant, treatments.

Determining the Right Time to Follow-Up

According to a recent Forbes study, the odds of successfully connecting with a lead are 100 times greater if you reach out within 5 minutes as opposed to 30 minutes.

In other words, the lead begins to go cold from the moment they submit a form or make a call. This reason is yet another reason it's essential to have a dedicated salesperson ready to respond to inquiries promptly.

Needless to say, expecting an office administrator, to say nothing of an attending physician, to respond to an inquiry within five minutes is unreasonable. These individuals have their own core responsibilities to think about.

Indeed, according to research conducted by our team, the clinics that chronically under-perform in lead generation are those in which an attending physician follows up with leads. On average, physicians undertaking this additional responsibility respond to leads within four to five hours, but sometimes the delay is as long as 24 hours. Clearly, the lead has gone quite cold by then.

To be clear: in a high demand industry, you can generate hundreds of qualified leads, but if you do not respond to them quickly, you will see no return on investment.

We recommend your dedicated sales staff respond to patients right away. The optimal delay time between a lead submitting their info and your staff responding is zero seconds. Impossible, yes, but we hope it underscores just how important response time is.

Consider a more realistic interval: five minutes. Within five minutes of submitting their info, your potential patient's health issue is still top of mind. They're still weighing their options and may still be browsing the Web for clinics.

Compare that to, say, even 30 minutes later, when myriad things could have grabbed their attention. Additionally, by responding faster than your competitors, you're sending an important signal to the patient: you're more professional, more responsive, and more capable.

The bottom line is that for every minute that elapses between the time your lead submits their data and the time your staff reaches out to them, the chance of converting that lead diminishes.

Scheduling Your Campaigns

In an ideal world, your clinic would be open 24/7, and your staff would be sitting by the phone or processing incoming leads non-stop.

Of course, this is virtually never the case. It's more likely, of course, that your clinic is open during standard business hours, and that your salespeople are available a good chunk of the time, but not always.

In light of this, one best practice for running digital advertising campaigns is to have your campaigns active while your clinic is open. Virtually all online advertising platforms allow you to pause your campaign or set a schedule for your ads. Take advantage of this feature.

When we optimize our medical client's campaigns, we ensure they are in the best position to follow-up with prospects. We accomplish this by working closely with the clinic to determine when salespeople will be most receptive to incoming inquiries.

Some points to consider if you'll be managing your own campaign:

- Your clinic's hours of operation.
- Times during the day when your salespeople will be free to answer inquiries, whether they're from form submission on a landing page or via phone.
- Whether the same person responds to all leads, regardless of the day of the week.
- Whether your practice is closed during certain days of the month or year.
- Whether you have a messaging system in place to alert staff to inquiries that haven't been responded to—if, for instance, you have received inquiries during the early morning, evening or weekends.

In Summary

- **Respond to incoming leads as quickly as possible, ideally within five minutes.** This practice puts you head and shoulders above your competition and sends a powerful message to the prospect. The longer staff takes to respond to a lead, the colder the lead becomes. Cold leads represent money wasted on digital advertising.
- **Optimize your campaigns by syncing them to your office hours.** Run campaigns only when your salesperson is available to answer inquiries within the time frame recommended above. This function is a basic function of virtually all online advertising campaigns.

Following Up with Digital Leads

There are several ways to follow-up with an inquiry. However, by far the most potent is to get the prospect on the phone as soon as possible.

This way is the most effective and efficient way to establish rapport, address your prospect's objections and discuss their health issues. Over the past five years, however, the lead landscape has shifted significantly.

To stay ahead of the curve, you should be using *all* of these channels:

- Phone. This option is the ideal option.
- Text. An SMS text message can be an effective way to schedule a phone call.
- Email. Send the prospect a follow-up email that summarizes any phone conversations that have taken place and that addresses their concerns/objections. Highlight the next steps.

Phone Follow-Ups

Your first touch point, if possible, should always be the phone. Voice is important for conveying a sense of authority, caring, and expertise. As discussed, your salesperson should be reaching out to inquiries by phone as soon as they are received.

If the lead doesn't pick up immediately, your salesperson should schedule a follow-up call at the following intervals:

- 5 minutes
- 10 minutes
- 30 minutes

Additionally, your salesperson should leave at least one voicemail. Note that your salesperson is twice as likely to connect on attempt five or six than they are on attempt one or two.

After the initial three tries, it's a good idea to space future attempts throughout the remainder of the day. Studies have shown that 7 to 9 am and 4 to 6 pm have the highest connection rates. The hours between 1 and 3 pm tend to have particularly low connection rates.

On the whole, your sales team may need to make five or six connection attempts before reaching the prospect.

Text Follow-Ups

Today, many consumers prefer to communicate via text if possible. Text conversations are convenient for customers because they allow the time to formulate responses. Consequently, consumers feel less 'on the spot.'

Don't send pricing data or any other data about sales over SMS. This practice may seem like spam to consumers.

However, as indicated, you can still use SMS as a powerful communications channel. A good time to send an SMS is after the second phone call. This gentle nudge can increase engagement rates significantly.

Remember: texts tend to have a higher read rate than emails, but consumers will quickly learn to ignore texts they consider to be spam.

Email Follow-Ups

Email is an effective way to send confirmations and reminders, but it's not the best way to build the relationship. Furthermore, it's not the best way to demonstrate expertise, either, since consumers tend to delete long emails without reading them.

Use email to respond to the prospect right after they fill out a form on your landing page. Then, after your salesperson has made two phone call attempts, they should send an email follow-up letting the prospect know they tried to connect.

In Summary

- **Make more than 1-2 follow-up attempts.** If leads are allowed to go cold, you will lose money. For maximum results, your salespeople should be following up at least four times with a new prospect. Many salespeople make the mistake of giving up if they don't receive a reply after making only a few attempts. Keep in mind that it can often take around five or six attempts to get a reply.
- **Rely on phone calls, not email.** While your staff should utilize multiple channels for following up with prospects, your go-to tool should be the telephone. Speaking to clients over the phone helps you build rapport and will enable you to move your client through the sales funnel faster.

Discussing the Importance of Providing Lead Feedback

Sales lead feedback allows your team to optimize their process so you can produce more appointments. This feedback is crucial for maximizing your return on investment.

Without this information, the most you can hope for is an increase in lead volume. But, as we have seen, lead volume is not the most important factor in increasing conversion rate.

Put another way, an increase in leads is not what will propel your practice. What you need is an increase in conversions.

Once your marketing team—or outside agency—has this feedback from your sales team, they can start tweaking ad targeting and positioning.

They do so with two goals in mind:

- Increase quality
- Remove undesirable leads

The clinics that provide us with sales lead feedback on a regular basis *always* outperform those that do not.

Applying Feedback

If your marketing team or agency does not continuously ask for lead feedback, then they are not fully optimizing your campaigns. They should apply sales feedback to your landing pages, ads, and channel targeting.

Note: Your marketing team or agency should also be tracking source information for all of your campaigns. If an agency claims this is impossible, you need a new agency.

Lead feedback should be combined with tracking source information to fine-tune your advertising efforts.

With campaign tracking set up, you can take the lead feedback from your sales team to determine search intent. This will help you determine the keywords that lead to appointments and conversions.

With this data, you can, in turn, develop content marketing campaigns if you wish. Naturally, this data will also help you develop new ad messaging.

Just as importantly, this data will help you uncover the causes of poor lead quality. By reducing these dead-end leads, you save time and help your sales team focus on more promising prospects.

Documenting Sales Lead Feedback

Your sales team should keep a record of all interactions with a prospect, from inception to conversion. This database works hand in hand with your contact management system and should be integrated with it, if possible.

Note that if working with an outside agency, the agency will likely have its own system for storing and managing this data.

In this case, the agency can likely make it available to you. For instance, when working with a clinic, we provide a system that meets the needs of all involved. The bottom line is that the system should be simple for salespeople to access and use.

In Summary

- **Ensure that your salespeople are routinely providing your marketing team with feedback.** Salespeople should provide lead feedback at least once per week. This helps ensure that your online advertising campaigns stay on target.
- **Optimize your campaigns based on lead feedback.** To get the most from your campaigns, your marketing team must continuously analyze the data from your sales team. You should see your advertising campaigns becoming more focused over time.

Further Considerations

Discussing Lead Nurturing

Previously, we noted email and SMS can be viable communication channels if used properly. The real value of these channels is they allow you to nurture leads. Lead nurturing is a powerful method to keep warm leads from turning into cold leads.

Lead nurturing also allows you to:

- Stay in front of prospects.
- Cross-sell existing clients on additional services
- Introduce existing clients to promotional offers

Most of our specialty medical programs include custom-crafted email and SMS campaigns that help our clients keep leads from turning cold. Our team sends these messages to prospects depending on where they are in the decision-making process. However, some clinics already have their messaging platforms set up, utilizing MailChimp, Constant Content or some other service.

In any event, our advertising experts suggest crafting three to five emails for lead nurturing specifically. These emails should provide information on relevant treatments and special offers or promotions. The key is that these messages should provide *value.* Don't see them as commercials. Instead, view them as a way for you to provide value to your subscriber.

Your marketing team should provide these emails on a schedule similar to the following:

- An email on day 1
- An email on day 3
- An email on day 7
- An email on day 15
- An email on day 30
- An email on day 60
- An email on day 90

The emails for days 60 and 90 should provide info on new services, follow-up appointments or special offers.

Building Your Brand

Digital advertising is a big investment, and it's only natural that you want to make every dollar count.

However, in our experience, clinics that have committed to brand building campaigns such as TV, radio ads and community outreach consistently outperform clinics that do not.

How much to invest in these campaigns depends on many factors, such as:

- Local competition
- Marketing budget
- SEO rankings
- Local competition

However, investing nothing in brand building endeavors can negatively impact your online advertising efforts.

Summary

Ultimately, it's up to your designated salesperson or team to convert new leads into patients. Often, when online campaigns are under-performing, the business owner's impulse is to focus on the marketing team itself. But in working with dozens of clinic owners, we've seen that improving the lead follow-up process is crucial to success.

Hopefully, this guide has served as a reference for how your medical practice might effectively approach the lead follow-up process.

To get off on the right foot, consider these questions:

1. Who will be following up with your digital leads?
2. When do they follow up and through which channels?
3. What is their message?
4. What is your lead feedback process?
5. Are you nurturing your leads? How so?

As long as you consider these items and routinely reevaluate your system, you should have a solid foundation for success.

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