

## Component II: Administrative

### Module E: Medical Office Management

#### Topic 1: Community Outreach and Marketing

##### Statement of Purpose

To prepare the learner with basic knowledge and skills necessary to engage in marketing and community service.

##### Student Learning Outcomes

Upon completion of this topic, the learner will be able to:

1. Spell and define key terms.
2. Describe the general concept and benefit of marketing.
3. Understand the importance of researching the strengths, weaknesses and opportunities of a medical practice.
4. List marketing tools and promotional materials that may be used by a medical office.
5. Describe how the Internet can be used for marketing purposes.
6. Investigate avenues of community service and volunteerism.
7. Advocate continuing education.
8. Explain the concept of customer.

##### Terminology

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|--|-----------------------------|
| 1. American Association of Medical Assistants (AAMA) | 9. Demographic              |
| 2. American Medical Technologists (AMT)              | 10. Direct mail advertising |
| 3. Brochures   | 11. Health fairs            |
| 4. California Medical Association (CMA)              | 12. Marketing plan          |
| 5. Community service                                 | 13. Patient education       |
| 6. Competition                                       | 14. Promotion               |
| 7. Continuing education                              | 15. Seminars                |
| 8. Cardio Pulmonary Resuscitation (CPR)              | 16. Social media sites      |
|  | 17. Telehealth              |
|  | 18. Volunteerism            |
|  | 19. Website                 |

##### References

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2. Dennerll, J.T. (2006). *Medical Terminology Made Easy* (4<sup>th</sup> Ed.) Clifton Park, NY: Delmar, Cengage Learning.
3. Blesi, M., Wise, B.A., & Kelley-Arney, C, (2012) *Medical Assisting Administrative and Clinical Competencies* (7<sup>th</sup> Ed.) Clifton Park, NY: Delmar, Cengage Learning
4. Malone, C., (2013). *Medical Office Management*. Upper Saddle River, NJ: Pearson/Prentice Hall.
5. Thompson, J., (2012) *Marketing your Medical Practice: A Quick Reference Guide*, Retrieved from: [www.InsightMG.com](http://www.InsightMG.com)
6. Proctor, D. B., & Young-Adams, A. P. (2011). *Kinn's The Medical Assistant: An Applied Learning Approach* (11<sup>th</sup> Ed.). Philadelphia, PA: Saunders Elsevier.

Content Outline/Theory Objectives	Suggested Learning Activities
<p><b>Objective 1</b>  <b>Spell and define key terms.</b></p> <ul style="list-style-type: none"> <li>A. Review the terms listed in the terminology section</li> <li>B. Spell the listed terms accurately</li> <li>C. Pronounce the terms correctly</li> <li>D. Use the terms in their proper context</li> </ul>	<ul style="list-style-type: none"> <li>A. Games: word searches, crossword puzzles, Family Feud, Jeopardy, bingo, spelling bee, hangman and concentration.</li> <li>B. Administer vocabulary pre-test and post-test.</li> <li>C. Discuss learning gaps and plan for applying vocabulary.</li> </ul>
<p><b>Objective 2</b>  <b>Describe the general concept and benefit of marketing.</b></p> <ul style="list-style-type: none"> <li>A. Communication is important when dealing with the community.</li> <li>B. The concept of marketing is to make consumers aware of the quality and scope of your providers' services.</li> <li>C. Marketing promotes your provider's service.</li> <li>D. The benefit is to increase visibility and credibility in the very competitive health care industry.</li> <li>E. Identify the target market group or groups.</li> <li>F. Staff meetings are a way to help with input.</li> <li>G. The four Ps <ul style="list-style-type: none"> <li>1. Product, medical services <ul style="list-style-type: none"> <li>a. Tangible retail products.</li> <li>b. Skin care, vitamins, and prosthetic devices.</li> </ul> </li> <li>2. Placement, actual location of the medical office <ul style="list-style-type: none"> <li>a. Set-up of the office.</li> <li>b. Placement of retail objects.</li> <li>c. Influenced by traffic near the facility.</li> </ul> </li> <li>3. Price, amount of money charged for goods and services.</li> <li>4. Promotion, methods used to get product or services to the consumers/patients.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> </ul>
<p><b>Objective 3</b>  <b>Understand the importance of researching the strengths, weaknesses, and opportunities of a medical practice.</b></p> <ul style="list-style-type: none"> <li>A. Staff credentials and specialties.</li> <li>B. Location of office.</li> <li>C. Hours of operation.</li> <li>D. Supplemental benefits for patients (seminars, patient education, etc.)</li> <li>E. Community events.</li> <li>F. School/industry contacts.</li> <li>G. Professional organization liaisons.</li> <li>H. Practice website.</li> <li>I. Marketing consultants.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned readings</li> <li>C. Have students work in groups to create a list of strengths, weaknesses and opportunities within the community.</li> <li>D. Use this list for class discussion on how to maximize the practice strengths in the community.</li> </ul>

<p><b>Objective 4</b>  <b>List marketing tools and promotional materials that may be used by a medical office.</b></p> <ul style="list-style-type: none"> <li>A. Newsletters produced quarterly or biannually; contain information on variety of topics <ul style="list-style-type: none"> <li>1. Insurance updates.</li> <li>2. Introduction to new staff.</li> <li>3. Health articles.</li> </ul> </li> <li>B. Brochures 8 ½" x 11" or 4" x 9" with elaborate text and pictures <ul style="list-style-type: none"> <li>1. Educational topics such as diabetes, hypertension, weight control, healthy lifestyles, immunizations and others.</li> <li>2. Description of physicians or services offered.</li> </ul> </li> <li>C. Videos checked out from the library or for use in the office with a wide range of topics from health related issues to information on medications or exercises.</li> <li>D. Press releases of new physicians, expanded or remodeled office, new equipment or new techniques offered.</li> <li>E. Yellow Pages advertisement, general and specialty.</li> <li>F. Workshops or seminars offered by your provider for the general public <ul style="list-style-type: none"> <li>1. Attract interested members of the community.</li> <li>2. Attract potential new patients for the provider.</li> </ul> </li> <li>G. Trinkets with name imprinted like magnets, balloons, and pens.</li> <li>H. Community assistance directory sent to households in the area.</li> <li>I. Monthly newsletter.</li> <li>J. Birthday cards.</li> <li>K. Website.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Instructors contact a variety of medical supply catalogs for promotional ideas.</li> <li>D. Gather examples of brochures, local newsletter and research web pages from other medical practices or medical associations in your area.</li> </ul>
<p><b>Objective 5</b>  <b>Describe how the Internet can be used for marketing purposes.</b></p> <ul style="list-style-type: none"> <li>A. Informative website featuring staff and office amenities.</li> <li>B. Email appointment confirmations.</li> <li>C. Partner with local health services such as pharmacies and special services.</li> <li>D. Public service videos for patient education and information.</li> <li>E. Health insurance information and guides for patients.</li> <li>F. Job opportunities and employee profiles.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Research sites and discuss consumer-oriented features beneficial for medical practices.</li> <li>C. Work in groups to develop Internet based marketing for the medical practice.</li> </ul>
<p><b>Objective 6</b>  <b>Investigate avenues of community service and volunteerism.</b></p> <ul style="list-style-type: none"> <li>A. Participate in special events <ul style="list-style-type: none"> <li>1. March of Dimes walk-a-thons.</li> <li>2. Aids walk-a-thons.</li> <li>3. United Way campaigns.</li> <li>4. Homeless shelters.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students contact one agency for a calendar of events with opportunities to volunteer</li> </ul>

<ul style="list-style-type: none"> <li>5. Health fairs offered by local hospitals, parishes and community centers.</li> <li>6. American Red Cross disaster preparedness seminars and first aid instruction.</li> <li>7. Geriatric screening clinics.</li> <li>8. Flu and blood pressure clinics.</li> <li>B. Promote American Heart Association healthy lifestyle campaigns.</li> <li>C. Obtain the demographics of your community and work to fulfill its needs.</li> <li>D. Establish a relationship with local community chapters <ul style="list-style-type: none"> <li>1. American Diabetes Foundation.</li> <li>2. Society for the Blind.</li> <li>3. American Heart Association: Basic life support.</li> <li>4. Meal on Wheels.</li> <li>5. Chamber of Commerce.</li> <li>6. 6. Local school career and major fairs.</li> </ul> </li> </ul>	<p>and share with group.</p> <ul style="list-style-type: none"> <li>D. Students develop a marketing plan for community events including sponsorship of sports teams, health fairs, guest speaker at community group events, school guest speaker appearances, etc.</li> </ul>
<p><b>Objective 7</b>  <b>Advocate continuing education.</b></p> <ul style="list-style-type: none"> <li>A. CPR re-certification.</li> <li>B. Infection control, fire protection updates.</li> <li>C. Seminars <ul style="list-style-type: none"> <li>1. Insurance companies.</li> <li>2. Pharmaceutical companies.</li> <li>3. Equipment manufacturers.</li> <li>4. Local hospitals.</li> </ul> </li> <li>D. Employees should attend at least one or two educational seminars to maintain self-esteem and productivity.</li> <li>E. Read literature on procedures, products and billing.</li> <li>F. Maintain current licensure or certification by continuing education. Providers include: <ul style="list-style-type: none"> <li>1. CMA</li> <li>2. AAMA</li> <li>3. AMT</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students contact the various certifying boards for applications and continuing education information.</li> </ul>
<p><b>Objective 8</b>  <b>Explain the concept of customer service.</b></p> <ul style="list-style-type: none"> <li>A. Best way to increase the number of patients is through word of mouth.</li> <li>B. When patients are satisfied with their treatment, they will refer other patients.</li> <li>C. When unsatisfied, patients will tell everyone they know.</li> <li>D. Patients will develop a loyalty to their physician even if insurance will no longer pay for visits in part because of the attitude of the office staff <ul style="list-style-type: none"> <li>1. Sincerely ask, "How may I help you?"</li> <li>2. Ask for their preferred name.</li> <li>3. Take patients where they need to go instead of pointing.</li> <li>4. If on the phone and need to transfer a call, indicate "I'll transfer you to Patty she handles</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> </ul>

the billing and her extension in case we get disconnected is ..." or check to be sure Patty is there before transferring.

5. Project a helpful caring attitude in every contact with the patient.
6. Be courteous and kind to every patient and visitor to the office.
7. Even if the customer (patient) is not right, they should be treated with dignity and respect at all times.
8. Create a patient education calendar of events.
9. Compose and print patient education brochures for the waiting room.
10. Prepare a patient satisfaction survey sent through email.
11. Telehealth information line for patients.