Increasing Your Referrals from Other Professionals  A Step-by-Step Strategy

In the current marketplace, good clinical skills and solid credentials are necessary, but not sufficient, to create and sustain a flourishing psychology practice. Today’s psychologists must also be confident and competent in their professional relationships and activities.

A network of strong referral sources can be instrumental in sustaining or helping to grow a practice. This article summarizes important steps you can take to improve your effectiveness in developing and maintaining referrals from other professionals.

GETTING STARTED

Understanding Your Practice – Before identifying promising referral sources, you must first examine the internal workings and current direction of your own practice. Consider the following questions:

► What are your areas of competence?

► What client populations do you usually work with (for example, children, families, college students, organizations)?

► What mix of services do you provide? Consider how frequently you offer each service, as well as which services generate the most revenue for your practice.

► What payers do you work with (e.g., Medicare, Medicaid, insurance panels, self-pay clients, attorneys, employers)?

► What setting(s) do you work in (e.g., private practice office, shared suite with other professionals, professional building, hospital, school, college counseling center)?

► Are there areas of practice that you want to expand upon or transition into?

Gathering Materials – Another important part of getting started is to create and organize the tools that will help you build a stronger referral network. In creating new materials, remember to be creative, distinctive and concise. Also be sure your materials consistently reflect the professional image you want to convey. In addition to a 30-second sound bite that concisely explains who you are, what you do, and the benefits your services provide, the following tools can help you start making connections:

► Business card

► Practice brochure

► Practice Web site

► Letter of introduction

FINDING THE RIGHT REFERRAL SOURCES

Now that you have done some preparation, it is important to think about what types of professionals would be good referral sources for you. Your answers to the questions in Understanding Your Practice, above, will aid you in this process.

Given the characteristics you identified, consider the types of professionals that serve or interact with your target clientele or influence their decisions to seek the type of services you offer. Also think about the types of professionals you have access to, either by proximity, or via your participation in professional and community activities.

Examples:

► Health psychologists may want to make contact with nurse-practitioners, interns, family physicians, and specialists, such as cardiologists and oncologists.

► Psychologists who work with children and families might connect with professionals in local schools, such as principals, counselors and teachers, pediatricians, local religious leaders and case workers from county social service agencies.

► Forensic psychologists would likely seek out attorneys, judges, local and state law enforcement officials, and probation officers.

After identifying the types of professionals that are likely to be good referral sources, you next need to get specific names. Here are some examples of where to go to find the names of professionals in your community:

► Look in the local Yellow Pages under the area of interest.

► Go to your city or community Web page to look up listings of local professionals or professional groups.

► Flip through local newspapers, magazines, and promotional mailings to see who is advertising in them.

► Visit insurance company and professional association Web sites or directories to identify professionals in your area. Many Web sites will let you search by zip code and specialty.

► Use Internet search engines and enter the type of professional you are looking for and your zip code or community name.

INITIATING RELATIONSHIPS

Once you have found the referral sources that you want to link up with, think about how you can reach them and what to do when you connect. The general rule in terms of effectiveness is: in-person over phone, phone over letter, letter over e-mail. The more personal the connection, the more memorable it will be. However, as personal visits are not always feasible, written communication with a follow-up phone call can be a good substitute in some cases.

Making contact:

► Attend community events and professional association meetings.

► Visit their offices.

► Give free lectures on topics in your areas of expertise.

► Join the local chamber of commerce or small business association and participate actively.

► Host an open house at your practice and invite the professionals you identified.

continued on page 10
Increasing Your Referrals from Other Professionals  

A step-by-step strategy

In the current marketplace, good clinical skills and solid credentials are necessary, but not sufficient, to create and sustain a flourishing psychology practice. Today’s psychologists must also be confident and competent in their professional relationships and activities.

A network of strong referral sources can be instrumental in sustaining or helping to grow a practice. This article summarizes important steps you can take to improve your effectiveness in developing and maintaining referrals from other professionals.

GETTING STARTED

Understanding Your Practice – Before identifying promising referral sources, you must first examine the internal workings and current direction of your own practice. Consider the following questions:

- What are your areas of competence?
- What client populations do you usually work with (for example, children, families, college students, organizations)?
- What mix of services do you provide? Consider how frequently you offer each service, as well as which services generate the most revenue for your practice.
- What payers do you work with (e.g., Medicare, Medicaid, insurance panels, self-pay clients, attorneys, employers)?
- What setting(s) do you work in (e.g., private practice office, shared suite with other professionals, professional building, hospital, school, college counseling center)?
- Are there areas of practice that you want to expand upon or transition into?

Gathering Materials – Another important part of getting started is to create and organize the tools that will help you build a stronger referral network. In creating new materials, remember to be creative, distinctive and concise. Also be sure your materials consistently reflect the professional image you want to convey. In addition to a 30-second sound bite that concisely explains who you are, what you do, and the benefits your services provide, the following tools can help you start making connections:

- Business card
- Practice brochure
- Practice Web site
- Letter of introduction

FINDING THE RIGHT REFERRAL SOURCES

Now that you have done some preparation, it is important to think about what types of professionals would be good referral sources for you. Your answers to the questions in Understanding Your Practice, above, will aid you in this process.

Given the characteristics you identified, consider the types of professionals that serve or interact with your target clientele or influence their decisions to seek the type of services you offer. Also think about the types of professionals you have access to, either by proximity, or via your participation in professional and community activities.

Examples:

- Health psychologists may want to make contact with nurse-practitioners, interns, family physicians, and specialists, such as cardiologists and oncologists.
- Psychologists who work with children and families might connect with professionals in local schools, such as principals, counselors and teachers, pediatricians, local religious leaders and case workers from county social service agencies.
- Forensic psychologists would likely seek out attorneys, judges, local and state law enforcement officials, and probation officers.

After identifying the types of professionals that are likely to be good referral sources, you next need to get specific names. Here are some examples of where to go to find the names of professionals in your community:

- Look in the local Yellow Pages under the area of interest.
- Go to your city or community Web page to look up listings of local professionals or professional groups.
- Flip through local newspapers, magazines, and promotional mailings to see who is advertising in them.
- Visit insurance company and professional association Web sites or directories to identify professionals in your area. Many Web sites will let you search by zip code and specialty.
- Use Internet search engines and enter the type of professional you are looking for and your zip code or community name.

INITIATING RELATIONSHIPS

Once you have found the referral sources that you want to link up with, think about how you can reach them and what to do when you connect. The general rule in terms of effectiveness is: in-person over phone, phone over letter, letter over e-mail. The more personal the connection, the more memorable it will be. However, as personal visits are not always feasible, written communication with a follow-up phone call can be a good substitute in some cases.

Making contact:

- Attend community events and professional association meetings.
- Visit their offices.
- Invite them to lunch.
- Give free lectures on topics in your areas of expertise.
- Join the local chamber of commerce or small business association and participate actively.
- Host an open house at your practice and invite the professionals you identified.
Increasing Your Referrals from Other Professionals  
continued from page 9

> Send a letter of introduction, along with a business card and a copy of your brochure.

> Send a postcard announcing new services you offer, articles or information you have added to your Web site, or upcoming speaking engagements.

> Have a presence on the Internet. As more potential clients and referral sources go online to look for professional services, it is increasingly important to have a Web site and to be listed in a locator service.

What to Do

> Introduce yourself. Opportunities may be fleeting, so use your sound bite.

> Use your skills as a psychologist. Rather than coming across like a salesperson, listen to their needs and focus on the way you can help.

> Exchange business cards. This helps new contacts remember you and gives them information about how to contact you. Collecting their cards also helps you keep track of your new contacts and puts their contact information at your fingertips.

> Follow up with new contacts. Send a quick email or mail them a copy of your brochure along with a handwritten note. To jog their memory, include a reference to where you met them or the topic you discussed. Invite them to contact you if you can ever be of assistance.

> Be personable and concise. Professionals are busy, just like you are, so stick to the point, but not at the expense of being unfriendly. Remember, this is about building relationships.

> Keep track of your contacts. After meeting someone, write a note to yourself including when and where you met them, what you talked about and any other important points of information. When you are at an event or out in the community, jot these notes down on the back of the person’s business card for easy reference.

> Stick with it. Set aside a certain amount of time each week to build your network of referring professionals.

Track the sources of your referrals and adjust your efforts, as needed.

MAINTAINING RELATIONSHIPS

Now that you have made the initial connection (which is half the battle), your efforts can become that much more focused. Continuing to seek out new referrals is important, but do not neglect the referral sources that you have built over time.

Keeping the Momentum Going

> Communicate regularly. Don’t let too much time go by without being in touch with your referral sources. Depending on your relationship with a particular individual, call, email, send a follow-up letter, or meet for lunch periodically to build and maintain the relationship.

> Express your gratitude. When professionals begin to refer to you, call to thank them personally. If someone refers to you regularly, be sure to periodically let that person know you appreciate him or her sending business your way. During the winter holidays, send a card or a nominal token of thanks.

> Make referrals to your referral sources. Your contacts will view their relationship with you as mutually beneficial and will be more likely to reciprocate.

> Grow your referrals exponentially. Once you have an established relationship with a referral source, consider asking them to send information to, or put you in touch with, other professionals they know who might be interested in your services. In some cases, your referral sources may even be willing to put a stack of your business cards and brochures in their waiting area.

Reaching Out to Diverse Populations  
Opportunities and Challenges

With the growing diversity of the U.S. population, practitioners are increasingly called on to make their services more widely available in racially and ethnically diverse localities.

There is growing demand for practitioners to provide culturally appropriate assessment, treatment and preventive services. Practitioners need to be attuned to the high risk of mental health disorders such as depression among certain ethnic and cultural groups. Additional practice opportunities reflect the likelihood that some members of these groups face challenges in adjusting to unfamiliar communities and cultural norms. Chronic stressors may include the experiences of racism and acculturation by minority and immigrant populations.

According to the U.S. Census Bureau, Hispanics comprise the largest minority group in the country (approximately 40 million, or 13.7 percent of the total U.S. population) and have the highest population growth rate. Meanwhile, the millions of Americans of Asian descent speak dozens of languages and dialects. According to the 1999 U.S. Surgeon General’s Report on Mental Health, more than 35 percent of the U.S. population who identify themselves as Asian Americans or Pacific Islanders live in households where individuals older than 13 have limited proficiency in English.

Studies suggest lower overall rates of treatment for mental disorders among racial and ethnic minorities. These groups have lower aggregate education and income levels than non-minorities. Researchers have associated this disparity with a higher likelihood of individuals not receiving any mental health services, as well as receiving less adequate treatment than other mental health patients.

In today’s health care marketplace, providing services to specific populations and building a niche practice can help a psychologist remain competitive. Gaining experience in providing services to members of certain communities can help a psychologist become recognized as an expert in working with particular populations. Many practitioners also find it very gratifying that, beyond growing their practice, they are providing a valuable service by meeting community needs for mental health and health services.

This article addresses opportunities and challenges for practitioners in reaching out to build community connections and offering professional services to diverse ethnic and racial groups.

Learn about cultural values and related factors that affect demand for your services. Developing an awareness of cultural values—such as reliance on family support systems, collective decision making, spirituality and respect for peers—is paramount in reaching out to diverse populations. The ability to understand and honor a prospective client’s belief system is crucial.

Cultural factors shape perceptions of illness as well as the process of seeking help for emotional difficulties and other health-related issues. Cultural values that may inhibit