



**Medical Referrals:  
Seven Keys +  
Common Mistakes**

**THE RADIAL GROUP**  
[www.radialgroup.com](http://www.radialgroup.com)

*You know healthy living.  
We know healthy businesses.*



## You know healthy living.

Our clients and customers include:

- Wellness & fitness centers
- Weight management businesses
- Lifestyle & personal change programs
- Workplace wellness providers
- Traditional, complementary, and alternative healthcare businesses

## We know healthy businesses.

- Fortune 500 management know-how tailored for health and wellness businesses.
- Everything your business needs to succeed...sales, marketing, operations, financial management and business planning.
- Online and in-person workshops, audiocourses, how-to guides and coaching for **your** schedule and **your** budget.
- Radial also sponsors quarterly Vision Awards and yearly public school wellness projects.

## MEDICAL REFERRALS: SEVEN KEYS + COMMON MISTAKES

Healthcare referrals are a terrific source of new clients for wellness businesses and professionals. These keys will help your business win referrals from physicians and other healthcare professionals.

### 1. Understand where physicians are coming from.

Doctors want patients to lose weight or exercise to improve risk factors like high cholesterol, or to better manage chronic conditions like diabetes.

However, most medical schools don't train doctors in weight loss, healthy eating, and fitness. Plus, the average patient visit is only twenty minutes.

The result: While the prescription is "eat right and exercise", most physicians have neither the time nor knowledge to provide more specific and detailed direction to patients.

Skilled, experienced fitness and wellness professionals can give physicians a simple and trusted way to help these patients.

### 2. Assess the adequacy of your staff and programs.

Objectively assess whether your wellness business really has the right staff and programs in place to successfully build relationships with healthcare professionals.

Most referrals from physicians will be people with medical issues and health concerns. Simply pointing clients towards the equipment, perhaps with a superficial initial fitness assessment (PAR-Q, anyone?) and a couple of personal training sessions is inadequate.

### Staff Considerations

Since your staff will periodically consult with clients' physicians on specific medical modifications, they must have appropriate credentials, experience and expertise.

A relevant degree and appropriate certification or licensure enhances credibility and professionalism. These clients are tailor-made for wellness professionals with degrees or equivalent experience in fields like kinesiology, exercise science, clinical nutrition, physical therapy, health promotion and health education.

### Certification tips:

Best choices: NCCA-certified programs and other well-regarded programs like ACSM and The Cooper Institute.

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Choose specialized certifications - for example, weight loss, nutrition, cardiac rehab, special populations - over general certifications.

Certifications which require a degree and experience plus an in-person practical exam and a written exam are usually stronger.

A good rule of thumb - if anyone can get the certification in a few hours or a single weekend, it's probably not sufficient to support your healthcare referral business, although it may be perfectly adequate for, say, a conventional fitness center.

### Program Considerations

Your goal is to produce a measurable change (an "outcome") in the client's health. Thus you need well-designed programs specifically designed to reduce measurable health risk factors.

For example, a diabetes prevention program can measure blood sugar at intervals throughout the program. A healthy heart program can measure the client's aerobic capacity at intervals through the program.

### 3. Educate healthcare professionals about your wellness profession.

Doctors are familiar with physical therapists and registered dietitians and often refer patients to them. However, they are unfamiliar with wellness professionals - for example, personal trainers, massage therapists, and complementary and alternative healthcare providers.

You'll need to educate healthcare professionals about your specific wellness profession and the existence of certification, licensure, continuing education requirements, and well-established practice guidelines.

Partnering with healthcare professionals like dietitians or physical therapists can boost the credibility of your business among physicians while also increasing the services you can offer.

### 4. Teach your team the fundamentals of the healthcare environment.

Federal laws like HIPAA (Health Insurance Portability and Accountability Act) govern the privacy of patient medical information. Medical offices are extremely sensitive to this relatively new legislation.

For example, special privacy requirements apply to data you receive from physicians regarding specific clients. HIPAA may also apply to information you provide to the physician regarding the client. HIPAA also comes into play if you plan to seek insurance reimbursement for certain services. Consult a healthcare attorney to understand how HIPAA applies to your business relationships with healthcare professionals.

Familiarize yourself with newer forms of health coverage like health savings accounts and flexible spending accounts. Patients can often use insurance and healthcare accounts to pay for physician-prescribed services like weight loss programs even when non-healthcare

professionals provide those services.

Some plans cover alternative and complementary medicine. Most do not cover products like nutritional supplements, weight loss cookbooks, and fitness equipment.

The physician's billing staff can often help you accurately describe your services to help clients seek insurance reimbursement.

### **5. Prove that your services actually reduce health risk factors.**

Build credibility and physician loyalty by documenting your work with referred clients using SOAP notes and progress notes. Most clients will happily give you permission to provide this data to their referring healthcare professional. Include fitness statistics like initial and current weight as well as client-specific data like range of motion. You can also include patient-provided information like initial and current cholesterol levels.

A quick overview of SOAP:

Healthcare professionals use SOAP (Subjective, Objective, Assessment, Plan) notes as a fast and effective way to briefly document 1. subjective information and 2. objective observations regarding a client's condition; 3. their diagnosis of the client's condition; and 4. their plan for addressing the client's condition.

Longer progress notes sum up the change in the client's condition since the last note.

### **6. Make it easy for doctors to refer patients.**

Provide a simple and professional brochure that healthcare professionals can give their patients.

Emphasize a healthy lifestyle. Avoid dramatic marketing claims. Describe your specific programs, how they work, and how results are measured.

Include short client success stories focused on measurable health benefits.

Include information about your staff's credentials and experience.

### **7. Present a highly professional image.**

When you present yourself and your wellness business in a healthcare setting, respect the expectations of that environment. Be punctual. Be friendly with the office staff while avoiding over-familiarity. Don't swap war stories about patients and clients while you're waiting for your meeting to start. Organize your materials so that you're not shuffling through papers. Dress professionally - either a suit or dressy business casual, not your "best" active wear. Choose a crisp, businesslike and professionally-printed design for business cards and brochures.

At the same time, it's important to establish a peer relationship with physicians. Avoid a subordinate relationship. For example, if the physician calls you by your first name, you should call the physician by his or her first name as well: "Luz", not "Doctor Garcia."

### 8. Common Questions and Mistakes

#### **Can we use our existing services or programs with our medical referral clients?**

A common mistake is treating medically-referred clients just like any other customer. Physicians refer people with special needs. Your business needs to provide services and programs tailored to those needs rather than trying to force-fit the client into what you already offer.

Traditional group fitness classes, for example, often require physical capabilities that medical referral clients don't have or can't safely use. And traditional classes aren't outcome-focused. You need programs designed specifically to produce measurable reductions in health risk factors.

Another example: some groups of clients, like people with high blood pressure or heart disease, may be taking prescription medications that are incompatible with nutritional recommendations that might be suitable for other customers.

#### **What frequent mistakes should we avoid?**

Note that the healthcare community generally disapproves of nutritional supplements, other than conventional multivitamins and glucosamine supplements.

You should also be aware that federal laws (commonly known as "Stark regulations") prevent physicians from accepting referral fees in many cases. A healthcare attorney can provide more information.

And last, we'd emphasize again a realistic look at your business and your staff. A typical health club with lightly credentialed trainers and a focus on traditional group exercise is probably not best-positioned to build a healthcare referral network.

#### **How should we decide which doctors to approach?**

Get physicians' names from clients who have successfully lost weight or improved their health under your guidance. Ask them to mention you at their next appointment, and contact their doctors' offices directly.

Best sources: clients you've helped deal successfully with risk factors like excess weight, high blood pressure, and high cholesterol, or chronic conditions like diabetes, arthritis or fibromyalgia.

Think broadly. Good referral sources include sports physicians, orthopedic and rehab specialists, internists, rheumatologists, chiropractors, geriatricians and gynecologists plus physical therapists, dietitians, nurse-practitioners, and diabetes educators.

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### Doctors are busy. How can we get in to see them?

Get to know the office staff. They control the doctor's schedule. Many physicians reserve time every month to meet with drug company reps. Ask for an appointment then.

The office staff also frequently make informal referrals. Provide a stack of brochures for their use as well as the physician's.

Give staffers an opportunity to familiarize themselves with you, your staff, and your business and programs. Consider free product trials, memberships, passes or training sessions, complimentary program attendance, and lunch-hour presentations. Zero in on staffers who'd like to improve their own wellness.

And remember - referrals can come from any healthcare professional, not just a doctor. Non-physicians like dietitians, therapists, psychologists and chiropractors are often more accessible and easier to build relationships with.

Good luck! And if you need help getting started, call us.

## Have you visited our website?

[www.radialgroup.com](http://www.radialgroup.com)

- ✓ Free "IQ tests" to check your wellness business savvy
- ✓ Free weekly newsletter with advice tailored just for wellness businesses like yours (+ back issues!)
- ✓ Online business management library with dozens of useful articles about sales, marketing, customer loyalty, financial management, and more
- ✓ Our monthly survey and drawing
- ✓ Quarterly Vision award application
- ✓ Periodic free webinars...and more!