

NEW INNOVATIONS



Innovative Online Counseling Referral Programs (Part 2)

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Referrals are the lifeblood of any online or offline counseling practice. You may have already noticed that the biggest challenges to creating an online practice often do not involve technology, legal issues or even reimbursement. The biggest challenge typically is creating a consistent flow of client referrals. My hope is that the illustrations provided here will either work for you or that the principles will help spark other innovative ideas for you.

A PROGRAMMATIC APPROACH.

For marketing to be successful,

it must be consistent. Even poor marketing methods performed consistently generate results due to market exposure. In the same way, great marketing ideas often flop because they are only performed once, poorly executed or performed inconsistently. A referral program is a step-by-step process by which clients go from the referral source's recommendation to seeing you on the screen in your online counseling venue. It's a system for generating client referrals and ensuring that they show for their first appointment. Many great therapists start a private practice and soon go out of business just because

they are starved for clients. They didn't know how to (or didn't know they needed to) develop a referral program. Lacking local advantages, online practices have an even bigger need for a referral program.

Online practices are different from face-to-face ones and require a slightly different marketing approach. Online counselors sometimes come and go because they lack effective and sustained ways to gain new clients. Like many face-to-face counselors who are new to business, they hope that getting referrals would be as easy as creating a website or a blog. In reality, new services take a lot of promotional work

and perpetual marketing for a period of time to gain traction. However, the definition of “time” can be greatly abbreviated by applying sound marketing principles and a little creativity.

LEVERAGE LOCAL RELATIONSHIPS.

Websites are necessary and occasionally generate referrals, but referrals for online counseling will come more quickly and consistently through relationships. Clients want to find a caring person they can trust and websites and blogs often fall short in conveying our relational strengths. With the relationship principle in mind, consider creating programmatic ways to

get current clients to see you online and potential clients to know you. Just because you are going to see clients online doesn't mean they can't be local. In my experience, the quickest way to develop an online practice is to leverage your current relationships or find ways to build new ones.

In part 1 of this article, we started with an innovative referral scenario from the client's perspective. A picture was painted of a client using a combination of physical and text-based advertising to generate an online counseling referral. This was only one example of a referral program. As you create your own referral program, keep in mind the main ideas: Start from the client's perspective, connect offline ads with online resources, combine advertising

methods, connect with offline referral sources, and create an ongoing process that generates online counseling referrals. The beauty of this particular program is that it can be used to generate referrals for an offline practice at the same time and generate a positive reputation as an innovative practice.

CURRENT CLIENTS.

If you have a face-to-face practice, develop a new routine of offering the option on the first contact, in the first session, and as an option when there is a schedule change or when the client or therapist has to travel. You might even consider a mix of online and offline counseling with your current clients. A pair of counselors I know see clients face-to-face in the summer up north near their summer home. The other half of the year, they continue



seeing the same clients online while the therapists winter in Florida. Their success came from normalizing the expectation of online counseling with the clients.

For my face-to-face clients, the transition to online counseling was easier because they already knew me and trusted me. Initially, some refused online counseling just because they

preferred face-to-face contact. However, when I moved to another state, it forced the issue and many clients chose to continue with me online. I attribute part of this success to developing a very simple onboarding process to help clients transition to online care.

EDUCATE.

Whether you already have trusted referral relationships or you are developing new ones, consider spending some time educating referral sources about the process of how clients get started in online counseling. It likely will take several meetings before you get a client. However, these referral sources are basically your front line sales people and they need to be able to trust you, trust the service and trust their own ability to explain online counseling to the client. Be sure to arm them with the necessary talking points and materials to champion your online practice. If their office



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has a regular meeting, ask if you can present to their group. Of course the best way to do this is to have someone bring a laptop in your place and you show up on screen, just like an online counseling session. You only need to be in the next room to give them a taste of online counseling.

GIVE TASTE TESTS.

The example of the presentation is a great example of a "Taste test." Giving clients and referral sources the experience of seeing you online will generate trust and help them feel more comfortable with the idea of online counseling. Webinars are a good way to give clients a taste test without much risk to you or to them. Consider offering a webinar to a local business or church group on a hot topic. It doesn't have to be more than 30-45 minutes and allow interaction by answering questions. Offer free initial (20 minute) video consultations as a follow up to help webinar attendees decide if they need counseling and if the online

venue will work for them. Be sure to publicize the webinar well in advance and promote it many times.

Institutions in your state may also be a good place to start. Find group homes, hospitals, schools, colleges or agencies that are looking for a counselors and offer to meet their needs temporarily online. Approaching them as a temporary resource will allow them to pilot the idea of online therapy, without the investment of significant financial or political capital. This could come in the form of a small contract to see a few clients weekly, to handle their overflow, or to fill in for counselors on leave.

WHERE TO INVEST.

It may seem like a lot of work up front and you may feel out of your element, but finding a way to create an online

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referral process will help ensure that you build and sustain your online practice. Referral development looks different for different kinds of practices. Be careful of anyone offering quick fixes or automated systems and programs that lack individualization. It's helpful to get advice or brief consulting from those who have gone before you, especially if you have not had a previous private practice. Your program will likely need more strategy than cash investment. If you are launching your own practice, especially an online one, referral development is where your investment in time and money will pay off. ■