



Viva Referral Program™

User's Manual

The **Art** of Patient Acquisition



For a video presentation on
the Viva Referral System, go to:
viva-cards.com/tutorials



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Introduction

Welcome to the Viva System, the revolutionary New Patient Referral Program. You are about to launch your practice into a whole new level of prosperity.

This program is far more effective than direct mail, television, newspapers, magazines, fliers, or radio advertising. Even internet marketing is becoming expensive, and all these give small, unpredictable and too slow results - if any at all.

The single largest barrier to practice growth is the acquisition of new patients. And the biggest barrier to getting new patients is the cost of advertising. The Viva System of acquiring new patients far exceeds the results of the other methods of advertising mentioned above, while being very cost effective. In fact, it is the most cost effective marketing system ever!

A word-of-mouth referral is more valuable than anyone responding to an ad or a flier. So how do you get those referrals? You get them by utilizing the Viva System!

This booklet will walk you through the simple basics to get started in this program. You are about to change the way you increase your patient base. This is a proactive system, putting you and all the staff in your office in the driver's seat. No more "waiting and hoping" for new patients.

So let's get started!



The cards

How it works

Your Viva Referral Cards are custom-made for your office. They are printed on clear plastic, resulting in brighter, crisper colors. They also promote a free service or discounted offer, such as Free Teeth Whitening. The card itself is perceived as something valuable. It's the combination of the card, it's custom design, and the offer on the card that makes it unique. People won't just throw it away when it's given to them.



Each card is designed by a professional designer using your existing office branding and identity, including your logo where it exists.



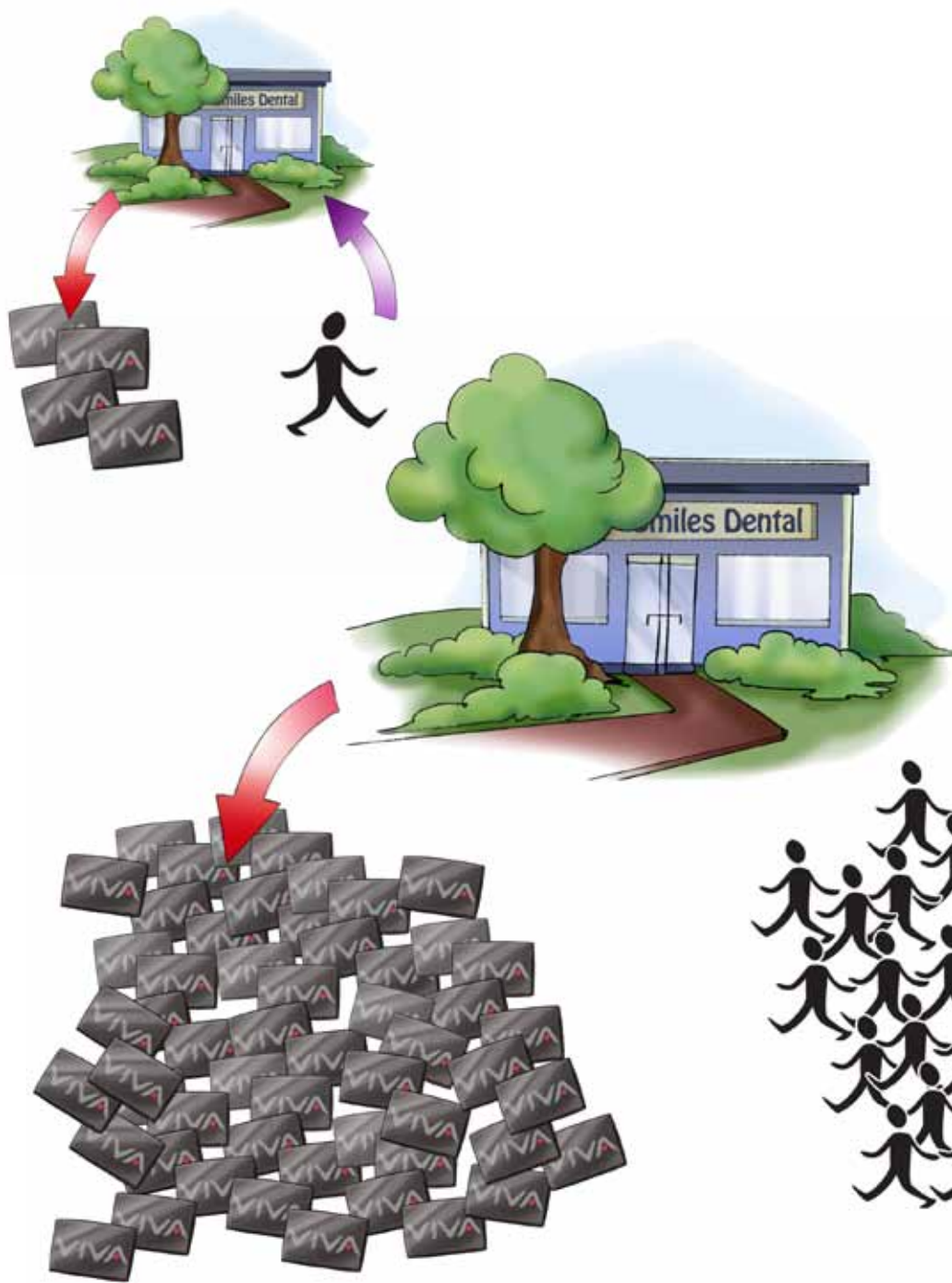
What's inside

The back of the card has your office contact information, as well as a magnetic strip and a Text-to-Activate label. The magnetic strip contains important information, such as the employee's name who gave it out, and can also show who they gave it to or where the card was given out. You will learn how to load this information onto the card later in the chapter called The Dashboard.



Notice also the label on the card. This is how your potential new patient will contact you when he receives a card and wants what you are offering. This will be described more fully in the chapter Text-to-Activate.





Response to
marketing
is proportional to
VOLUME
of distribution.



Think Big!



Rewards

What's in it for you?

The Viva Referral Marketing Program is incentive driven, meaning YOU will receive a bonus for every person that comes in from a card you originally handed out! That's right, every person who comes in!

These bonuses add up fast. One employee was able to completely pay for childcare with her bonuses. Another booked a weekend getaway with his wife using his bonuses!

You will be getting these cards out on a regular basis, along with the rest of the staff in your office. Each one you hand out will have your name programmed on it. When a new patient comes in with your card, it will get logged in on your computer. It will show that you were the person who first passed out this card. And that's how you will receive your bonus!





Your Internal Marketing Team

Finance
Coordinator



Receptionist



Dentist



Hygienist



What This Means

Every employee in the practice is part of the internal marketing team. The hygienist, the front desk staff, the Doctor... everyone is part of the internal marketing team.

What does that mean for your business or practice? It means you, as an employee, are a point of contact for anyone coming into your office or practice. Why is that important? Because it gives you the opportunity to hand out your Viva referral cards.

Even if you are an employee who never has contact with your patients, you are still part of the internal marketing team.



Assistant



The Referral Cycle

Hand the Viva Referral card to the patient.



1

5

Employee receives the bonus!



The patient gives the card to a friend, family member, or associate.



The friend or family member comes to the office for the offered service, i.e., free teeth whitening.



4



The friend or family member receives his or her service!



Distribution: Existing Patients

There are several ways to distribute these cards. The easiest, most basic method is right from your office. For example, in a dental office, you would give cards to an existing patient. This patient would then give the cards to someone they know: a friend, family member, co-worker, etc. These are potential new patients for you. They are the best type of referral because someone they know has just told them that you are the place to go for *[your free offer]*. Obviously, the person they got the card from is a satisfied customer of yours. Additionally, a display of cards at your front desk will help care for any patients you may have missed.



Dentist

Patient



But what do I say to our existing patient?

Here is an example:

Receptionist: *“Hi, Mr. Jones, how was your treatment today?”*

Patient: *It was good, Dr. Smith is really great...*

Receptionist: *“Great! Well, we love having you as our patient and we’d like to see your friends and family too. We’re offering new patients a [Free Teeth Whitening]. Can you think of anyone who might be interested?”*

Patient: *Oh wow, my wife keeps saying she wishes her teeth were whiter!*

Receptionist: *“Perfect, here’s a card for your wife, and I’m giving you an extra one for anyone else you think of.”*

Even if you are an employee who never has contact with your patients, you are still part of the internal marketing team.



Distribution: Outside the Office

And there are many other ways to distribute your cards. Here are some more examples:

Sparkle Arrangements can be assigned to individual employees as “accounts”. You, as an employee, can load your name onto the cards and take a Sparkle Arrangement and the cards to any local shop, etc., and ask them to display it for their clients. Those clients can then freely take a card, and whenever a new client comes into your office with a card, you will get the credit!



Mailing the cards out is a great way to reactivate past patients and show them how much you care. Mail cards to anyone who hasn't been in recently or didn't complete a treatment plan, as an incentive to get them back in. You can also categorize existing patients by birthday and mail a card to everyone whose birthday is this month.



Take cards with you wherever you normally go, so you can hand them out to anyone you meet. You can even contact nearby vendors and get a time when you can set up a table or booth. You can then hand out cards AND set appointments at the same time!





You can distribute cards at your child's sports games—to other parents and the coach.



Your children's school faculty is yet another example of where you can distribute the cards. And it's a great way of showing your appreciation for the hard work they do.



The staff of a local grocery store or other retail business which you regularly frequent is another means of distributing the cards.



Dashboard

The Dashboard is your location on the Viva website where you program your cards and where the system automatically records the statistics of how many cards your office has distributed and how many people have come in from the cards. You will be able to see every time one of your cards has come in from a new patient, and you will receive a bonus for each of them! So let's learn how to program a card using the Dashboard.

Magnetic Strip

The cards have a magnetic strip on the back which tracks all the information for you, eliminating the need for any paperwork.

Connecting the card reader

The card reader, or swiper, connects to your computer. Plug the card reader into the USB port of the computer you plan to use.

It should be the computer closest to where new patients will first arrive at the office, and the computer must have an internet connection.



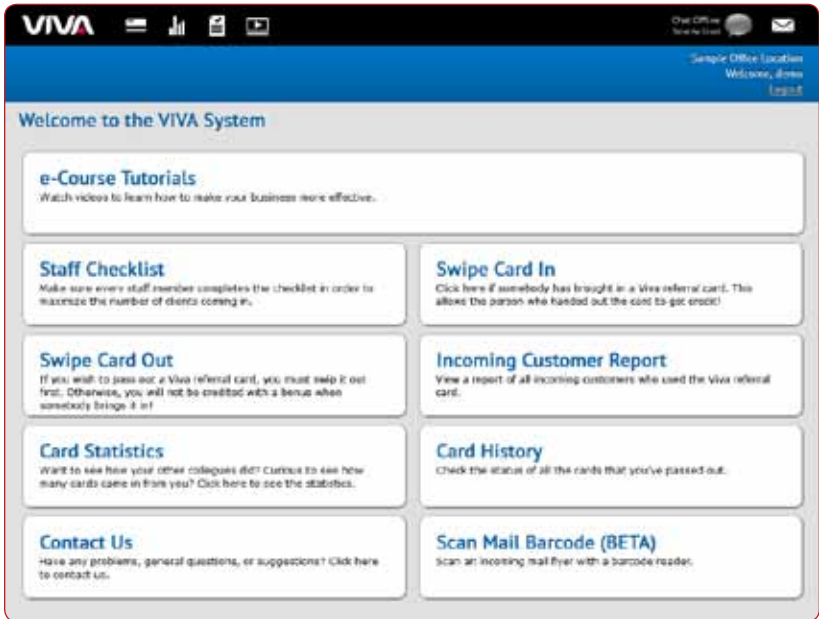
How to get to the dashboard

In your web browser go to viva-cards.com/dashboard, this is what you will see:

A screenshot of the Viva website's login page. At the top center is the 'VIVA' logo in black with a red dot above the 'A'. Below the logo is a white rectangular box with a thin border. Inside this box, the text 'Login to your account' is centered. Below this text are two input fields: 'Username' and 'Password'. To the right of the 'Password' field is a grey 'Login' button. The entire login box is set against a light grey background.

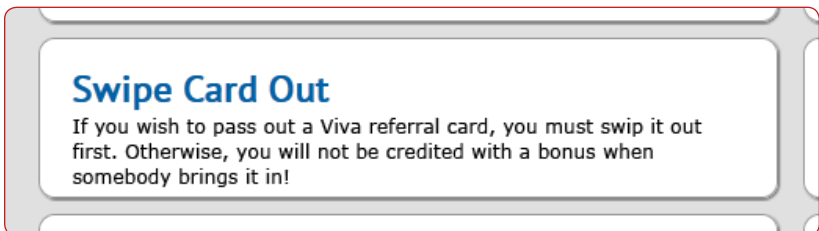
Logging in

Log-in using the username & password you were given. Once logged in, you will see the home screen



Loading the card

You choose the “Swipe Card Out” button because you will be giving these cards OUT after you program your name on them.



Select “Load Staff Name” from the drop-down menu to load your name onto your cards.



Select your name from the drop-down menu.

If your name is not listed here, click “My name is not listed” and add your name.

Once your name has been selected from the drop-down menu, click the white box to prepare the swiper. Now you are ready to swipe your cards!

Give the card a crisp, smooth swipe through the card reader, with the magnetic strip facing away from the green light.

Once you’ve done this, a green message will appear on the screen which says “SUCCESS: The card was added to list!”, and the card’s ID number will show up in the white box. You will also notice that there is a “Card List” count on the left side of the white box, which will keep track of how many cards you’ve swiped.

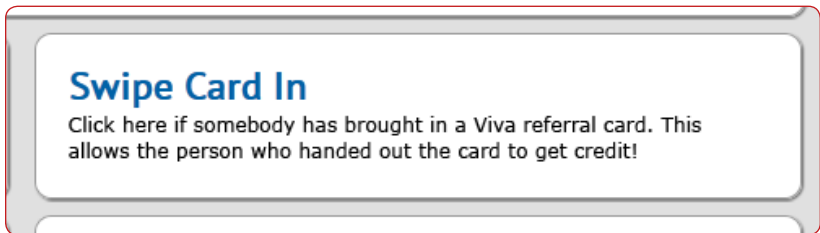


Once you've loaded as many cards as you want, click "Save Cards. We recommend saving every 30 cards or so, in case the internet connection is lost.

Now you can hand cards out to people!

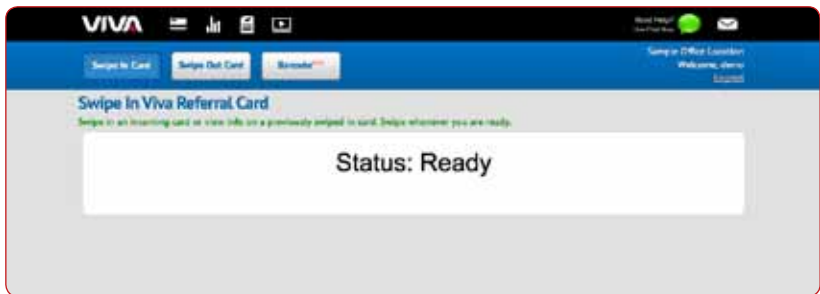
Redeeming the card

Back on the Home Screen, you use the Swipe Card In button when the new patient comes IN to your office with a referral card.

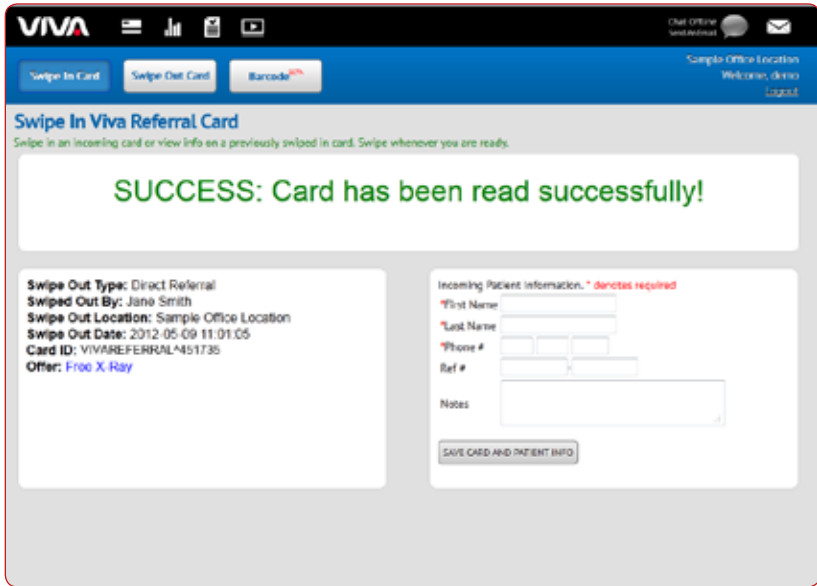


When the new patient arrives in your office, log on to the website at viva-cards.com/dashboard.

Click the Swipe Card In button. The page should say "Status: Ready", and that means you are ready to swipe the card.



At the bottom of the screen you will see the name of the employee who originally swiped out the card. This is super important because once this card is swiped in, the employee gets the bonus!



The screenshot shows the VIVA mobile app interface. At the top, there's a navigation bar with the VIVA logo, icons for a card, bar chart, document, and video, and a 'Chat Online' button. Below the navigation bar are three buttons: 'Swipe In Card', 'Swipe Out Card', and 'Barcode'. The main header reads 'Swipe In Viva Referral Card' with a sub-header 'Swipe in an incoming card or view info on a previously swiped in card. Swipe whenever you are ready.' A large green message box says 'SUCCESS: Card has been read successfully!'. Below this, there are two columns of information. The left column displays card details: 'Swipe Out Type: Direct Referral', 'Swiped Out By: Jane Smith', 'Swipe Out Location: Sample Office Location', 'Swipe Out Date: 2012-05-09 11:01:05', 'Card ID: VIVAREFERRAL451735', and 'Offer: Free X-Ray'. The right column is for 'Incoming Patient Information' and includes fields for 'First Name', 'Last Name', 'Phone #', 'Ref #', and 'Notes'. A 'SAVE CARD AND PATIENT INFO' button is at the bottom right.

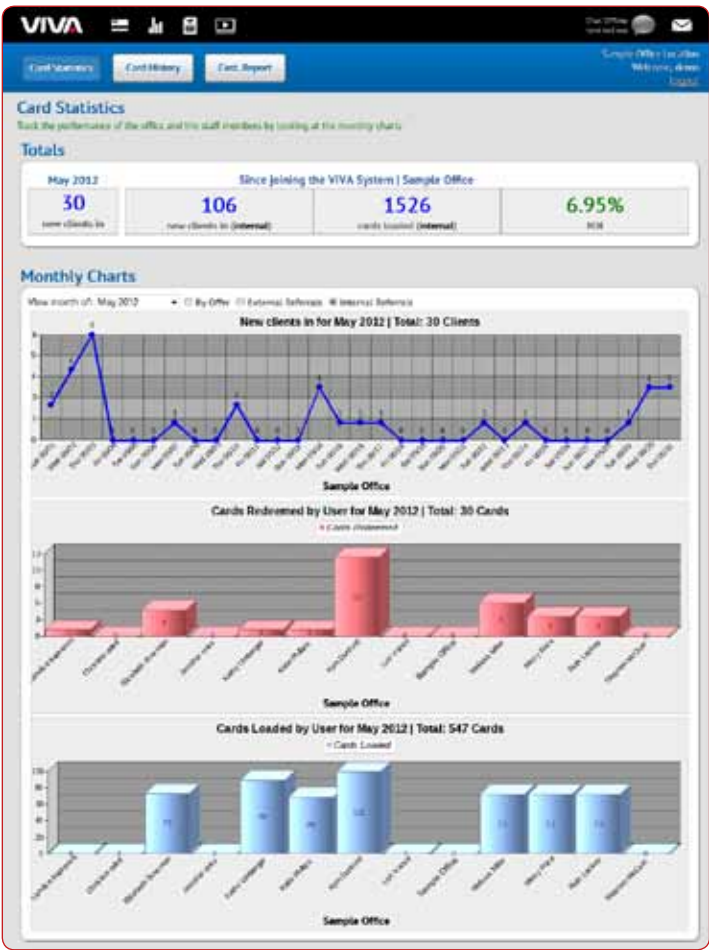
You are prompted to enter the new patient's name and phone number. You also have the option to write in a reference number, chart number, etc. and any additional notes.

Once you have finished filling this out, be sure to click "Save Card and Patient Info". This ensures you will get your bonus!



Statistics

From the Home Screen, the next feature to see on the Dashboard is: Card Statistics. Click this tab to see how well your marketing is working!



This page is your scoreboard, to not only track the success of your Viva referral program, but also to see which employees are earning the biggest bonuses! At the top of the page, you'll find the total number of new patients



acquired, as well as the percentage of how many cards have come back in, compared to how many cards have gone out. The first graph will show a breakdown of how many new patients have come in, by day and by month. The red and blue graphs towards the bottom of this page show exactly how many cards have been distributed by each employee, and how many of those cards have come back in as new patients!

Okay! So that wraps up how you load your cards before you start handing them out, how to swipe them in when a referral comes to your office, and also how you track all these cards. The goal is to get out a MINIMUM of 1000 cards a month. When you and your teammates all work together and follow the instructions for distributing your cards, you will be directly contributing to the expansion of your practice as well as your own personal income through the bonus system!



Text-to-Activate

As mentioned earlier, new patients will be coming into your office with a Viva referral card. These new patients already scheduled their appointment with you. How did that happen? Well, they activated their Viva referral card using the Text-to-Activate feature.



This is the label on the back of the card.

Note: Make sure when you are handing a card out to tell the person they need to text the code on the label in order to activate it.

- 1** A potential new patient receives a Viva referral card, and is directed to “text the code on the back to activate the card”.
- 2** They text your office’s personalized code to 84700.



- 3** Once that text has been sent, that person automatically receives a response which says:



- 4** This automatic response prepares the person to receive a phone call from your office.
- 5** At the same time, an automatic E-MAIL is generated and sent to your office, giving you that potential new patient's cell phone number.

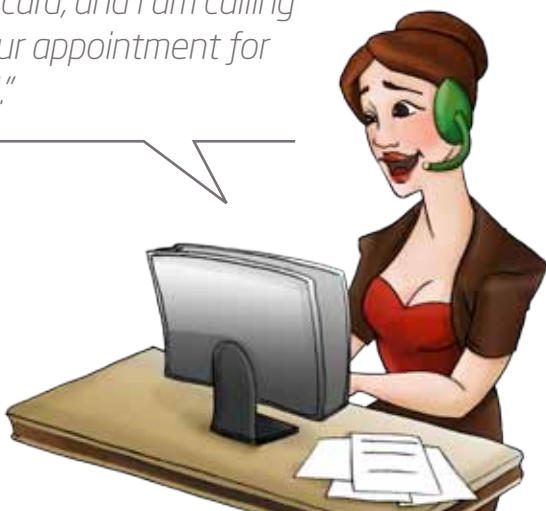


A This is your keyword, **B** This is the cell phone number of the potential new patient, that you will call to schedule their appointment, **C** This is the name of your practice



This is KEY to getting new patients scheduled. The employee in charge of scheduling appointments gets that e-mail and calls the potential new patient right away. If the patient is scheduled for the earliest possible date/time slot, the more likely he is to arrive! And remember, anyone who texted that code is interested in receiving the offered service on the card. Here is a sample of what you should say when you call the potential new patient to schedule the appointment:

"Hi. This is Carmen at Dr. Webster's dental office. I see that you activated your card, and I am calling to schedule your appointment for the [free offer]."



- 6** Remind them to bring their card to the appointment!
- 7** If you are leaving a message on an answering machine, then add:

"Please call us at your convenience at 000-123-4567. We look forward to seeing you. Have a nice day."

Keep this simple. You simply want to schedule the appointment. You can see that this puts the office in the driver's seat regarding the scheduling of new patients.



Frequently Asked Questions

Question: How do I get to the Dashboard?

Answer: The Dashboard's website address is: viva-cards.com/dashboard

Question: How do I access the Tutorials?

Answer: Once you have logged onto the Dashboard with your office's Username and Password, simply click "e-Course Tutorials" from the Home Screen.

Question: What if I lost my Username and/or Password?

Answer: Call Viva Customer Support at (818) 243-1363 ext 224. Or contact us via Live Chat by going to the Viva website: viva-cards.com

Question: Do we still accept cards past their expiration date?

Answer: Absolutely. The expiration is simply for your office's benefit, to encourage new patients to come in sooner. If someone comes in with an expired card, tell them you would be happy to honor it.

Question: If the cards get mixed up, how can I see which employee's name is on a card?

Answer: Swipe the card IN. The employee's name will show. Do not click "Save" since it is not actually a new patient coming in.

Question: If a new patient comes in with a card, but he didn't Text-to-Activate, should I have him activate it now?

Answer: No. The whole purpose of "activating" the card is to set up an appointment. If they're already in the office just swipe the card in.

Question: If a new patient walks in without an appointment but has a card, what should I do?

Answer: If the patient cannot be seen immediately, schedule him for as soon as possible and have him bring the card with him when he comes for his appointment. Don't swipe the card in until he is ready to be seen.



Troubleshooting

Question: Why isn't my card reader working?

Answer: Ensure your card reader is plugged in to the USB port properly.

Answer: Plug your card reader into a different USB port.

Answer: Upgrade your internet browser to the latest version.

Question: Why is my card reader's light blinking?

Answer: Plug your card reader into a different USB port.

ERROR MESSAGES:**ERROR: The card is already in the list!**

This means that the card you're trying to swipe out already has an employee's name loaded on it.

ERROR: The card you swiped is not valid, or was swiped improperly!

This means the swipe through the card reader wasn't smooth enough, or was too fast or too slow.

ERROR: This card has not been swiped out for customers/patients to receive yet!

This means the card you're trying to swipe in was never loaded with an employee's name—it is blank.



Summary

By following the information in this booklet, you will have learned the basics of exactly how your Viva Referral Program is going to work.

You now know:

- What the cards are
- What your offer is
- How to load your name onto the card
- Who you give the card to (EVERYONE!)
- How you will contact a potential patient for scheduling
- How to keep track of your bonuses
- How to monitor your marketing program and keep it growing

The goal is to distribute a minimum of 1000 cards per month. The faster you do this, the faster your new patients will start arriving. And don't forget—all those NEW patients are now new sources of referrals. So the cycle keeps expanding.

Which means more bonuses for you, and more expansion for the practice!



Contact Information



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viva-cards.com