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Personal Touch: (Referral Relationship Manager)

Building a robust referral network is a cornerstone of success for dental specialists, and understanding the personal details of referring general dentists (GPs)—such as birthdays, family milestones, hobbies, and preferences—can significantly strengthen these relationships. By thoughtfully gathering and acting on this information, specialists can foster trust, demonstrate genuine care, and create a collaborative partnership that encourages consistent referrals. Hiring a dedicated professional, such as a **Referral Relationship Manager**, to collect these details and execute personalized gestures like sending birthday cards or hosting networking events can transform casual professional connections into lasting, mutually beneficial relationships. This strategic approach not only enhances the specialist's reputation but also ensures GPs feel valued, making them more likely to refer patients confidently and frequently.

- 1. Birthdays:** The GP's birthday, to send a personalized card, gift, or message to show genuine care.
- 2. Spouse or Partner's Birthday:** The birthday of the GP's significant other, to acknowledge their personal life with a thoughtful gesture.
- 3. Children's Birthdays or Milestones:** Key dates like their kids' birthdays or graduations, to offer congratulations and build rapport.
- 4. Wedding or Partnership Anniversary:** The GP's anniversary date, to send a warm note or small gift celebrating their relationship.
- 5. Practice Opening Anniversary:** The date the GP's practice was established, to recognize their professional milestone with a gesture.
- 6. Work Anniversary:** The date the GP started practicing dentistry, to acknowledge their career longevity.



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7. Favorite Gift Preferences: What types of gifts (e.g., personalized items, experiences, or practical tools) the GP appreciates for special occasions.

8. Family-Oriented Events: Significant family events like a child's wedding or a parent's milestone, to offer support or congratulations.

9. Hometown or Cultural Traditions: The GP's hometown or cultural background, to connect over shared traditions or meaningful gestures tied to their heritage

10. Favorite Local Spots: Restaurants, cafes, or hangouts the GP loves, to suggest meeting there or gifting a related experience.

11. Pet Information: Whether the GP has pets and their names, to personalize gifts or conversations (e.g., a pet-themed card).

12. Vacation Preferences: Favorite vacation spots or dream destinations, to spark personal conversations or tailor gifts like travel-themed items.

13. Special Achievements: Personal accomplishments like running a marathon or completing a course, to celebrate their successes.

14. Favorite Sports Teams: Teams the GP supports, to send themed gifts or invite them to watch a game together.

15. Hobby-Related Milestones: Key dates tied to their hobbies, like an art exhibit opening for an art-loving GP, to show interest in their passions.

16. Charitable Causes: Specific charities or causes the GP supports, to align gestures like donations in their name for birthdays or holidays.



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17. Dietary Preferences: Food preferences or restrictions (e.g., vegetarian, gluten-free), to ensure gifts like treats or dining invitations are thoughtful.

18. Favorite Books or Genres: The GP's preferred reading material, to gift a book or discuss shared interests during milestone celebrations.

19. Personal Wellness Practices: Whether the GP enjoys activities like yoga or hiking, to suggest related experiences or gifts for special occasions.

20. Significant Life Transitions: Major events like moving to a new home or welcoming a grandchild, to acknowledge with a heartfelt note or gesture.

Below is a list of the best methods to collect this information, tailored to the perspective of most GPs and designed to provide actionable strategies for surgeons to build trust and collaboration. Each method ensures the approach feels natural and professional, avoiding any sense of intrusion. This can be done by the RRM.

1. Build Personal Rapport Through Casual Conversations: Engage GPs in informal chats during office visits, lunches, or dental events, asking open-ended questions like, "Any big plans for your birthday this year?" or "What do you do to unwind outside the office?" This naturally elicits details about birthdays, hobbies, or family events without seeming forced.

2. Host Social Events: Organize small gatherings like dinners, golf outings, or local dental society mixers where GPs feel comfortable sharing personal details. For example, a relaxed setting might prompt a GP to mention their favorite sports team or an upcoming family milestone, like a child's graduation.



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3. Send Brief, Personalized Surveys: Include a short “get to know you” section in referral packets or follow-up emails, asking GPs to share fun facts like their birthday, favorite local restaurant, or preferred charities. Frame it as a way to strengthen collaboration, e.g., “We’d love to celebrate your special days with you!”

4. Leverage Practice Staff Connections: Build relationships with the GP’s office manager or front desk staff, who often know personal details like birthdays or anniversaries. A friendly check-in call or thank-you gift to the office can lead to casual sharing of such information.

5. Attend Community or Professional Events: Participate in local dental association meetings or charity events where GPs are involved. Observe or ask about their engagement in causes or family-oriented activities, which can reveal details like cultural traditions or charitable passions.

6. Use Social Media Thoughtfully: Follow GPs on professional platforms like LinkedIn or appropriate personal platforms (if they share publicly), noting posts about milestones like practice anniversaries or family events. Avoid overly personal digging—stick to what’s openly shared.

7. Exchange Holiday or Birthday Cards: Send a general holiday card with a note inviting GPs to share their own special dates, like, “Let us know your birthday so we can celebrate you too!” This can prompt reciprocal sharing of personal details.

8. Ask During Thank-You Interactions: When thanking GPs for referrals (e.g., via a call or note), weave in light questions like, “By the way, are you a big sports fan?” or “Any fun vacation plans coming up?” This can uncover favorite teams or travel preferences naturally.

9. Collaborate on CE Events or Workshops: During planning for joint continuing education events, ask about their interests or background to



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personalize the experience. For example, “Do you have a favorite hobby we could incorporate into our next event?” might reveal personal passions.

10. Create a Referral Network Newsletter: Include a “spotlight” section featuring GPs, asking them to share a few personal tidbits (e.g., favorite book, pet’s name, or a recent milestone) for a fun, professional profile that other surgeons can learn from.

11. Observe Office Decor and Cues: When visiting a GP’s office, note photos, awards, or items (e.g., sports memorabilia, family pictures) that hint at personal interests or milestones. Politely ask about them, like, “Is that your family in the photo? Any big celebrations coming up?”

12. Engage in Reciprocal Sharing: Share a bit about your own milestones or interests (e.g., “My kid just graduated—any big moments in your family?”) to create a two-way dialogue that encourages GPs to open up about their own lives.

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