



# How to offer free trials and upgrades to existing patients via eAudiology

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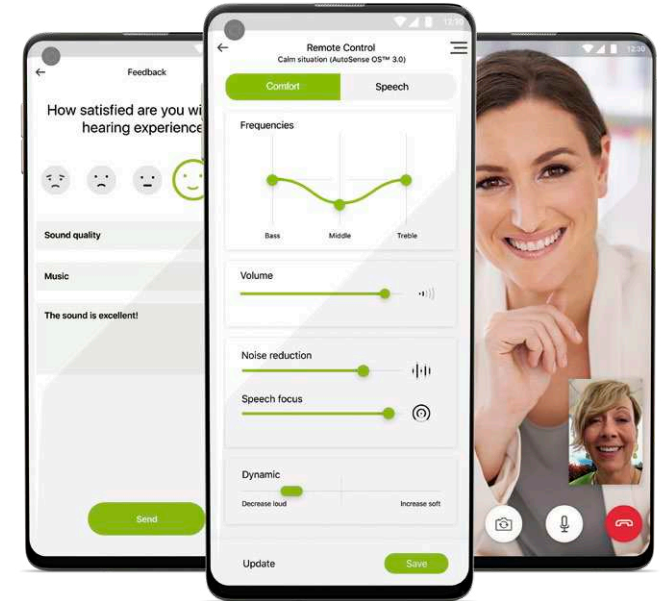
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# About this guide

## How to offer free trials and upgrades to your patients through eAudiology



### What is it?

This guide is designed to help you and your team execute a method to offering free trials and upgrades to existing patients you have in your database, who have an audiogram that is less than 2-years old, using the growing suite of Phonak eAudiology tools.

We have broken the guidance down into the following patient journeys:

- Existing patients who are currently in a trial of a Phonak Remote Support ready device
- Existing patients who were tested but not treated, or patients who may be ready for an upgrade, with an existing audiogram in your system that is less than 2-years old

### What is inside?

- **Patient Journey Flows**  
Step-by-step overview of potential journeys you may use to support your patients with free trials and upgrades
- **Database Mining Guide**  
An overview of the patient profiles you're looking for in your database to identify candidates eligible for a free trial or upgrade
- **Front Office Guidance**  
Call handling scripts and guidance to help your team navigate the conversations around this new approach to patient care
- **Database Communication Content**  
Examples of content you can use to send email or print-mail invitations to existing patients eligible for a free trial of upgrade

# Patient journey flows

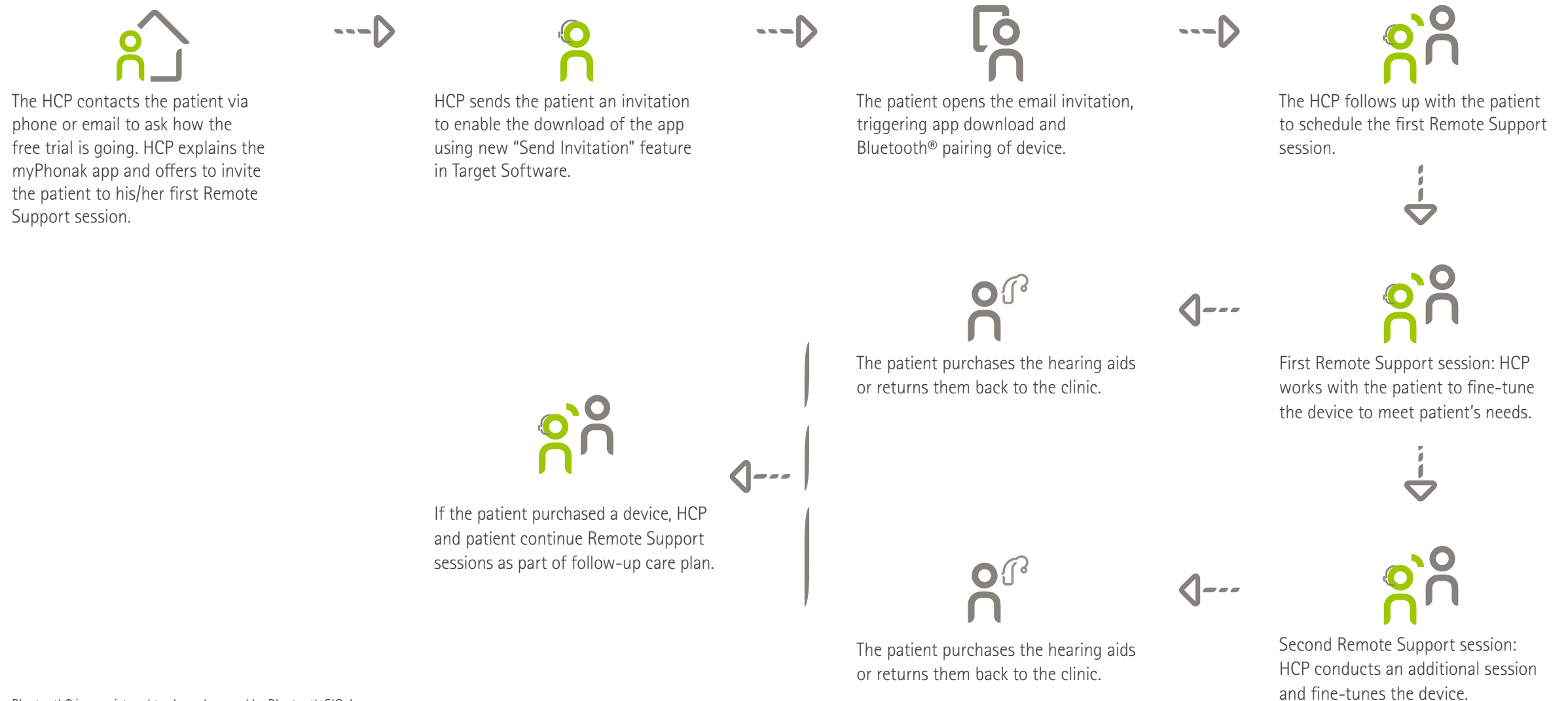
We understand that as a hearing care professional, your dedication to the wellness and hearing health of your patients is one of your most urgent concerns. In these times where personal contact with your patients may be challenging due to social distancing measures, our growing suite of Phonak eAudiology solutions are here to help support you adjust to a new approach to patient care.

Phonak continues to grow our suite of eAudiology tools, allowing you to continue supporting your patients even during these times of social distancing, with the help of our industry-leading hearing device technology.

In the following pages, you will find **Patient Journey Flows** that will help you to re-engage with patients within your database who are currently in a free trial, or are eligible for a device upgrade.

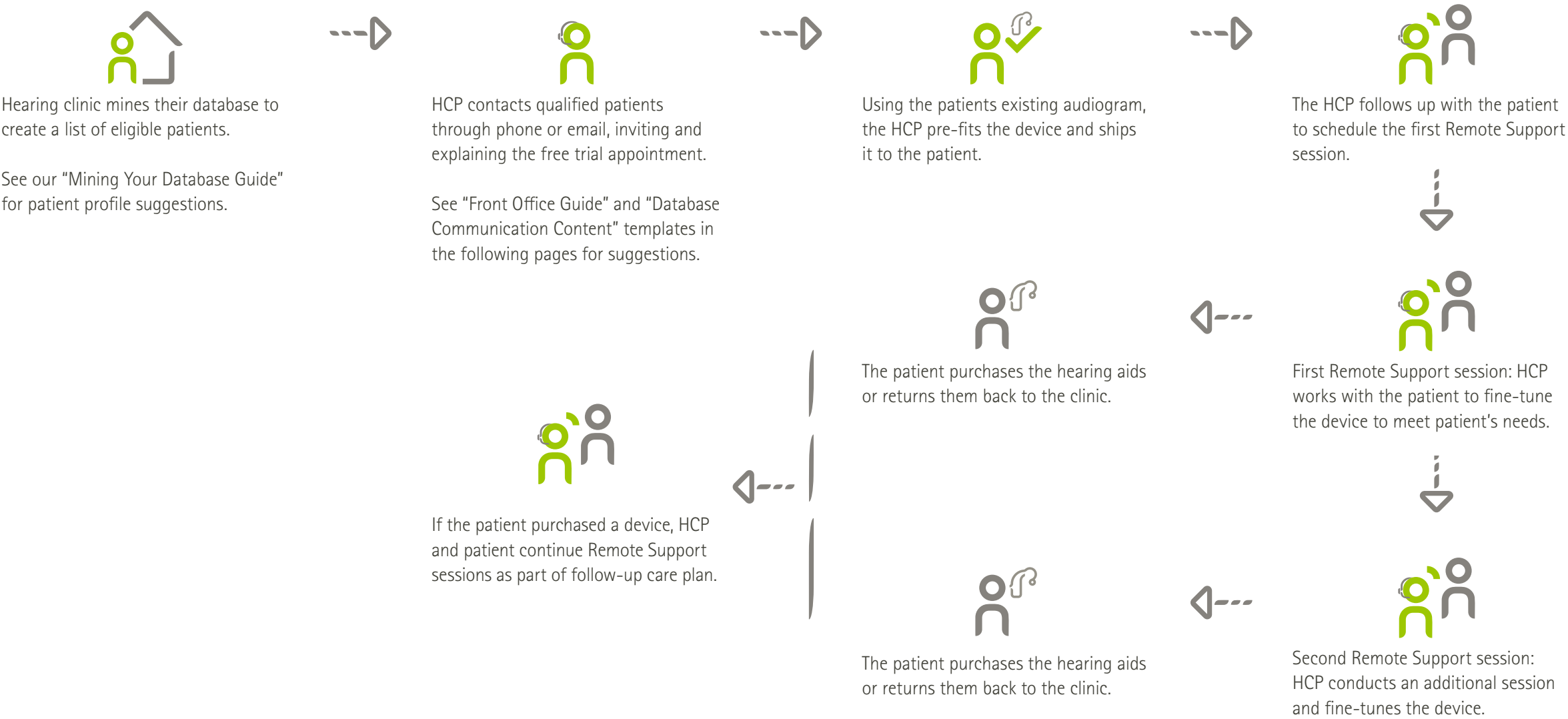
## Patient journey flows

### Existing patient in trial



Patient journey flows

Tested-not-fit or eligible for an upgrade







# Database Mining Guide

## Identifying patients who are eligible for eAudiology Support

Mining your database is a process that uses the existing data you have collected within your patient database, segmenting them into specific buckets based on a set of criteria which you have predetermined.

The goal of this process is to group those patients who are currently within a free trial or eligible for an upgrade into contact lists. This allows you to focus your team on contacting the patients who would potentially be the most in need of a hearing aid purchase.

It is likely that you are encountering many cancelled appointments at this time. By re-engaging with your current database to offer Remote Support appointments, it allows your clinic the opportunity to continue supporting your patients and ultimately helping you to generate revenue.

## Database Mining Guide

### Existing patient in trial

#### Step 1

Using your CRM or patient database, identify any patient who is currently in possession of Phonak Marvel™ or Audéo™ B-Direct free trial devices

#### Step 2

Export the list of patients whom you've found into a new list titled, "Free Trial Patients Eligible for Remote Support"

**CRM Tip:** An export feature is likely found within either a Marketing or Patients Groups tab of your CRM.

#### Step 3

Decide how you will re-engage with the patient to set up his/her virtual follow-up, either through phone or email.

In the following sections, we will provide you with call scripts and email/print content examples.

#### Tip

When using email, you can either send directly from your CRM, depending on your software, or directly with your preferred email automation software.



# Tested-not-fit and eligible for an upgrade

**Tip**

When using email, you can either send directly from your CRM, depending on your software, or in your preferred email automation software.

**Step 1**

Using your CRM or Patient Database, identify any patient who has an audiogram on file that was recorded within 2 years or less as of today's date. Export this list.



**Step 2**

From the new list you created, now identify any patient who has been "Tested-not-Fit." Save this new list titled, "Remote Support Read: Tested-not-Fit."

**Step 2**

From the new list you created, now identify any patient who has a "Last Date Purchased" of 3–5 years ago or more. Save this new list titled, "Remote Support Ready: Eligible for an Upgrade."

**Step 3**

Decide how you will re-engage with the patient (through phone or email).

In the following sections, we will provide you call scripts and email/print content examples.



# Front Office Guidance

## Approach is important

Mining your database is a process that uses the existing data you have collected. Following up with your patients who are eligible for Phonak eAudiology support is a new challenge for patient care or front office team members. More than ever, your patients are relying on their hearing health to stay connected — hearing their families, hearing their doctors, hearing on the phone, hearing the TV, listening to music, etc.

However, it is important for us to understand that your patients are currently feeling more concerns about financial risk, and yet may also be embracing digital methods of communicating with their families or healthcare providers.

We would strongly suggest contacting your patients to offer eAudiology support through an initial phone call in order to add a human element and a truly caring tone to your offering. Phone calls will also allow you to better communicate your clinic's commitment to the best in-patient care, and build good behaviors leading up to re-opening, while also allowing your team to answer questions on demand and handle objections on the spot.

In the following pages, you will find suggested call-handling scripts to support your team in engaging with your eligible for Phonak eAudiology contact list.

## Front Office Guidance

# Call script for existing patient in trial database

### 1. Greeting: Positive, lighthearted

- "Hi [name], this is [name] from \_\_\_\_\_ hearing clinic..."
- "How are you doing with everything that is going on?"

### 2. Acknowledgement/Why: Empathetic, supportive

- "We wanted to reach out to you to give you a quick update on the measures our clinic is taking to ensure your well-being and our dedication to your hearing health during this time."
- "We are reaching out to you as you have an upcoming follow-up appointment for the hearing aid trial you are currently testing out. We want to let you know that we are still here for you, and that your journey to better hearing will go uninterrupted. We have a virtual alternative we would love to share so that we can still connect for your upcoming appointment."
- "Using the Phonak Remote Support app, we will be able to continue providing you service through a virtual video chat appointment. All you need to do is download the app to your smartphone, and your HCP will send you the invitation for your virtual appointment."

### 3. Objection: If they do not have a smartphone

- "This is actually quite common. As an alternative, do you have a tablet or a family member who may have a smartphone who is coming to care for you during these times?"

**If Yes to tablet:** "Great, the myPhonak app is also available for the tablet on the app store. I can email you a link in order to download the app..."

**If Yes to family member:** "Great, we feel it's best to have a friend or family member with you during even a standard appointment. They can help to support your decisions and ensure all important information is retained. Would you like me to contact them to help them download the app we need, and to schedule a time for a Remote Support appointment?"

### 4. Objection: I will wait until the clinic re-opens again

- "As we are not able to predict how long this situation will continue, and your hearing health is important, we want to encourage you to take advantage of this new method of care. It's quite easy and kind of interesting to experience actually! Once we re-open, we will return to normal appointments for additional adjustments and follow-ups."

**If no:** "No problem. If the situation persists, would you be okay if I contact you again in a month to see how you're doing?"

### 5. Objection: What is the cost?

- "The appointment and trial will not cost you anything, plus we offer it with no obligation. Should you wish to purchase the hearing aid, your HCP will be able to discuss the cost to purchase with you, as well as choosing a solution that fits both your lifestyle needs and budget."

### 6. Objection: This sounds too complicated for me

- We have an amazing guide that easily explains step-by-step how to prepare for your virtual appointment. I will send it to you along with your appointment confirmation. It's really quite simple. If you get stuck or have any questions at all, we are here to help you every step of the way!

### 7. No objection

Review again the information required for the virtual appointment. Schedule the Remote Support session with the patient. Double-check that you have his/her correct email.

### 8. Confirmation

- Reinforce the patient's great decision to take care of his/her hearing health. Remind him/her that your clinic is here to support him/her and that his/her wellness is your priority, confirm his/her appointment date.

## Front Office Guidance

# Call script for tested-not-fit and eligible for an upgrade

### 1. Greeting: Positive, lighthearted

- "Hi (name), this is (name) from \_\_\_\_\_ hearing clinic..."
- "How are you doing with everything that is going on?"

### 2. Acknowledgement/Why: Empathetic, supportive

- "We wanted to reach out to you to give you a quick update on the measures our clinic is taking to ensure your well-being and our dedication to your hearing health during this time."
- "During this time, we know it is easy to feel isolated. We encourage that you continue to keep as many virtual social connections as possible during this time, such as calling your loved ones, FaceTime, listening to your favorite music or a movie."
- "We understand that you might be relying on your hearing health more than ever, and we wanted to check in to see if there is anything we can do to help. It has been some time since your last appointment. We wanted to let you know that we are now offering virtual appointments, using video calls, along with a no-obligation free trial of hearing aids using your previous test results. We can pre-fit and ship the trial aids directly to you and follow up with Remote Support video sessions to fine-tune them to meet your exact listening needs."
- "Although there have been changes to our clinic(s) availability, we wanted to let you know that we will continue to assist with your needs, including shipping you batteries, as well as cleaning accessories direct to your door."
- "We understand that you might be relying on your hearing health more than ever, and we wanted to check in to see if there is anything we can help with. I see that you last purchased hearing aids in \_\_\_\_\_. Since then, the hearing technology has advanced significantly, and the devices now even allow you to wirelessly connect to your Bluetooth devices, take hands-free calls, stream your favorite music and movies to your hearing aids, and virtually stay connected to your loved ones during a time when we are not able to be physically present. We have your latest audiogram on file. And if you like, we could pre-fit and ship a pair of free trial devices to you with no obligation at all just so you can try them out. We could follow up with a Remote Support session to fine-tune them without you needing to come in. It's very easy and frankly a pretty interesting thing to experience!"

### 3. Objection: If they do not have a smartphone

- "The only time you need a smartphone or tablet-style device is for the virtual appointment. Do you know a loved one who could lend you his/her device for the appointment, or could be with you during an appointment?"

### 4. Objection: I will wait until the clinic re-opens again

- "As we are not able to predict how long this situation will continue and your hearing health is vital during this time, we can easily begin the process now. Once we re-open, you could come in for any additional adjustments and follow-ups if you wish."

### 5. Objection: What is the cost?

- "The appointment and trial will not cost you anything. There is absolutely no obligation. Should you wish to purchase the hearing aid, your HCP will be able to discuss a solution that fits both your lifestyle needs and budget."

### 6. Objection: This sounds too complicated for me

- "We have an amazing guide that easily explains step-by-step how to prepare for your virtual appointment. If you get stuck or have any questions at all, we are here to help you every step of the way!"

### 7. No objection

Review again the information required for the virtual appointment. Schedule the Remote Support session with the patient. Double-check that you have his/her correct email.

### 8. Confirmation

- Reinforce the patient's great decision to take care of his/her hearing health. Remind him/her that your clinic is here to support him/her and that his/her wellness is your priority and confirm his/her appointment date.



# Database Communications

## Staying connected to your database via email or printed letter

Connect with your tested-not-fit, eligible for an upgrade or existing patient in trial through email or printed letter. With the increased usage of smartphone devices, email provides ease of convenience, which allows patients to connect with you from anywhere. It is also personal: Patients tend to respond to messages that are personalized and relevant to them.

Lastly, emails are an instant form of communication to get your clinic updates, promotions and news out while letting your patients know that they can reach out to you for their hearing health at anytime.



## Email Content Example

### Existing patient in trial

Dear [Patient-First-Name],

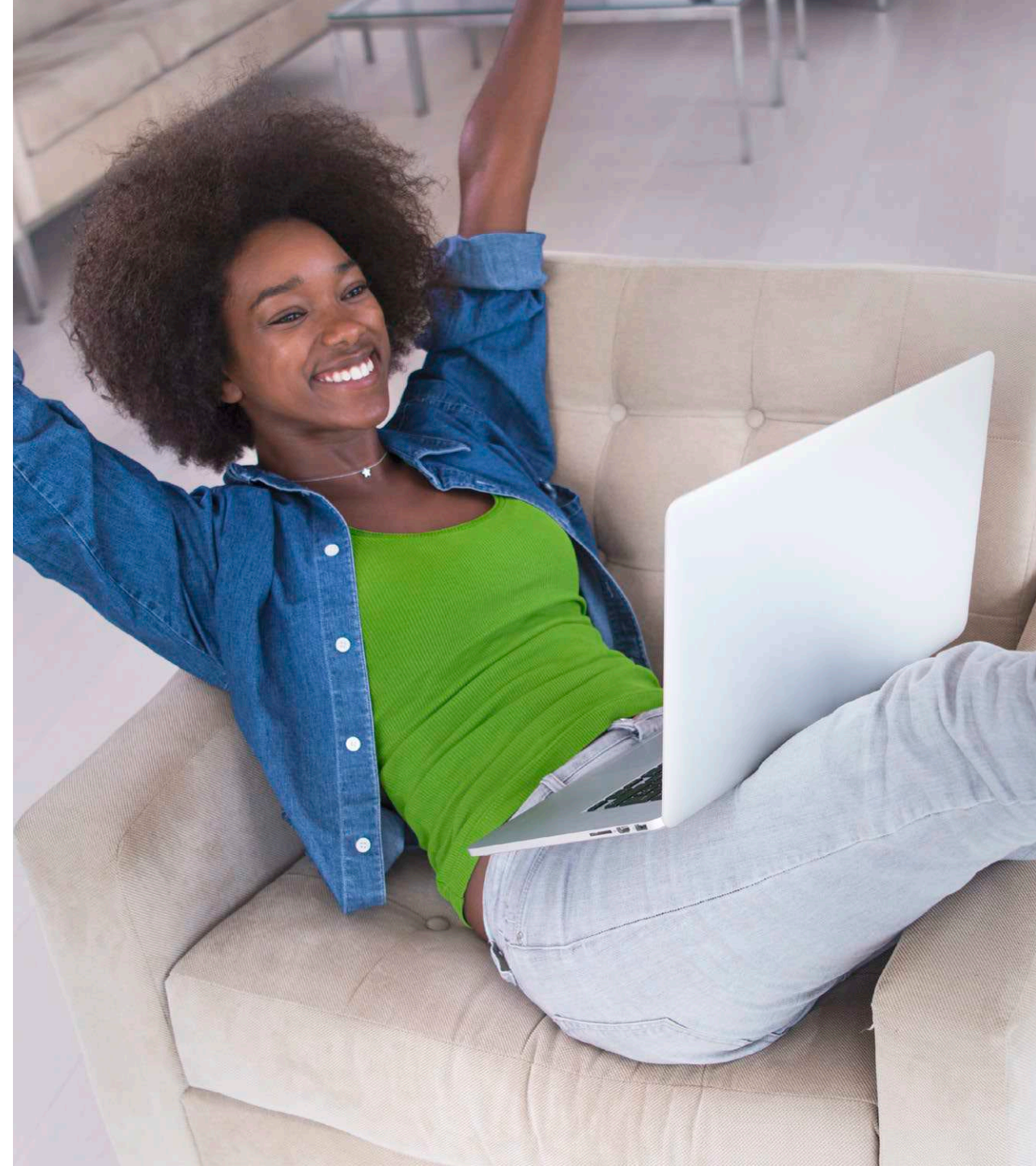
We hope you are doing well and that your friends and family are all safe and healthy! We understand that this has been a difficult time for everyone, and we wanted to reach out to let you know that we are still thinking of you and your hearing health needs. In a world where we rely on virtual connection for social interaction, we know that our hearing health is more valuable than ever. We encourage you to use phones, tablets, video chats, music, TV, movies and more to maintain relationships, feel supported and to help you keep a positive mindset during these difficult times.

We wanted to reach out about your follow-up appointment that is coming up for the hearing aid trial you are currently testing. While we can't see you in person, we are still here for you. Your journey to better hearing will go uninterrupted as we have a virtual alternative we are excited to share with you.

The myPhonak app allows our team to provide service through a virtual video chat appointment. All you need to do is download the app to your smartphone, and our team will send you the invitation for your virtual appointment.

Please let us know if you would like to proceed with the virtual appointment, and we will schedule your Remote Support session. We will also include instructions on how to navigate the myPhonak app.

Stay safe!  
[Provider's Name]



## Email Content Example

# Tested-not-fit

Dear [Patient-First-Name],

We hope you are doing well and that your friends and family are all safe and healthy! We understand that this has been a difficult time for everyone, and we wanted to reach out to let you know that we are still thinking of you and your hearing health needs. In a world where we now rely on virtual connection for social interaction, we know that your hearing health is more valuable than ever. We encourage you to use phones, tablets, video chats, music, TV, movies and more to maintain relationships, feel supported and to help you keep a positive mindset during these difficult times.

Even though our clinic is currently closed, we are determined to continue to provide excellent care to our community. You previously visited our clinic and had a hearing test, so we wanted to reach out to see if you were interested in a no-obligation, free trial of hearing aids using your test results. This is a great time to try them out risk-free on your video calls, TV and other Bluetooth® devices. We can pre-fit and ship the trial hearing aids directly to you, and then we will follow up with a Remote Support session to fine-tune them to your exact needs as well as answer any questions you may have.

These hearing aids can make a big difference in your listening experience, and we want you to give them a try! We will be providing full Remote Support, and a member of our team will walk you through each step of the process.

Please let us know if this is something you would be interested in, and we will reach out with more details.

Stay safe!  
[Provider's Name]





## Email Content Example

# Eligible for an upgrade

Dear [Patient-First-Name],

We hope you are doing well and that your friends and family are all safe and healthy! We understand that this has been a difficult time for everyone, and we wanted to reach out to let you know that we are still thinking of you and your hearing health needs. In a world where we now rely on virtual connection for social interaction, we know that hearing health is more valuable than ever. We encourage you to use phones, tablets, video chats, music, TV, movies and more to maintain relationships, feel supported and to help you keep a positive mindset during these difficult times.

Since you were last fit with a hearing aid, we wanted to let you know that there has been a lot of hearing technology advancements in recent years. We are now offering free, no-obligation hearing aid trials so that you can see what has changed since you last purchased your hearing devices.

Hearing aids are now able to wirelessly connect to your Bluetooth® devices, take hands-free calls, stream your favorite music and movies to your hearing aids, and allow you to stay seamlessly connected to your loved ones virtually during a time when we are unable to be physically present.

For your convenience, we can pre-fit and ship the trial aids directly to you and follow up with Remote Support sessions through the myPhonak app to fine-tune them to your hearing needs.

Please let us know if this is something you would be interested in, and we will reach out with more details.

Stay safe!  
[Provider's Name]

