Agenda

Introductions
Pre-Assessment Review
The Winning Numbers
Use Case
Q&A

Speakers

Ken McAfee
Product Specialist
Marketware

Susan Boydell
Partner
Barlow/McCarthy

Marcy Traxler
VP, Business Development & Service Line Strategy
AMITA Health System

Pre-Assessment Review

What is the greatest challenge your organization faces with referrals?

- Lack of strong primary care network
- Coordinating referrals to specialists in a timely and elegant manner
- Not enough staff dedicated to referral development/large territories to cover
- Accurately identify what referrals are coming into our medical group specialists as well as being able to identify where leakage is occurring
- What type of marketing materials are most useful
- The referral process is not consistent across the organization. We do not have a robust PRM tool and rely heavily on information shared by the Service Line Leaders and Strategic/Decision Support team to gain insight on referral patterns.

Observations

- Understanding physician referrals
- Prioritizing outreach efforts
- Analytics based strategy
- Accountability and measuring success
- Leveraging technology
5 Referral Growth Tips
plus 1 Power Tip!

Susan Boydell
Barlow/McCarthy

What's changing and what’s not

1. Physician Relations is poorly understood; seen as telling or problem-solving
2. Clarity of focus continues to be the greatest vulnerability
3. Growth is still king. And so is retention
4. Leakage is the answer to physician relations value in population health today
5. Effective sales responds to the physician wants not internal wants
6. Many great sales strategies fail because there is a lack of infrastructure

What scares us...

Respondents were asked to identify significant challenges their physician relations programs would face in the future...

Top three responses:
- Access to meaningful data
- Measuring ROI
- Access/time with physicians

SHSMD Physician Relations Benchmark Study, 2014

How would you describe your role?

- A physician advocate
- A volume growth expert
- A physician problem-solver
- An extension of administration
- A customer service professional
- A practice builder

• How would leadership describe your role?
• Does it fit with what the organization need?
Getting traction today

- Tighten up your visit strategy
  - Define and use your sales cycle
  - Revive your pre-call plan
  - How would your reposition your visit?
- Remove "how's it going?" from your visit script
- Ask don't tell
  - What questions do you need to ask to better position your services?
  - Empty your trunk
- Have I progressed the relationship toward additional referrals?
- Am I adding value to the office?
- Why would they want to talk with me?

Getting your leaders attention

- Report results throughout the sales cycle
  - Every mini-close is an opportunity
- Know your customer
  - Use reporting as an opportunity to educate
- Less is more
  - Package your "story" for impact
- What do my reports communicate?
- How do you present your results?

Targeting in foundational

- Determine focus clinical areas for growth
- Create a methodology to define what physician you can earn business from
- Use data and field intelligence to quantify opportunity
- Create a sales plan to define your actions in the field
  - How many visit, questions to ask, messages strategy, etc.
- Can you describe your targeting methodology?
- Do you know what you are doing with each of your target physicians?

Reporting through storytelling

Do your reports reflect your value?

Re-evaluate your target lists

Data-driven and focused

Reinvigorate your talent

Coach, teach and train!
New skills are needed today

- Determine your talent strengths and weaknesses
- Coaching is your greatest development tool
  - Get in the field with your field staff!
- Train for the skills you need
- Use your visit documentation tool to track progress
  - Track progression through the sales cycle

- Are you stuck in the comfort zone?
- What do you need to get past tough gatekeepers?

Use Case

Marcy Traxler
VP, Business Development & Service Line Strategy

Structure

Chief Strategy Officer

Vice President, Physician Recruitment and Retention

Physician Recruitment Team

Executive Assistant

Director of Business Development

Vice President, Physician Services

Physician Services Managers

Team

BD Splitter Opportunity by Territory

Business Development Collaboration
Physician View

Physician Specialty Connection

Measuring Results
- Visit threshold – entered into Marketware
- Change of performance by service line as measured by internal service line reporting
- Leakage reports by service line – Marketware
- Outpatient summary group – diagnostic imaging
- Service line project plans and support

Questions?

marketware
Thanks for attending. Visit marketware.com to learn more.