Post-Acute Growth Solutions:
Are you facing these sales and marketing challenges?

To grow admissions at your home health and hospice organization, you want to win referrals to increase market share and expand each referral partner's use of services. But, like other agencies in the industry, your organization probably faces common challenges when it comes to sales and marketing. You might struggle to identify target referral sources, capture key data, or accurately survey the market landscape.

To the rescue? A Customer Relationship Management (CRM) solution that can streamline your sales and marketing efforts, improve your customer experience, and increase productivity.

While a lot of factors play into the growth of your agency, the formula for success can be whittled down to a simple approach: **territory management + call volume + technique = growth**. A CRM solution can alleviate common challenges and help your organization develop and sustain scalable growth through data-driven sales and marketing.

Territory Management

Problem: Hard to determine which referral sources to target.
Solution: A CRM with market data helps you identify the target.

Many agencies rely on an imprecise strategy like handing off a list of accounts to the sales team or expecting them to go out into the field and know whom to call on, says Melynda Lee, MBA, Director, Growth Solutions at Simione Healthcare Consultants.

Instead, you need to make strategic decisions, starting with which referral sources to target based on the opportunity. A CRM helps you do just that.

"With the right market data, you can truly define your account list by priority," explains Lee. "Your A-level accounts are your top referrers, C-levels are your lowest referrers, and B-levels are the steady accounts in between. Those lists should be assigned to the person who's going to be responsible for nurturing and growing those accounts."

"You either grow your market share or you expand market penetration," Lee says. A CRM helps you accomplish both by identifying top accounts and prospects to nurture.

Problem: Lack of critical data.
Solution: A CRM provides the analytics you need to drive strategic decisions.

Whether you're defining your account list or setting sales and marketing goals, you want to ensure you're using accurate information on which to base these strategic decisions.

"If you're using a CRM, then you can take that critical data to the next level," says Lee, noting that a good CRM integrates data from your Electronic Medical Record (EMR) solution. A CRM allows you to see the types of referrals and where they're going. Lee then challenges, "Have you acquired the market claims data? If so, you can get a good look into what's going on in the competitive marketplace. What's your market share as well as your competitors'?"

Barriers to Success

> **Imprecise strategy**

> **Lack of critical data**

> **Lack of role definition**

> **Undefined value proposition**

> **Lack of focus on needs-based selling**

> **Too little emphasis on coaching**

Problem: Difficulty getting an accurate picture of the landscape and motivating the sales and marketing team.
Solution: A CRM helps you identify, track, measure, and communicate your goals.

Best marketing practices include a strategy that outlines your Key Performance Indicators (KPIs), allowing you to track and measure your success with accountability and transparency.

"Your strategy should have clearly defined goals and objectives for every team, every individual, every service line," advises Lee. These goals should be SMART—specific, measurable, achievable, relevant, and time-based. A CRM allows you to input all this information and set up your dashboard to focus on those key metrics.

"Great performers really want to know if they're meeting their goals and what they need to do to get there," Lee points out. A CRM can make this information easily accessible, even on their mobile devices.

On the flip side, managers and leadership should know how the team is performing, too. With a CRM, you can search for the specific role and detailed information for both the team and individuals.

"If you don't use a CRM, these salespeople and whomever they report to typically spend an enormous amount of time cobbling together reports," says Lee. "All that time could be better spent in the field cultivating relationships, growing the organization, and serving more people."

Customer Journey

> **Awareness:** Recognizing need and available solutions
> **Consideration:** Among competitors
> **Decision:** Make it easy

Call Volume

Problem: Institutional knowledge leaves with turnover.
Solution: A CRM captures and retains insights.

When a sales or marketing team member leaves, all the knowledge she/he had about customers and prospects could leave with her/him. If you're lucky, she/he might have jotted down some information in a notebook.

But a CRM captures all the key information so you can see every interaction, participants, topics of discussion, the purpose of the call, and the outcome, plus all the data around how many referrals and admissions resulted from that work. If the salesperson on that account leaves, all that knowledge stays.

Problem: Difficulty repeating successes because you don't know what's effective.
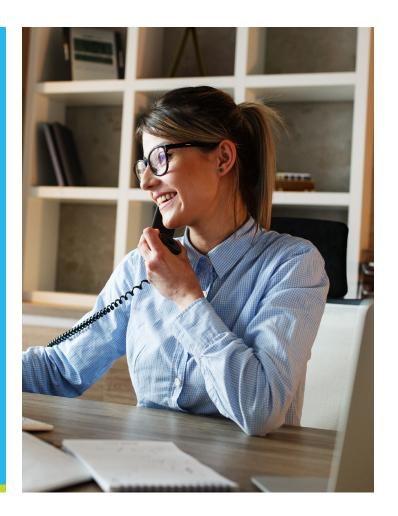**Solution: A CRM clearly shows what's working and what's not.**

Good pre-call planning and good post-call planning are a cycle, where a good post-call plan leads to the next great pre-call plan. This allows you to see what's effective and what needs tweaking.

Lee advises that, before a call, have a solution in mind that you're going to present, with questions already mapped out leading to that solution. She admits that sometimes, however, it might not be the right solution, and you need to be prepared for this. "Things change and sometimes the journey shifts and that's okay," she says. "But it should still be documented in your CRM as part of this pre-call plan." Post-call, you should document what happened, with whom, and what actionable steps will happen next time.

"A CRM provides a path from pre-call planning through the sales call through the post-call documentation for every single interaction," Lee explains.

Measure Your Success

> Determine your KPIs (Key Performance Indicators)
> Set up a dashboard and focus on those key metrics
> Use external data sources when possible (Google Analytics, Facebook Analytics, Facebook Pages Manager App, etc.)
> Ask at admission how the patient learned about your organization and monitor what's working
> Track and measure your digital marketing (It's easy and mostly free!)
> Trend your referrals/admissions to your activities and monitor the sources of new business and growth opportunities
> Survey your team, customers, and community

Technique

Problem: Difficulty spotting challenges until they're full-blown problems.
Solution: A CRM makes reporting easy, allowing you to identify issues as they arise.

Imagine this scenario: Your objective might be just to find out who calls in the referrals. In the CRM, you see that the salesperson went to the physician's office eight times and has never gotten past the window. The issue: He's probably trying to call on the physician when he should really be trying to call on the decision-maker who sends the referral to a provider.

That's where managers should be using the CRM, says Lee. If you're looking at the account and see that eight sales calls have been made with no connection, there was no success.

"There's a coaching opportunity to say to your salesperson, 'Who calls in the referrals?'" says Lee. "That should be your number one objective, so let's work together on finding out who that person is."

According to Lee, the person in charge of development should spend at least 50 percent of time in the field coaching across all roles directly involved with growth. "That's where the real magic happens," she says.

Problem: Communicating an undefined value proposition.
Solution: A CRM helps you become a valuable resource for your customer.

It's only a value proposition if it's a benefit and a priority to your customer, notes Lee. "Our industry is very good at talking about all the great things that we do for our referral partners and the communities we serve, but we rarely talk about what that means to the customer," she says. Whether that customer is a referral partner, a community partner, or a patient, you have to define your value propositions for the audience and ensure your people are able to articulate what that value proposition is.

The best way to approach needs-based selling? Ask smart questions, present benefits, and start with the solution in mind.
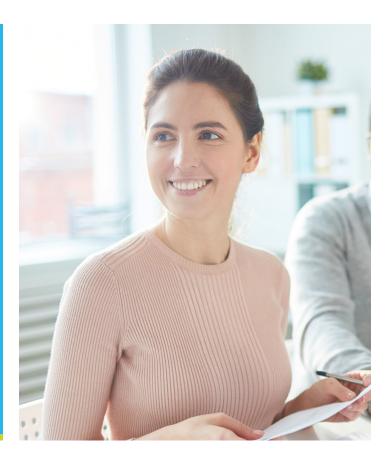
> "If you don't know what the needs are, it's really hard to articulate a value proposition to meet those needs. That's where the CRM data is invaluable because you can form those strategies around these needs at the beginning."
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> **-Melynda Lee, MBA**
> *Director, Growth Solutions*
> *Simione Healthcare Consultants*

Marketing Best Practices

> Have a manageable plan with measurable objectives

> Always be customer-centered with your value proposition

> Use calls to action in messaging

> Be visible in your referral sources' offices and also in the community at large

> Pay attention to how your competition markets

> Scan the marketplace for changes and act swiftly

> Budget and plan thoughtfully each quarter

> Take advantage of available resources

> Thank your customers, but not with gifts

> Measure and celebrate your success!

A CRM solution can help alleviate the common challenges to sales and marketing in post-acute care by streamlining efforts, boosting productivity, and capturing the key data you need to drive strategic decisions. Tapping into this powerful technology to help with territory management, call volume, and sales technique can fuel your agency's growth.

Need help finding a CRM solution and integrating it with your sales and marketing? Put the expertise of our Growth Solutions team to work for you.

PlayMaker HEALTH
The Post-Acute Growth Platform

PlayMaker Health's post-acute software transforms provider claims data into actionable business insights. Integrating within existing systems and industry workflows, the platform and mobile-first CRM unify market, sales, and performance data, delivering the visibility and intelligence providers need to increase sales and expand competitive market share. Visit **www.playmakerhealth.com** or call **866-930-6847**.

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