



CENTER FOR APPLIED SALES RESEARCH

“Professional Referral Opportunity Development” (PROD)

Please note: Items that are completed with ... or ...? are intentionally incomplete to protect CASR proprietary content.



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Introduction of Material

- Target User
 - Community DCR
 - Supported by ADSM

- Purpose

- Establishes a framework for developing and growing professional referral sources
- Provides general direction and guidance on 'How To' elements of successful professional referral networking

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Building A Relationship

- The PROD program is designed to build a mutually beneficial relationship between the DCR and Health Care Professional

- Exchange...

- trust built on timely and accurate information

- ...

- roles growing beyond titles

- Ex. DCR becoming an information resource to the HCP

- benefit delivery

- Appropriate...

- Referrals for the DCR

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Relationship Development Approach

- **Targeting**
 - Select those ...
- **Planning**
 - Qualify ...
 -?
 - Identify ...
- **Relationship development**
 - Establish...
 -?
- **Follow up**
 - ...?S
 - Record and

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Program Objectives



PROD Objectives

- Provide DCR capability to generate significant qualified target customers at a very effective cost per move in
- Develop a scalable, sustainable Professional Referral development process that enables the community to harvest the opportunity for qualified resident move-ins
- Leverage the trust, timing, experience and efficacy of the Professional Referral into a comprehensive, integrated overall local marketing approach

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Targeting



Targeting

- **Professional Referral Sources With Immediate Needs**
 - **Health Care Professionals:**
 - H....
 - ...?
 - Retirement Homes and Communities
 - ...?
 - Family Physicians
 - ...?
 - **Competition ...**
 - **Non HC Professionals**
 - Area...
 - T....

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Targeting

- Professional referral sources with less immediate needs
 - Health Care Professionals
 - P...
 - ...?
 - P...
 - Non-Health Care Professionals
 - H...
 - W...
 - ...?
 - Employee...
 - ...?
 - L...

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Prioritizing the Targets

- Identify and select priority organizations from lists of
 - Priority Account List *provided by HQ marketing*
 - Internet WEB sites:
 - Local market data ...
 - Account profile...
 - Professional profile and planning tool or Pivotal/REPs
 - Weekly/Monthly...

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Targeting-*Hospitals*

- Hospitals with most historic resident referrals
- Hospitals with:
 - More...
 - Close...
 - Geriatric
 - Large upscale...
- Medical...

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Targeting- *Group Practices*

- Prioritize based on size, age and type of practice
 - **Group practices...**
 - **Large...**
 - **Chronic...**
 - G...
 - P...
 - P...
 - P...
 - P...
 - O...
 - R...
 - Etc.
 - **Older, well established...**
 - **By location**
- Pick the Top 25 as a start, *add the next 25 as you succeed*

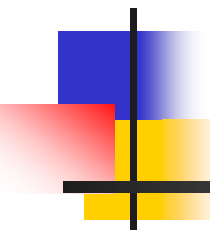
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Targeting- *Individual Physicians*

- Physicians with...
- Physicians...
- Physician contacts, visited community, attended educational programs, etc
- Physicians...
- Physicians...
- Physicians...

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Planning



Know Your Audience

- HCPs involved in identifying the need for assisted living
 - D...
 - H...
 - S...
 - P...

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- Understand their...
- Understand their...
- Know their priorities in assisted living facilities
 - C...
 - R...
 - P...
 - S...
 - S...



Planning for-Hospitals

- Who to see in the hospital
 - C...
 - D...
 - S...
 - H...

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- Determine amount of time needed for each hospital
- Determine....
- Are there opportunities....?
- What...?
- What ... need to be reviewed?



Planning for- Group Practices

- Who to see in the office?
 - Physicians, office managers, nurses
 - Make appointment...
 - Ask: who...?
 - Ask: who...?
 - Ask: how...?
 - Set up...

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Plan for Success

- Planning
 - Establish goals
 - Prepare Discovery
 - N...
 - K...
 - K...
 - P...
 - S...
 - C...
 - Confirm...
 - Schedule...
- Initial meeting
 - Build...
- Tips
 - Be persistent, ...

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Key Meeting Materials

- XYZ Reference Guide
 - a complete, up to date reference ...
 - Supports...
 - updates driven by...
 - Reference Guide *is not a leave behind for the HCP*
- Referral facts, contact outcomes and referral results
- Reminder leave behinds
 - F...
 - P...
 - A...
 - C...

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Reference Guide Content

Review of XYZ offerings

- A...
 - U...
- Services
 - L...
 - S...
- Nursing coverage
 - H...
- Admission & Retention policies
 - Resident...
 - D...
 - A...
- Price/Value
 - C...
 - vs. ...

XYZ Benefits

- C...
- L...
- XYZ S...

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Information Beyond Referral Statistics

- HCPs such as Discharge Nurses are ...
- The DCR should ...

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“Even if some facilities embody the key tenets of assisted living’s philosophical model, that is, policies emphasizing autonomy, dignity, and service flexibility that facilitate maximum independence and aging-in-place, the degree to which this model predominates the industry is unknown.” *National Study of Assisted Living for the Frail*^{Elderly, 12/99}

Time Management Guidelines

	Meetings	Events
Non Health Care Professionals	X%	X%
Health Care Professionals	X%	X%
Non Professional (Residents & Customers)	X%	X%

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Planning

Number	Priority	Gave Referrals	Call Frequency
X-X	A	X days	Once/ X days
X-X	B	X days High Potential	Once/ X days
X-X	C	X days	Once/ X days

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Relationship Development



Successful Relationship Development

- Have...
- Meet...
- Build...

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- Be...
- Be...
- Keep...
- Meet...



Partnering Attitude

- Seek...
- Serve...
- Focus...

■ Be a
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■ Develop...



Meeting each others needs

- Physicians' needs:

- Long...
- Growing...

- Hospital Discharge Professional needs:

- Making...
- Meeting...

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Foundation of Trust

- Demonstrate your ...
- Base your...
- Know...
- Resolve...

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Successful Partnering

- Goals for face to face meeting:
 - Establish...
 - Ask...
 - Listen...
 - Build...
 - Create....
 - Schedule...

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Meeting With The Professional

- P...
 - Build ...
- P...
 - Identify...
 - Establish...
 - They need ...
 - Share...

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- Meeting...
- Gaining...



Meeting With The Professional

- Be...

- Be...

- Be...

- Be...

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- Bring...

- Be a ...

Discovery—

from Health Care Professionals

- What are the major characteristics ...?
- ...?
- What are they least....?
- ...?
- Is that adequate to...?
- ...?
- Who do you consider ...?
- ...?
- What are your criteria ...?
- ...?
- What is your ...?

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Discovery— *from Discharge Planners*

- How many...?
- ...?
- What were their ...?

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- How did this ...? Your ...?
- ...?
- If you could ...?
- ...?



HCP Discovery— *from Adult Children*

- What are their ...?
- ...?
- Do you see many ...?
- ...?
- What is their greatest...?
- ...?
- Are they able to ...?
- ...?
- What help is?
- ...?
- Should they ...?
- ...?

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HCP Discovery—*from Seniors*

- What are some of the ...?
- ...?
- What are the challenges they ...?
- ...?
- When dealing with early ...?
- ...?
- How is dementia?
- ...?
- What things do you hear that ...?
- ...?
- Is that view ...?

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Discovery—

Care-giver at hospital discharge

- How many times have you ...?
- ...?.
- Who will take ...?
- ...?
- What services would give ...?

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Key Information Details

DCR/DMR Key Referral Source Profile Form

Instructions: To be completed by the DCR/DMR and used as a reference tool by the DOS/DMR to better serve external customers. Complete (minimally) with all A accounts. DOS/DMRs are to place in a binder to reference during calls by referral sources. Update on a routine basis (quarterly) together.

Date Completed _____ Date of Team Review _____

Name of Account _____ _____ _____	Address _____ _____ _____	Phone # () _____ Fax # () _____ E-mail _____ Beeper # _____ Best Way to contact them _____
What is their Specialty? _____ _____ _____	How does this customer like to be addressed? _____ _____ _____	Best time of day to contact this referral source. _____ _____ _____
Why will call referral to Site? What do you know about this person? _____ _____ _____	What do you want to know about this person? _____ _____ _____	What are their hobbies or interest? _____ _____ _____
Current Situation – Summary of the account? _____ _____ _____ _____ _____	Desired Situation – What do they want? _____ _____ _____ _____ _____	Relationship to Site <input type="checkbox"/> Physician Advisor <input type="checkbox"/> Consultant <input type="checkbox"/> Community Service Council Member (CSC) <input type="checkbox"/> A Resident's Physician <input type="checkbox"/> A new A account to Site <input type="checkbox"/> Specialty Support Group <input type="checkbox"/> Other
Maintain – What level of communication do they want? _____ _____ _____ _____	Gain – What are their hot buttons? _____ _____ _____ _____	What service/issues are disturbing/frustrating to this customer? _____ _____ _____ _____

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Developing the Relationship

- Understand professional needs, bring information of value
 - Patient....
 -?
 - Consumer information on...

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Relationships based on mutual needs

- What are their patients
- ...?
- Cost of not ...)

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- Use resident....
- Ask: ?"



On each referral meeting

- Re-establish ...
- ...?
- Communicate relevant ...

■ Discuss ...
■ Respite ...

- ...?
- Ask for ...
- ...?

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Seek a commitment

- Ask for the referrals !!!

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Commitment Questions

- Based on our discussions, ...?
- ...?
- Based on our conversation, I hope that
- ...?
- Since we've agreed that there ...
- ...?

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Follow Up



Follow up

- Is this type of ...?
- How frequently ...?
- ...?
- Are there other ...?
- May I use ...?

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Resident/Medical Practice Follow-up Appointment Strategy Steps

1. List of Resident, Dr. and Medical Practice

- Check with ...

3. Set the appointments using the following approach.

Do not deviate from this approach. Practice it until

you can do it comfortably, where it sounds like you

are saying it for the first time. They will probably ask

you what the appointment is for - just

4. ?.

5. Use this approach. Do not CHANGE it -- PRACTICE it. It WORKS!!

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The Medical Practice Patient/Resident Follow-up Visit - Appointment Setting

- Setting the Appointment either on the phone or in person.*

- This is _____ calling from _____ the assisted living community on Sycamore Street...

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- Mrs. _____, is a patient of Dr. _____'s

** Determine the office appointment hours first before beginning this approach*



The Medical Practice Patient/Resident Follow-up Visit - PPP

- Good afternoon Dr. _____, I'm _____ the Director of Community Relations from _____ the assisted living community on _____

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- I have ...
- [example: Mrs Doe...]
- Dr. can you tell me - (move to questions on the next page)



Discovery

- In what ways is Mrs. _____, ...?
- ?
- Dr., what ...?

■ ...?
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■ Dr., one last question - what do ...?



Discovery Agreement & Next Steps

C...

- Let me just briefly summarize what we have discussed:

- The biggest ...
- Your ...

D...

- We can best ...
- What we ...

N...

- Dr., based upon what ...

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Follow up

- Am I ...?
- ...?
- What are my ...?
- ...?

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