More Winning Strategies For Driving Referral and Revenue Growth

+ Four Myths That Are Killing Your Business

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Who We Are

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More Winning Strategies to Drive Referral & Revenue Growth – M. Wilson / T. Ritchie
Overview

• Home Care leaders and sales/marketing professionals will learn proven strategies for driving referral and revenue growth in today’s competitive marketplace.

• These winning strategies combined with 4 common myths that can potentially create barriers to achievement are part of a successful sales and marketing training program currently used in markets throughout California.

• Learn how agency culture affects referral development and customer satisfaction.

Learning Objectives

• Learn strategies for increasing the overall effectiveness of sales and marketing efforts.

• Understand the role organizational culture plays in shaping brand value.

• Learn to diagnose and problem solve in order to move from transactional business to strategic partnerships with referral sources.
Sales

Sales/Marketing

• Make a Choice
  – Transactional vs. Strategic Relationships

• Transactional
  – Commoditization of Home Care and Hospice
  – Self Serve Mentality
  – You’re In The Agency Rotation

• Strategic Relationships
  – “Why” not “What”
  – Value Driven
    • Requires guidance by professional business partner.
    • Focuses on solutions connected to the referral sources unique situation.
## First Law of Sales
- Create value for someone else

## Value
- Expected
- Achieved
- Measured

## Listen

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### Karl Menninger

Karl Menninger, renowned psychiatrist and author of the book, “The Human Mind,” wrote this back in 1930:

*“Listening is a magnetic and strange thing. It’s a creative force. The friends who listen to us are the ones we move toward. When we are listened to, it creates us, makes us unfold and expand.”*
Winning Strategies

1. Discover + Design = Solve Problems and Create Value

2. Guiding Decisions and Managing Expectations

3. Measure and Report Results And Achieve Preferred Provider Status

Winning Strategy #1: Discover Problems + Design Solutions = Solve Problems and Create Value

- The Great Commoditization Challenge
  --My agency BLAH BLAH BLAH BLAH BLAH....
  --Needs Analysis (I ask you about your needs)
- Problem?... What problem?
  --Problem Discover to Problem Solve.
  --When you treat me like everyone else...I'll treat you like everyone else.
  --Don't give me your "one size fits all" solutions in search of a problem.
  --Help me see the gaps and issues I don't even know I have. (I don't know what I don't know)
Winning Strategy #2: Guide Decisions and Manage Expectations

- Different Views
  - Just because we see need doesn’t mean they see need.
  - The challenge: Fear of not knowing creates control issues for referral sources. Not understanding makes them feel vulnerable.

- The Un-Salesperson
  - Building relationships based on trust and cooperation.
    - Avoiding the position of certainty. (This is what you need)
    - I don’t know the answer
  - Do the opposite

- Stop Acting Like Everyone Else
  - Set aside the traditional model and replace with collaborative processes and shared outcomes.
  - Shine some shoes.

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Winning Strategy #3: Measure and Report Results

- Promises Made, Promises Achieved…Or Not.
  - Transparency supports our role in the strategic relationship.
  - Meeting or exceeding expectations provides a basis for new opportunities and improved results for referral sources.
  - Creates barriers to competitors.

- Preferred Provider
  - Takes an active role
  - Sees from the eyes of the referral source
  - Is always “in the know” about significant changes that may affect referral sources.

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Strategy-Culture Connection

• No matter how fancy, intelligent, and timely your strategy is…your culture has the potential to undermine it.

Outside Image Reflects Inside Character

• Brand is just a lagging indicator of culture.

• You cannot have an internal culture that is different than the external image because promising one thing and delivering another = integrity gap.

• Marketing materials and sales slogans that promote unrealistic commitments that are not practiced inside the agency = lipstick on a pig.
What Happens Inside the Agency…Is Reflected in the Community

• Translation: How we work together in our Agencies is a prime driver in how our sales, marketing, and clinical staffs perform in the community

• The healthy leadership and organization development practices that Home Health and Hospice Agencies can practice include:
  – Honest communication about small failures;
  – Willingness to share accountability at every level;
  – Mutual respect for roles and contributions; and
  – Everyday talk about the changing conditions in the field.
Internal Obstacles and Challenges that impact Agency Culture

- Staff Operate in Silos (Intake, Clinical, Sales)
- Shouldn't Sales People Be Clinicians?
- Incentives – Patient Care or $$$$$$
- Communication – It's not my job!!!
- That's my patient!!!
- Us vs. Them
- I don't have any patients today, what is the sales team doing about it?

The Solution......
A Common Purpose

- A mission that puts all staff on the same page and that everyone can stand behind and believe in.
  - What get's you up in the morning.
  - Real/Genuine
  - Memorable
  - Deliver Everyday
  - Passionate About

- Core Values
  - The values that drive our mission and what we do everyday
  - Important and we never waiver
  - Use to test key decisions, development of new programs, and mediate conflicting viewpoints
For Wilshire

• Our Mission is to help people live a better life.
• Our Core Values:
  – We focus on our patients, clients and community.
  – We serve with integrity, innovation and trust.

4 Myths That Are Killing Your Business

1. The In-Service Lunch
   – Why you don’t and won’t ever see results.

2. Pens, Pads and Pound Cake

3. The Relationship Myth

4. The Faulty Assumption
   – They Know Us…They Love Us…and We Know Them Well
   – Over Relying on Past Success

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Myth #1: The In-Service Lunch

- The Teacher/Student Scenario
  - Educate or Differentiate?
  - Is anybody listening?

- Agency Focused
  - Impressive….but does this apply to an issue I’m experiencing?

- It looks and sounds amazingly similar to every other in service lunch we’ve had. Are you looking or sounding any different than anyone else?

Myth #2: Pens, Pads and Pound Cake

- Promotional Product Giveaways.
  - How will you utilize and what’s your ROI expectation
    - Referrals?
    - Web traffic?
    - Brand awareness?

- The “Get Our Name Out There” Myth
  - The long long long long shot.
  - How many others are doing it?

- Hand Me My Crutches Please.
Myth #3: The Relationship Myth

• True or False
  – Building relationships is important.
  – Relationships are the most important element of referral development.
  – “I’ve got great relationships with referral sources therefore I will get referrals.”

• Personal
  – Trust
  – Credibility
  – Dependability

• Professional
  – Understands referral sources challenges
  – Able to design solutions that create value
  – Acts as a business partner and resource

Myth #4: Faulty Assumptions

• They Know Us…They Love Us…And We Know Them Well.
### Faulty Assumptions

<table>
<thead>
<tr>
<th>Dangerous assumptions we make:</th>
<th>Dangerous assumptions others make:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• We know our customers’ needs</td>
<td>• They don’t care about our needs</td>
</tr>
<tr>
<td>• We know what our customers value</td>
<td>• They only want our referrals</td>
</tr>
<tr>
<td>• We know how customers perceive us</td>
<td>• It isn’t worth giving them feedback</td>
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### Faulty Assumptions: Over-Relying On Past Success

- When is success the first step toward failure?
  - When we establish routines and expectations around a singular win...as the world changes, we don’t evolve with it.

- What do Microsoft, GM, and Starbucks have in common?
  - The biggest and the best turned into irrelevant, massive re-organization

- Signs that you may be over-relying on past success...
  - When all you do is change the title slide on your power point presentation
  - When you say “I’ll prep for the presentation in car ride over”
  - When you walk in the door with no research or intelligence in-hand
  - When you say “they already love us, so we don’t need to worry”

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Meet Joanne…

- Top rep in the Agency, asked to “share her secrets” with new trainees

1. I engage with my coworkers (intake and clinical) regularly so I know what their daily challenges are;
2. I dig into our services and take time to learn about and understand disease processes as they relate to the effects on our patients;
3. I speak fluently about the care delivery provided by our Agency, which means I can hold my own with discharge planners, physicians, as well as patients and caregivers;
4. If I don’t know, I never fake it. I say “That’s a good question; let me look into it to provide you with the best answer by the end of today;”
5. In every meeting with a prospective new referral source, I always ask two questions: 1) What has your experience been with home health and hospice? and 2) What do you find most difficult as you manage the day-to-day demands of patient care?; and
6. Then I simply listen…I don’t say another word unless it relates to their response; anything beyond what matters to them is “just a sales pitch.”

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Top 10 Things Agencies Say To Avoid The Changes They Need to Make

10. Our agency is the best! Things will get better. We just need to get the word out.
9. We have 15,000 brochures left. We’ll discuss it after we’ve used them all up.
8. Our referral sources already know we’re good… why else would they refer to us?
7. Hey…I’ve been to that SNF every week and they still don’t have any patients.
6. Damn that ObamaCare.
5. If we just had more pens to give away. People loooove our pens!!
4. We’re too busy right now. We’ll consider it when we’ve got more time.
3. Damn that ObamaCare.
2. This is the way we’ve always done things.
1. All the other agencies suck! We’ve got nothing to worry about.

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Final Thoughts

• Those Questions and Actions That Create Value

• We’ve Got A Choice To Make

Discussion + Q & A

• Open Discussion

• Q & A
Presenter Information

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+
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