MARKETING TO HEALTH CARE PROFESSIONALS

>Marketing 101 Tutorial
Relationships with other health care professionals, such as primary care physicians, nurse practitioners, psychologists, dietitians, and others can be essential to the growth and health of your practice.

How can you develop an effective marketing strategy that targets potential referral sources?

Define your practice.

One of the most important steps in developing and marketing your practice is to define the services you can provide to the community. This decision should be based upon your clinical expertise, special interests, available resources, and the needs of your community.

Many practices define their services through the development of a mission statement as a part of their strategic planning process. Others take a more informal approach. The important point is to define the services you provide that are either not currently offered in your marketplace or are offered but not as effectively or efficiently as your practice can provide them.

Consider using a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis to help you decide which services to offer.

<table>
<thead>
<tr>
<th>Internal</th>
<th>External</th>
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<tr>
<td><strong>What do we do well?</strong>&lt;br&gt;i.e. We see more pediatric patients than any other practice in the region; we partner with the local AAA baseball team; we have a very high patient satisfaction rate</td>
<td><strong>What external trends or conditions can we capitalize on?</strong>&lt;br&gt;i.e. There are no other practices in the region focused on geriatrics; more patients need cardiac PT than ever before</td>
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<td><strong>What do we do poorly?</strong>&lt;br&gt;i.e. Our hours are not convenient for many patients; we don’t have many repeat referrals from physicians; we have limited experience compared with our competitors</td>
<td><strong>What external trends or conditions should we be wary of?</strong>&lt;br&gt;i.e. Reimbursement levels are declining; PCP’s are offering PT in-house</td>
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Define your target audience.

The services you are providing will determine where you need to direct your marketing. Consider the importance of targeting primary care providers, based on APTA's research. Also, consider including APTA’s “Move Forward” brochure on the benefits of physical therapist services in your marketing materials, available at www.apta.org/prmarketing under “Reaching Consumers”/Brochures and Handouts.

- Primary care physicians and nurse practitioners have limited knowledge of the depth and breadth of what physical therapy can achieve, compared with other providers, yet they have a favorable impression of physical therapists.
- Almost all consumers start with their primary care provider when they have pain or mobility concerns (94%).

Invite feedback.

Once you have determined your target audience, invite them to give you feedback on the programs you are planning for your practice.

- Make personal visits to potential sources of referrals to determine their interest in and need for your services. Find out about their needs and those of their patients and clients. Not only do you gain insight, you also begin to build a relationship.
- Hold focus groups of patients, health care professionals, or community leaders to help you make decisions on the services you plan to offer. Focus groups are an effective way to answer questions about pricing, scheduling, office layout, and to test ideas.
- Conduct surveys of members of your target audience. These may be electronic, written, or verbal. Surveys can help you get feedback when the respondent wishes their comments to remain anonymous.

Conduct a competitor analysis.

A competitor analysis involves collecting information on the services being provided in your area. The competitor analysis can be conducted either formally or informally through phone calls, internet research, or visits to your competitors. Some examples of the questions you will want to answer are listed here:

- Who is offering this service?
- How well is the service being provided?
- What are the qualifications and educational backgrounds of those providing the service?
- What are they charging for the service?
- What are their hours of operation?
- Are they successful?
- Can you do it better?

Also, make note if no one is providing the service and consider the potential reasons. Is it because it’s not a good idea — or has no one thought of it yet?
Develop a plan.

It's important to start with a written marketing plan that sets simple, realistic goals for how you are going to establish and keep credibility, generate interaction, and gain commitment and loyalty from your community, other health care professionals, and referral sources. Without a marketing plan, you become "reactive" to the marketplace, and may spend extra dollars that don't add impact. For example:

Goals: Desired outcomes ("What")
- Example: Increase patient volume by 20% in one year.

Strategies: Key activities to enable the achievement of these goals ("How")
- Examples:
  - Develop health care professionals contact list.
  - Reach out to contact list on a quarterly basis.
  - Develop strong relationships with 3 – 5 health care professionals by seeing patients with them in their offices or by inviting them to your clinic to discuss the latest research and best practices.

Action Plan: Specific initiatives for implementing strategies
- Examples:
  - Research local targets using a Web-based health care provider directory.
  - Develop an introduction letter and phone script.

Measures: Metrics & milestones
- Example:
  - Identify 5% volume increase within the first quarter.

Written Marketing Plan.

This framework is designed to help you build relationships that will lead to increased referrals with health care professionals, especially primary care physicians and nurse practitioners. Research conducted by APTA indicated that the greatest marketing opportunity may be in a primary care setting:

- Primary care physicians and nurse practitioners have limited knowledge of the depth and breadth of what physical therapy can achieve, compared with other providers, yet they have a favorable impression of physical therapists.
- Almost all consumers start with their primary care provider when they have pain or mobility concerns (94%).

EXAMPLE TARGET AUDIENCE
Primary care providers

EXAMPLE GOAL
Increase volume of referrals from primary care physicians and nurse practitioners by 10 percent within one year.
EXAMPLE STRATEGIES
- Focus your efforts:
  - Build relationships with referral sources at the five largest primary care practices within a five mile radius.
- Consider the needs and wants of your target audience:
  - Educate referrers about how you can make their job easier and patients happier.
  - Provide referral tools that make a referral easier for the health care professional and the patient.

EXAMPLE ACTION PLAN
Build relationships with referral sources at the five largest primary care practices within a five mile radius.

Step #1: Conduct research:
- Identify the largest practices within a five mile radius.
- Create a referral source spreadsheet with practice contact information.

Step #2: Create relevant outreach materials:
- Develop an introduction letter to send to the health care professional (and copy his/her office manager). See sample letters to physicians below.
- Create a phone script for initial contact with health care professional.

Step #3: Begin outreach:
- Contact health care professional/office manager to set up meeting to discuss patient referral needs.

Step #4: Develop an ongoing relationship:
- Visit the practice to learn more about their patient needs.
- Invite health care professionals to participate in events throughout the year. For example:
  - Invite them to receive a free assessment and provide several “free assessment” cards for them to pass on to family, friends, colleagues, or patients.
  - Set up an annual dinner/meeting with the health care professional (and consider inviting office staff) to discuss their continued needs and review the latest relevant findings in physical therapy.
  - Plan an event for National Physical Therapy Month and invite them to join you.
- Conduct “Quality Checks”:
  - Contact the health care professional or office manager on a quarterly basis to confirm that they are pleased with their patient outcomes and level of service.
- Show appreciation:
  - Purchase a vase or candy dish and replenish with flowers from a local florist or candy every two weeks. A “Compliments of X Physical Therapy” plaque should be affixed to the vase or dish.
  - Send a thank you card for every new referral.
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Sample Letters to Physicians

Sample #1

Date

Dear Dr. Smith,

Are your patients struggling with pain and impaired motion? When you diagnose these conditions, where do you refer them?

I’d like to set up a time to meet with you to discuss your patient referral needs and better understand how my physical therapy practice can support a shared goal of creating happier, healthier patients.

We define success as freedom of motion and freedom from pain. We accomplish this by:

- Making your patients a priority so you can focus on caring for your other patients
- Working with you as a team to develop the patient’s treatment plan
- Utilizing the latest research and proven techniques to ensure positive therapy outcomes

Our practice is dedicated to getting results, so you can be sure your patient will be satisfied when they return to your office for a follow-up appointment.

I will contact you or your office manager within the next week to set up a 15-30 minute meeting to discuss your practice’s needs.

Sincerely,

Physical Therapist, Credentials
X Physical Therapy Practice

CC: OFFICE MANAGER
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Sample #2

Date

Dear Dr. Smith,

Are your patients seeking freedom of motion and freedom from pain? Did you know that a physical therapist can help restore and improve motion to help them achieve long-term quality of life?

I’d like to set up a time to meet with you to discuss your patient referral needs and better understand how my physical therapy practice can support a shared goal of creating happier, healthier patients.

We work with primary care providers as a team to develop a patient’s treatment plan, using the latest research and proven techniques to ensure positive outcomes.

Your patients will receive quality, personalized care, so you can be sure they will be satisfied when they return to your office for a follow-up appointment.

I will contact you or your office manager within the next week to set up a 15-30 minute meeting to discuss your practice’s needs.

Sincerely,

Physical Therapist, Credentials
X Physical Therapy Practice

CC: OFFICE MANAGER

Educate referrers about how you can make their job easier and patients happier.

Step #1: Develop marketing tools that define what differentiates your practice:
  o Use the introduction letter (template provided by APTA) and copy on your Web site that reflects the brand.
  o Focus on messages that demonstrate the following:
    ▪ Their patients will feel better faster because of your specialized expertise (use patient testimonials* and practice and/or general physical therapy data supporting strong outcomes).
    ▪ That their referrals will be a top priority in your office (communicate a simple referral process).
    ▪ Your staff’s caring treatment will make the referring doctor look good (explain how your approach results in a better patient experience).
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Step #2: Communicate these messages in all outreach to health care professionals – phone calls, letters, meetings and brochures. Consistency is key.

Step #3: Identify their preferences for receiving information.
  - During your meeting, ask them if they would be interested in receiving new research about physical therapy for specific conditions and whether they prefer to receive information by fax, e-mail or mail.

*Be aware that HIPPA regulations apply

**Provide referral tools that make a referral easier for the health care professional and the patient.**

Step #1: Utilize APTA’s “Move Forward” brochure for distribution to their patients. This brochure may be modified with information specific to your practice, such as:

  - Directions
  - Contact Information
  - Specialized Expertise
  - Patient Testimonials
  - Web Site URL

Step #2: Use the Web site templates provided by APTA to develop a robust site with the following information:
  - Contact information
  - Hours
  - Why choose physical therapy?
  - Our staff
  - Our approach
  - Patient testimonials

Step #3: Offer to update or provide home exercise protocols for health care professionals to use in their practice, and include your practice’s contact information on the materials.

**MEASURE**

It is important to regularly check your progress. Considerations include:

  - Did you do what you said you were going to do?
  - What sort of feedback are you receiving during Quality Checks with your referral sources?
  - Have you seen an increase in referrals (track and review each month)?
  - Has the increase resulted from targeted referral sources?

**Create a year-long marketing calendar to help you realize a cost-benefit ratio that will benefit you and your practice:**
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Make sure you have the right tools.

It is ineffective to call on a health care professional unless you have the right tools to facilitate a referral, such as:

- Clinic/practice business cards.
- APTA customizable “Move Forward” brochure about physical therapist services.
- A professionally-developed Web site with more information about your practice, including patient testimonials. See APTA “Move Forward” Web site templates under “Reaching Consumers/Tools to Market Your Practice” at www.apta.org/prmarketing.

Creating tools that make life easier for the health care professional can be very beneficial.
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- Consider providing a calendar for health care professionals to give to their patients as a way for patients to record their PT visits.
- Health care professionals who refer frequently to your practice may appreciate a “Rounds document” or summary sheet of all of their patients currently receiving care at your practice.
- Consider producing referral forms containing the contact information of your facility.

**Answer the question, "What’s the benefit to the referral source?"**

What do health care professionals want to know about your practice?

- You achieve high patient satisfaction and provide quality care. You rely on proven treatment techniques and achieve positive outcomes.
- You and your staff provide cost-effective treatment that will help the patient achieve improved quality of life.

**Key Messages**

Messages must:

- Be relevant to the target audience (i.e., written from their point of view)
- Establish need, benefit and action
- Not exceed 2-3 key take-away points

Following are overarching key messages for health care professionals:

*Physical therapists help you restore and improve motion in your patients to achieve enhanced quality of life.*

**General Motion**

Physical therapists create happier, healthier patients.

- Patients seek freedom of motion and freedom from pain.
- Physical therapists are a critical component of patient care.
- Freedom of movement allows patients to perform the activities they love.
- Patients doing the activities they love results in healthier lifestyles and enhanced quality of life.
- Visit www.moveforwardpt.com for helpful physician and patient information on physical therapy for different conditions.

**Surgery**

Physical therapists can help patients avoid the need for surgery by helping them regain freedom of motion and freedom from pain. If there is a need for surgery, physical therapists can help enhance its benefits by helping patients to:

- Regain strength, flexibility, and endurance much more quickly.
- Control pain more effectively.
- Return to normal activities faster.
- Prevent re-injury.
- Develop better health and fitness habits.
Injuries
Physical therapists can help speed up recovery from an injury by restoring freedom of movement and freedom from pain. They can help patients to:
- Restore strength, flexibility and endurance.
- Control pain more effectively, often decreasing the need for long term use of medications.
- Avoid surgery, in many cases.
- Avoid re-injury both during and after recovery.
- Develop better health and fitness habits.

Medical Conditions
Physical therapists help reverse the debilitating effects of many chronic conditions such as arthritis and diabetes. They can help patients to:
- Restore strength, flexibility and endurance.
- Control pain more effectively, often decreasing the need for long term use of medications.
- Return to normal activities.
- Stay as independent as possible.
- Develop better health and fitness habits.

Attention spans are short.
When communicating with health care professionals, keep it short. One physician said, "If I can read it from the time it takes me to walk from my own office to an exam room, you've got my attention — otherwise, it goes in the 'to read' pile and sits there till my assistant throws the pile out." Try to keep your communications to one page, and lay out information in a way that is graphically pleasing.

One way to increase your effectiveness is by developing a “Health Care Professional Profile” survey that asks the health care professional what information they would like to receive from you. This may contain 5-6 questions, including a box if they would like further information. For example, one question for podiatrists might be: Would you be interested in receiving studies on rehabilitation after Hallux Valgus surgery? PCPs may have questions such as, “Would you be interested in information on senior fitness, back and neck exercise?” etc. You can email, fax or mail this survey, but it’s best to deliver it in-person.

Rely on data.
Use data. If you can show results in a chart or graph, it will get their attention. Utilize PT and practice-specific statistics in your communication pieces. For example, “100% of our patients would recommend our clinic/practice to a friend or family member.”

Consider hosting a “Research Review” each quarter and invite health care professionals to come to your facility for dinner to hear about current literature on specific topics such as appropriate management of patients with adhesive capsulitis.
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Make sure you are living the brand.

The physical therapist brand relies on certain behaviors that are important to delivering on these promises. The brand was developed based on consumer research to appeal broadly to members, consumers, health care professionals and other key audiences. Is your behavior professional? And, is your environment clean and uncluttered? Do you take an entrepreneurial approach? Do your actions exude inspiration? Do you demonstrate knowledge, utilizing the latest research and findings (refer to www.apta.org to remain familiar with current trends)?

Review the Brand Guidelines and other APTA resources to make sure you are acting “on brand.” It is imperative to follow the Brand Guidelines for key messages, tone of voice, behaviors, brand colors, and more — whether you are creating your own materials or using APTA’s materials for health care professionals. This will ensure our audiences hear a consistent message.

Earn their trust – and keep it.

It is important to promise that patients who are referred to you will be a top priority for you and your staff, and make good on that promise. An effective way to demonstrate your commitment to health care providers’ satisfaction is a regular quality assurance check to make sure they are happy with your service. Meet at their office and talk to the office staff in addition to the referring health care professional.

When it comes to thanking referring health care professionals, it’s not about grandiose gestures, but rather a simple “thank you” that you deliver on a regular basis. Just make sure you familiarize yourself with federal and state self-referral and anti-kickback laws before providing gifts to current or potential referral sources. You can also send a simple and inexpensive “Thank You” card with every referral.* APTA has several resources on fraud and abuse that can help you ensure compliance.

The key to successful marketing is conducting the right research, creating a roadmap and then sticking to it. If you do, you’ll be well on your way to achieving your goals.

*Be aware that federal and state regulations apply such as self-referral and anti-kickback laws as well as HIPAA regulations.