Marketing Your Organization
First Steps for Providers

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Objectives

- Breathe deeply together and relax in the face of unprecedented change, unknown and uncertainty.
- Tune in, turn on and engage our inner entrepreneurs and innovators

1. Establish a Shared Context
2. Assessment
3. Planning
4. Execution
5. Questions and Answers
The New Business Environment & Business Architecture

- Vision
- Business Plan
- Leadership
- Communication
- Transformation and Innovation Drive
- Marketing
- Payer/Patient and Funding Mix

- Management
- Staffing
- Workflow and Business Process
- Managed Care Functions
- Billing and Revenue Mgmt
- Integration

- Business Strategy
- Business Operations and Process
- Business Infrastructure and IT

- Hardware, Software, Networking
- Health Information Exchange
- Information Mgmt
- Data Analysis & Metrics
- Communications infrastructure
Paradigm Shift Hits the Fan!

- Meaningful Use
- Reform
- Medicaid Expansion
- Parity
- Health Insurance Exchange
- Block Grant
- Recession/Budgets
- PCMH
- ACOs
- ICD-10
- Integration
- HIPAA 5010
- DSM-V
- Workforce
Reforms

- Essential Benefits and MH and SUD services to be defined and mandated.
- All plans in the health insurance exchange will be required to adhere to Parity.
- Medicaid enrollees, including newly eligible childless adults, will receive adequate health coverage, including MH/SUD coverage.
- MH/SUD will be included in chronic disease prevention initiatives.
Reforms

- MH/SUD workforce included in workforce development initiatives.
- Prevention and treatment providers to be eligible for community health team grants aimed at supporting medical homes.
ACO

Structure, Governance and Shared Savings

IT Infrastructure and Data Management

Population Health Home

Long-Term Care
Public Health
Rx & Lab
Primary Care
Mental Health
Substance Use Disorder
Home Care & Hospice
Hospital & Rehab
Surgical & Specialty

Primary Care
Then & Now

Private Insurance
- DOI
- Employers
- Brokers
- Insurance
- Managed Care
- Networks

Publicly-Funded Treatment
- Federal Agencies
- State Agencies
- Counties and Cities
- Corrections & Courts
- Managed Care
- Prevention
- Networks
- Standards & Science

Managed Care Plans

Health Insurance Exchanges

75% - 90%

32+ Million Uninsured

10% - 25%
What to Expect

- More emphasis on mission-critical IT infrastructure, certified systems, and Meaningful Use
- More managed care and utilization review
- More medication assisted treatment
- More ACOs and Patient-Centered Medical Home (health home) models
- More Population Health Mgmt
- More Care/Case Mgmt
- More standardization and normalization
What to Expect

- More attention to Multiple Chronic Conditions
- More integration and innovation
- More electronic billing (electronic data interchange - EDI)
- More competition
- More affiliation and alliance
- More shared services
- More information management and reporting
- More storm before the calm (courts, mergers, budgets)
Opportunities for...

- Geographic expansion
- Service-line expansion
- New populations
- Integration, partnerships, joint ventures, mergers
- New approaches to reimbursement like Global Payments
- GROWTH!
Step One: Assess

Internal Structure, Practices, Processes and Performance

External Environment, Market, Partnerships, and Alliances
Internal Assessment

- Ownership Structure and Governance
- Board, Leadership and Management Teams
- Business, Marketing and other Strategic Plans
- Business Processes
- Contracts
- Finance (revenue cycle/revenue mgmt, reporting, compliance)
- Reserves/Capital
- Clinical Programs/Staff
- Quality Assurance
- Customer Service
- Managed Care/Care Mgmt
- Facilities and Infrastructure
- Information Technology and Telecomm
- Clinical Records and Documentation

**Internal Assessment**
Assess Environment

- National/State/County $$
- State Lawsuits, Medicaid
- Plans and Waivers, Health
- Insurance Exchange
- Be a part of the discussion
- Efforts to standardize and
  normalize
- Aligning incentives
- Clarifying scope of service questions
- Federal vs. State Laws and
  Regulations
- Financing the technology
  transformation
• Self-Insured Plans (ERISA)

• Traditional Indemnity (fully-insured)
  ◦ Open access, higher coinsurance

• Managed Care Plans
  ◦ MBHO (carve-out)
  ◦ HMO (network-centric, referral-based)
  ◦ PPO (wider network, medical necessity standards)
  ◦ POS (combines HMO and PPO with coinsurance differentials)

• Consumer-Directed Health Plans
  ◦ High deductible, catastrophic claims
  ◦ Health Savings Accounts (HSA), Health Reimbursement Accounts (HRA) and Flexible Spending Accounts (FSA)
Market Research
Sources of Valuable Information

- Health Plans and Managed Care Organizations
  - State Department of Insurance
  - AHIP and State Associations of Health Insurance Plans
- Self-Insured Employers
  - National and Regional Business Group on Health
  - Employers’ Health Coalitions
- Federal and State Agencies
  - HRSA, SAMHSA, NIDA, DOL, CMS, DOJ web sites
• Market Profile
• Payer Profile
Step Two: Planning

- Business Plan
  - Strategic Plan
    - Marketing Plan
    - Contingency Plan
      - IT Plan
      - Implementation Plan
    - Staffing Plan
  - Product/Service Development
    - Joint Venture, & Partnerships
      - Mergers & Acquisitions
Basics of Strategic Planning

- **Vision** – what will you become?
- **Mission** – how will you become what you envision?
- **Goals** – what incremental achievements will enable you to satisfy your mission?
- **Objectives** – what tactical steps will enable you to meet your goals?
Marketing Planning

- What are you selling? To whom?
- Why would they buy it?
- What are the advantages and benefits and inherent value that differentiates you from your competitors?
- How is your service priced? Why?
- Where are your services found? Is it convenient for your customers?
- How will your customers become aware of you and develop a preference for you?
- How will you approach customers who have a choice?
Marketing Planning

- Segment and Define Markets
- Identify and Define Prospects & Customers (lead generation)
- Identify Needs and Product Features
- Develop Unique Selling Proposition (USP)
- Develop Proof of USP (Return on Investment)
- Packaging (promotional materials)
- Promotion and Placement Plan (mailings, conferences and trade shows, etc.)
- Competitive Analysis and Intelligence (what makes us different? See USP above.)
- Develop Distribution Channels
- Develop Sales Approach (relationship management)
- Develop Pitch and Presentation
- Train and Develop Team
- Develop Network of Clients, Experts and References (testimonials)
- Develop Account Management and Technical Support to Up-sell/Cross-Sell

Marketing Planning
Market Segmentation

- Commercial Insurance / Public Funding
- Voluntary / Involuntary
- Geographic Markets
- Age
- Gender
- Specialty / Generalist / One-Stop Shop
- Race / Culture / Language
- Stand-Alone / Integrated / Joint Venture / Partnership
- Faith-Based
✓ What kinds of markets appeal to your organization?
✓ What suits your vision and mission?
✓ In what market segments do you have a good reputation? Market share/penetration?
✓ In what market segments do you/can you make a reasonable profit?

Market Segmentation
## Market Opportunity Matrix

<table>
<thead>
<tr>
<th>Market Segments/Services</th>
<th>Segment 1</th>
<th>Segment 2</th>
<th>Segment 3</th>
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<tbody>
<tr>
<td>Service 1</td>
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**Rank each according to:**

1. Market Maturity/Longevity
2. Brand equity or reputation
3. Revenue share (%)
4. Share of profits
5. Qualifications, skills, subject matter expertise and capacity to grow
6. Weaknesses, competitors and threats
7. Cost of entry
8. Legislative/regulatory opportunities
What is a Brand?

- **Brand**: the sum-total of the experiences, expectations and associations related to a product, service, or organization.
What is a Brand?

- Your words and actions are what people experience when they come to your facility
What is a Brand?

- Your words and actions are more memorable than any logo, slogan, or words on a poster
- You have the power to build a brand that offers real value to the people you serve

- What kind of Value?
How does my brand work?

- Value that can influence where people choose to go for health care...

- Value that can influence the quality of care they receive...
How does my brand work?

- Value that can influence the outcome of their care...their success in recovery...and how they feel about themselves and identify for many years to come
How does my brand work?

- With thoughtful positioning and consistent effort in building your brand, you can influence how your customers and colleagues experience your services
Brand Image

- **Customer Value Proposition**
  - Why should a person use your services?
- **Unique Selling Proposition**
  - Any aspect of your service that differentiates you
- **Differentiators**
  - How do these aspects make you different?
- **Emotional Branding**
  - Captivate the minds and hearts of your clients
- **Stickiness**
- **Appealing to Audiences**
Social Media

- Why are people attracted to social media?
  Trust, transparency, openness and honesty. They are seeking ongoing dialogue.

- How can social media work for your organization?
  You can increase public reach of your messaging.
  Create proactive media relations.
  Increase customer traffic.
  Build on your reputation.
  Develop a new avenue for services.
Social Media

- Create and define your social media strategy
- Set a timeline and focus on reasonable and practical goals
- Be consistent
- Analyze, measure and assess frequently
- Adapt

What will it take?
1. Commitment and desire to engage
2. Good strong content
3. Time and patience
Competitive Intelligence

What is Competitive Intelligence? Competitive Intelligence is information concerning one of our competitors that allows us to differentiate or modify our sales proposition. It may be information regarding:

- Key personnel
- Pricing
- Reputation
- Approach
- Methods
- Tools
- Results/Performance
Competitive Intelligence

What are you looking for?
- What do they do?
- How do they do it?
- Who are their customers?
- Who are key leaders?
- What is their reputation? Why?
- Are they doing anything innovative with pricing and payment?
- What tools and approaches do they use?
- How successful are they?
- How satisfied are their customers?
- What are their strengths? Weaknesses?
- Where are they going (mission)?
- Who are their partners/parents?
Networking with Influencers

- Contact opinion leaders and introduce yourself
- Send them some basic literature
- Ask them if you can help them and how. Be a resource
- If they have a blog or newsletter, subscribe and follow it
- Share your opinions
- Share articles you find
- Ask about partnership opportunities – don’t be shy!
- Ask about speaking opportunities
- Ask about collaborating on an article
- Ask for leads – “Do you know anyone who might benefit from the kind of service I/we have to offer?” This is normal for people in business.
New Conversations

- Hospitals
- Health Plans and MCOs/MBHOs
- Primary Care
- Third-Party Administrators
- Brokers
- Networks
- Employers
- Other Medical Specialists
  - Other state associations
New Conversations

- Professional
- Face-to-face
- Expressing willingness and interest
- Demonstrating *big picture* understanding and prospect of synergies
- Eager to develop viable, marketable, attractive solutions
- Promoting new services and potential new business model
- Clear, distinct, customer value proposition
- Benefits and advantages more important than features and functions
PR and Mass Communications

- Conferences (and not only those where you find yourselves selling to each other!)
- Community events
- Radio talk-shows
- TV (expert commentary)
- Newspaper column
- Web blogs, e-newsletters, white papers, case studies
- Sponsorship and philanthropic activities
- Advertising (lots of cheap ideas and opportunities)
Marketing, Diversification, and Affiliations

Step Three: Execution
Execution

- Develop a strategic plan, business plan, and *especially* a marketing plan that enables growth in terms of market share and revenue
- Commit capital, develop a budget, and find investors or partners if you need them
- Address staffing, outsourcing, and the need for periodic expertise
- Plan for and implement your technology infrastructure
- Commit to Performance Mgmt
 Execution

- Set the course
- Establish and measure your expectations
- Keep distractions and competing priorities to a minimum
- Hold people (including yourselves) accountable
- Align efforts so time and energy are not wasted
- Provide reinforcements, encouragement and rewards (recognition)
Execution

• Become *Learning Organizations* (there is a lot to learn!)
• Recruit, retain and train the right people in administrative as well as clinical areas
• Innovate and grow from your *Core Competencies*
• Encourage some risk-taking, experimentation and tolerate mistakes
• Conduct market research
• Invest in your brand image and “dress the part”
• Develop scenario-based business modeling and *business case* approaches to innovations
Thank You
Questions and Contact

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