

Census Growth

Developing and Executing a Strategic Marketing Plan

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Developing and Executing a Strategic Marketing Plan

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Health Care Advisory Services, LLC Health Services Management Texas, LLC Luther Woods Nursing and Rehabilitation Center Aven Health Care Center West Hartford Health Care Center Genesis Everyday LIFE Program Presbyterian Senior Living (Pa) Presbyterian LIFE Program Diacon Lutheran Services (PA) Diacon Hospice Liberty Health Care Liberty Home Care Autumn Care Juniper Senior Living Pine Run Village Friendship Village Meridian Health System Home Care Mercy Health System LIFE Program The Hickman	Transcon Builders Geer Senior Living Steuben County Health Care Center Wilmae Corporation Regional Group Adorno Mobility Griswold Special Care (Corporate) Griswold Special Care Wilmington MMG The Anderson Bartley Health Care Ruxton Healthcare Deaconess Long-Term Care Senior Care Centers of America Cornwall Manor Artman Home Rockville Nursing Home Lutheran Services of the Carolinas Studymonkey, Inc.	LW-Consulting Riverside Health System Middlesex County Development Authority Care Center of Honolulu
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Introduction

Luke Fannon

Experience

- 25+ Years of Healthcare Sales and Marketing Experience
- 20+ Years of Increasing Referrals and Leads in Senior Care Industry
- 15+ Years of Senior Leadership Experience
- Started Independent Consulting Firm in 2005



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Results

- \$500 Mil. in Revenue and 70 Communities: AL, SNF, CCRC
 - Numerous Awards – President's and Chairman's Club
- Inc. Magazine's 14th Fastest Growing Privately Held Co.
- Clients and employers alike have experience double and triple digit revenue and profitability growth.
- Our clients include Acute & Sub Acute Rehab, Outpatient Rehab/CORF's, Home Care, Adult Day Health Care, Assisted Living, DME and Pharmaceutical

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Group Discussion

What do you want to get out our time together?



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Program Goal

- Create a Strategic Marketing Plan to Help You Grow Census!


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Program Objectives

- Process of Creating a Strategic Marketing Plan
 - What information do you need
 - Process
 - Identifying the right marketing strategies, tactics and targets based on your market
- Set Realistic Objectives for Referrals and Admissions Based on Census Targets
- ID Successful Strategies and Tactics
- Monitor Plan's Execution and Track Progress

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"If you fail to plan, you are planning to fail."
Benjamin Franklin



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What is a Marketing Plan?

Susan Ward in www.about.com:

"A **marketing plan** outlines the specific actions you intend to carry out to interest potential customers and clients in your product and/or service and persuade them to buy the product and/or services you offer."

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What 'Actions' Should We Chose?

Product	Consumer
Professionals	Media

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Who are your customers?

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Where are your customers?

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Planning to Create a Marketing Plan?

- Metrics from last 2 years (pref)/last quarter (min)
- List of all professional referral sources
- List of all sources of referrals (other than professionals)
- List of previously executed (past year) marketing strategies and tactics
- List of community and other organizations
- List of competitors, strengths & weaknesses
- List of your strengths & weaknesses

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Process

- Analyze metrics and referral trends
- Create Goals and Objectives
- ID competitive position in the market place
- Review previous marketing strategies
- ID Strategies and Tactics
- Create Action Plan

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Process

- Analyze metrics and referral trends

<u>SNE</u>	<u>ALF</u>
Admissions	Move Ins
Discharges	Move Outs
Referrals	Referrals
Conversion Rate = Admissions/Referrals	Move Ins/Referrals
Declines	Tours/Referrals
Lost Leads	Move Ins/Tours
Utilization - LOS	

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Process

- Analyze metrics and referral trends

Metrics are a critical management tool providing leadership the ability to:

- Objectively evaluate sales and marketing team and other team member performance.
- Identify opportunities to improve performance and increase census.
- Make strategic and tactical marketing decisions based on objective information presented.

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Process

- Analyze metrics and referral trends

Admissions/Discharge (Move in/Move Out) Differential

- Admissions > Discharges Census
- Admissions = Discharges Census
- Admissions < Discharges Census

Admissions are a Factor of Two Metrics

- Total Referrals Received x Conversion Ratio

Conversion Ratio

- Admission ÷ Referrals
 - Decline Ratio = Declines/Referral
 - Lost Lead Ratio = Lost Lead/Referral
 - Acceptance Ratio = Admissions/Accepted Referrals

Utilization

- LOS - Length of Stay

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Process

- Analyze metrics and referral trends

Referral Metrics

- Referral Trends are an indicator of the success or failure of marketing plan strategies and tactics. What works & what doesn't!
- Overall
 - Trend of qualified referrals vs. unqualified referrals
 - A high percentage of unqualified leads suggests that you need to improve your communication to referral sources and change your messaging in advertising, public relations and special events.
 - Trend of referral channels: Professionals, Advertising/PR and Special Events - 3 major channels of referrals.
 - Trend of individual referral sources.

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Process

- Analyze metrics and referral trends

Conversion Ratio

- Overall effectiveness your **Process** of Converting Referrals into Admissions
- Indicator of the effectiveness of the **Skills** your admissions sales and marketing teams employ during the process
- Potentially indicator of your **Reputation**
- Potentially an indicator of your ability to **Meet the Needs of Your Customers**

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Process

- Set goals and objectives (SNF)
 - Current Average Daily Census for Previous Quarter
 - Overall
 - Skilled
 - Census Goals (either budgeted or other)
 - Average Admissions/Month Previous Quarter
 - Average Discharges/Month Previous Quarter
 - Conversion Rate/Month Previous Quarter
 - LOS (SNF only)

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Process

- Set goals and objectives (ALF)
 - Current Average Daily Census for Previous Quarter
 - Census Goals (either budgeted or other)
 - Average Move-Ins/Month Previous Quarter
 - Average Move-Outs/Month Previous Quarter
 - Conversion Rate/Month Previous Quarter
 - Tour/Referral Rate Previous Quarter
 - Move-In/Tour Ration

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Process

- Evaluate Competitive Position in Market
 - Physical Plant and Location
 - Programs and Services
 - Reputation
 - Feedback from Referral Sources (on your facility/competitors)
 - Contracts
 - 5-Star Rating
 - Resident Satisfaction
 - Pricing
 - Marketing Tools

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Process

- Evaluate Competitive Position in Market

Qualitative Assessment

- Referral Process: Nursing and admissions and marketing team compared favorably with typical facilities in the market for their efforts on behalf of the case managers and their patients.
- Referral Process: (Client) did not compare favorable to typical facilities they worked with because they are frequently closed Monday through Friday for public holidays (MLK Day, Friday after Thanksgiving and others holidays) when all of their competitors are open.
- Bed availability declines were mentioned as an issue over the Christmas holidays that other competitors did not experience.
- Most competitors are going to 7-day per week admissions processes to meet their needs vs. Client's policy is that weekend admissions must be set up by Friday.
- CO (a competitor) was specifically mentioned as more willing to accept clinically complex patients that client declines.

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Process

- Evaluate Competitive Position in Market

Qualitative Assessment

- Reputation is very good and case managers report few (if any) complaints from patients returning to hospital from facility
- Hospital referral sources report they would like to see client accept fresh trachs and dialysis patients

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Process

➤ Evaluate Competitive Position in Market

Facility	Competitiveness Rating						Overall
	5 Star Overall	Website	Social Media	Brochures	Physical Plant	Location	
Client Facility	4	3	0	2	3	1	2.2
RC	5	4	3	3	5	4	4.0
GL	1	2	4	4	1	3	2.5
SH	4	2	0	3	2	2	2.2
EB	3	4	4	4	3	3	3.5
FB	2	3	1	1	3	1	1.8

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Process

➤ Review Marketing Strategies and Tactics

Referral Sources

- Need Based
 - Quality Care for Patients
 - Customer Service
 - Education
 - Vendor Fairs
 - In-services
 - CEUs
 - Distribution of Collateral Materials
 - New Programs and Services
- Strategic
 - CEO Meeting
 - Department Head Meetings
 - Program Development

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Process

➤ Review Marketing Strategies and Tactics

Referral Sources

- Resource
 - Information and resources even if you don't benefit by receiving a specific referral/admission
- Personal
 - Networking Events
 - Open Houses
 - Thank you for Referrals

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Process

➤ Review Marketing Strategies and Tactics

Referral Source	2 Year Ref. Trend	Education Ops	Strategic Ops
Hospital 1	-5.6%	In-service Distribute Materials	?
Hospital 2	+2.5%	CEUs Vendor Fairs Distribute Materials	?
Dr. 1	Referrals have disappeared	Distribute Materials	Former Medical Director
Dr. 2	10% Increase	Lunch In-services Distribute Materials	Attending
Home Care	+9%	In-service Distribute Materials CEUs	?
Hospice	-3%	?	?
ALF	5%	In-service	Virtual CCRC

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Process

➤ Review Marketing Strategies and Tactics

ID New Referral Sources

➤ Client Honolulu, HI

5 Referring Hospitals	1 Admit/Year from Group Homes
7 Hospitals No Relationships	13 Group Homes in Honolulu
5 admits/mo. from "home"	16 ALF's
Where do they come from? No Idea!	No Relationship
17 Home Care Agencies	19 PCP's
1 Specializes in Respiratory Programs	No Relationships

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Process

➤ Review Marketing Strategies and Tactics

Media

- Print, Radio, TV, Direct Mail
- Organization Support
- Public Relations
- Website
- Facebook and other social Media

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Process

➤ Review Marketing Strategies and Tactics

Media Tactic	Deployed	Message	Referrals/Mo
Website	Yes		2
Facebook	Yes		0
Radio	Yes	Memory Care, Regular ALF, Nutrition, Medications	3
Print	Yes	Memory Care, Regular ALF, Nutrition, Medications	2
PR	No		

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Process

➤ Review Marketing Strategies and Tactics

Consumer

- On-Site Special Events
- Off-Site Special Events
- Health Fairs
- Charitable Efforts
- Professional Organizations Participation

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Process

➤ Review Marketing Strategies and Tactics

Event	Attendance	Referrals	Secondary Impact
VA Event @ Facility	300	2	Article in Paper 16 VA Residents
Pictures with Santa	35	0	Put on Facebook
BP Screen @ Sr. Ctr	50	2	Sr. Center Newsletter Referrals from KWH
Health Fairs	N/A		

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What 'Actions' Should We Chose?

Product	Consumer
Professionals	Media

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What 'Actions' Should We Chose?

Product > Improve Services > Add Services > Improve Admissions Processes > Pricing & Managed Care Contracts > Criteria for Admission	Community > On-Site Special Events > Off-Site Special Events > Health Fairs > Charitable Efforts > Organization Participation
Professionals > Expand Existing Referral Sources > Develop New Referral Sources > Education > Customer Service > Strategic Relationships > ACO & Bundled Payment Program Participation	Media > Website > Social Media > Advertising > Public Relations

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What 'Actions' Should We Chose?

Product/Improve Services > Quality of Care (Best for Patients) > 5-Star Rating, Resident Satisfaction > Cleanliness, Landscaping > Paint and Interior Decorations > Renovations	Product/Add Services > Vent Units > Memory Care Neighborhoods > Outpatient Rehabilitation > Advanced Respiratory Program > Partnerships with Hospitals & Other Providers > Palliative Care Program
Product/Improve Processes > Improve TAT > Improve Criteria for Admission > Reduce Information Requested > Improve Communication > Reduced Room Readiness TAT > Improve Medical Paperwork Processes > Change Application Processes	Product/Pricing & Managed Care Contracts > Add managed care contracts > Adjust Pricing > Care Level and Medication Administration Pricing Adjustments > Incentives

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What 'Actions' Should We Chose?

Consumer/Need Based Events On-Site > VA Programs > Parkinson's > Alzheimer's Virtual Reality > Orthopedic > Cardiology	Consumer/Need Based Events Off-Site > Health Screenings > Health Fairs
Consumer/Soft Events On-Site > Pictures with Santa > Holiday Events > Family Dinner > Lunch on Us > Veterans Day Event > Charity Events	Consumer/Soft Events Off-Site > Bingo @ Sr. Center > Charity Events > Chamber, Rotary

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What 'Actions' Should We Chose?

360° Relationship

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What 'Actions' Should We Chose?

Professional/Need Based > Quality Care for Patients > Customer Service TAT, Communication > Overcome Challenges > Education > Continuing Education (CEU)	Professional/Resource > Assistance with challenges when you do not benefit > Articles of Professional Interest > Invitations to Networking Events
Professional/Strategic > Medical Directorship/Attending Relationship > Meeting an Extraordinary Need/Program Development or Service Enhancement > Develop New Business > Joint Ventures > Strategic Partnership > Co-Branded Products Development > ACO & Bundled Payment Participation > Post-Acute Network Participation	Professional/Personal > Thank You's (\$300 Annually) > Networking Events > Open Houses > Happy Hours > Charity Events > Coffee on the Go > Dinner on the Go

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What 'Actions' Should We Chose?

<p>Media/Traditional</p> <ul style="list-style-type: none"> ➤ Paid Source of Information for Consumers About Your Product ➤ Print ➤ Radio ➤ TV ➤ Direct Mail ➤ Support Special Events 	<p>Media/PR</p> <ul style="list-style-type: none"> ➤ Free Source of Information for Consumers About Your Product ➤ Support Special Events ➤ Support Charitable Efforts ➤ Pictures
<p>Media/Website & Social Media</p> <ul style="list-style-type: none"> ➤ On-line Source of Information for Consumers About Your Product ➤ Develop Website ➤ Create Content and Video for Website ➤ Blog Monthly (website and Facebook) ➤ Encourage On-Line Reviews ➤ Respond to Negative Reviews ➤ Update Monthly ➤ Create Facebook Page ➤ Update Regularly 	<p>Media/Marketing Tools</p> <ul style="list-style-type: none"> ➤ Main Brochures ➤ Brochures for Specialty Programs (Memory Care) ➤ Insurance Card List ➤ Physician List ➤ Room Layouts ➤ Pricing Sheets

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Process

- Analyze metrics and referral trends
- Create Goals and Objectives
- ID competitive position in the market place
- Review previous marketing strategies
- ID Strategies and Tactics
- Create Action Plan

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Format of Strategic Marketing Plan

- Goal
- Objectives
- Strategies
- Tactics

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Marketing Plan Elements

- **Goal:** It's a number! A Measurable and specific milestone that defines ultimate top line success.
- **Objectives:** NUMBERS! Measurable and specific milestones that when met should get you to your goal/s. 3 to 5 Objectives in a plan!
- **Strategies:** Broad statements of activity that articulate the approach your organization will take to achieve its objectives.
- **Tactics:** Specific actions that when completed will result in you realizing your strategies and achieving your objectives:
 - Time Frame for Completion
 - Someone responsible for completing it (NOT THE TEAM)

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Strategies/SNF Case Study

1. Increase Referrals from Existing Hospital Referral Sources through Education About RCC's Competitive Advantages.
2. Increase Referrals from Existing Hospital Referrals Sources through Participation in Accountable Care Organizations and Bundled Payment Programs
3. Increase Referrals from Existing Hospital Referrals Sources through Improvement in Admissions Processes and Criteria for Admissions
4. Develop Assisted Living, Adult Day Health Care, Home Health and Hospice Referral Sources
5. Develop and Implement Advertising Campaign
6. Develop and Implement Internet Strategy
7. Develop and Implement Public Relations Campaign
8. Develop and Implement Special Event Campaign
9. Train and Coach Team to Maximize Effectiveness

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Strategies/ALF Case Study

1. Develop Hospital, SNF, Home Care, Hospice and PCP referral sources.
2. Develop and Implement Advertising Campaign
3. Develop and Implement Internet Strategy
4. Develop and Implement Public Relations Campaign
5. Develop and Implement Special Event Campaign
6. Train and Coach Director of Community Relations and ED to Maximize Effectiveness

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Strategies/Memory Care (NP) Case Study

1. Develop marketing support tools
2. Educate existing referral sources about new program
3. Develop new referral sources in the behavioral/psych market
4. Develop new referral sources in the snf, alf, home care market
5. Develop community based tactics to promote new program
6. Train and Coach Marketing Director and Administrator to Maximize Effectiveness

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Tactics/SNF Case Study

Increase Referrals from Existing Hospital Referrals Sources through Education about RCC's Competitive Advantage

- A. Participate in Vendor Fairs in Appropriate Hospitals
- B. Schedule In-Services at Appropriate Hospitals
- C. Distribute New Collateral Materials to Case Manager
- D. Schedule In-Services with Hospitalists Groups
- E. Host VIP Open House

Increase Referrals from Existing Hospital Referrals Sources through Participation in Accountable Care Organizations and Bundled Payment Programs

- A. Meet with Senior Leadership to Discuss ACO Participation
- B. Coordinate Monthly/Quarterly Participation in Post-Acute Network Participation
- C. Coordinate Monthly/Quarterly Meetings at Facilities with ACO Team
- D. Provide requested metrics for ACO Participation
- E. Identify and Make Appropriate Services Changes to Meet ACO Requirements

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Tactics/SNF Case Study

Increase Referrals from Existing Hospital Referrals Sources through Improvement in Admissions Processes and Criteria for Admissions

- A. Begin 7-day per week admissions
- B. Expand criteria of admissions to reduce declines
- C. Expand external case managers decision making capabilities to improve TAT
- D. Create and distribute collateral materials to case managers with new criteria for admission and insurance contracts
- E. Credential case managers in all hospitals

Develop Assisted Living, Adult Day Health Care, Home Health and Hospice Referral Sources

- A. Create list of targets
- B. Schedule in-services with Executive Director, DON and other team members in targets
- C. Create networking events hosted at facilities

Develop and Implement Advertising Campaign

- A. Obtain pricing for various print and radio
- B. Create and Place Ads

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Tactics/SNF Case Study

Develop and Implement Internet Strategy

- A. Update website
- B. Create Facebook Page
- C. Update minimally monthly

Develop and Implement Public Relations Campaign

- A. Create topics for press releases and advertorials
- B. Create and implement placement schedule

Develop and Implement Special Event Campaign

- A. Cardiology Education Event for Professionals
- B. Educational Event @ Local Senior Centers
- C. Networking Events Hosted at Facility
- D. School Children Event @ Facility
- E. Summer Concert Program @ Facility
- F. Community Fall Festival Participation

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Tactics/Structure

Tactic:	Thanksgiving Event @ Facilities
Responsible Person:	Activities and Marketing Team
Completion Date:	November
Cost:	2016: \$200 to \$400 2017: \$200 to \$400 2018: \$200 to \$400

Tactic:	Meet with Senior Leadership at RWJUH
Responsible Person:	Administrators
Completion Date:	June 30, 2016
Cost:	2016: \$0

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Tactics/Memory Care (NP) Case Study

Develop marketing support tools

Action Items:	Responsible P.	TDC
A. Create brochure	Luke/Karen/BP	4/1/2015
B. Update website	Luke/Karen/Taylor	4/1/2015
C. Create Postcards Direct Mail	Luke	3/15/2015
D. Create Ads for Placement in Newspaper	Luke	3/15/2015
E. Place Ads	Taylor	As appropriate
F. Send out Direct Mail Piece	Terri/Taylor	As appropriate
G. Uniforms	Karen	4/1/2015

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Tactics/Memory Care (NP) Case Study

Educating existing referral sources about new program

Targets: Kingwood, Conroe, Livingston, Solara, ICON, Healthsouth, Methodist, St. Luke's Woodlands, Memorial Hermann (Humble, KW, WL), VA, Home Care and Hospices

Action Items:	Responsible P.	TDC
A. Distribute brochure to all case mgt/sw dept.	Terri	4/1/2015
B. In-service all targets that will schedule one.	Terri/Karen	4/30/2015
C. Educate case managers during follow up on Referrals and hospitalized residents	Terri	Ongoing
D. CEU programs for all case mgt/sw dept. That will schedule it	Terri	Ongoing

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Tactics/Memory Care (NP) Case Study

Develop new referral sources in the behavioral/psych market

Targets: See attached lists

Action Items:	Responsible P.	TDC
A. Distribute brochure to all case mgt/sw dept.	Terri	4/1/2015
B. In-service all targets that will schedule one.	Terri/Karen	4/30/2015
C. CEU programs for all case mgt/sw dept.	Terri	5/30/2015

Develop new referral sources in the snf, alf, home care market

A. Distribute brochure to all case mgt/sw dept.	Terri	4/1/2015
B. In-service all targets that will schedule one.	Terri/Karen	4/30/2015

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Tactics/Memory Care (NP) Case Study

Develop community based tactics to promote new program

Action Items:	Responsible P.	TDC
A. Open House	Terri/Karen/team	5/15/2015
B. Educational Programs at Senior Center	Terri/Karen	4/1/2015
C. Educational Programs at Senior High Rise	Terri	4/1/2015
D. Press Release	Luke	4/1/2015
E. Educational event with Dr. Brams at CHCC	Terri/Karen	5/30/2015
F. Create ads to support above	Luke	As needed

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Marketing Plan Format

- Marketing Plans created to be executed in a quarter (3 months)
- Excel Spread Sheet for Goals & Objectives
- Tactics are organized by strategy and include the following:
 - Action item to be completed
 - RP: Responsible Person who will complete the action item
 - TDC: Targeted Date of Completion for the action item
 - ADC: Actual Date of Completion when action item is completed
 - Notes: Information the team needs to know about the completion of an action item.
- To complete the marketing plan a meeting should be held with the appropriate sales and marketing & operations/clinical team members to create the plan
- Create plan with input and buy in from all team members

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Marketing Plan Creation Format

- Marketing Plans created to be executed in a quarter (3 months)
- Excel Spread Sheet for Goals & Objectives
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- Create plan with input and buy in from all team members

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Marketing Plan Execution & Accountability — **Best Practices**

Quarterly	Create the Plan
Weekly	Schedule Action Items & Review
Monthly	Review Plan

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Marketing Plan Execution & Accountability **Best Practices**

- Schedule & Review marketing plan tactics weekly to ensure they are being completed - 30 minute meeting
- Input date completed in ADC column and insert notes in note column (we call these accountability columns)
- End of the 1st & 2nd months of plan have formal marketing plan review meeting with entire team (1 hour meeting). Review:
 - Results from marketing plan execution
 - Metrics (census, admissions, referrals, conversion rates etc.) and compare to goals and objectives
 - Eliminate what doesn't appear to work (or adjust execution to see if you get better results)
 - Add more tactics of what does work
- End of 3rd month create new plan and celebrate your success

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Conclusions

- A Marketing Plan is an outline which describes how your organization is going to meet its census goals
- A good marketing plan has the following 4 elements:
 - Goal: One specific & measurable number which defines top line success
 - Objectives: 3 to 5 specific & measurable numbers which when achieved will enable your organization to reach its goal
 - Strategies: Broad statements which define how your organization will achieve its objectives
 - Tactics/Action Steps: Specific actions, accomplished in a specific time frame by a designated team member
 - It is organized to be achieved in quarterly (3 month) stages

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Contact Information

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Call for a free consultation or if you want to ask me any questions!
 Our services include: Sales and marketing training, coaching, strategic marketing plan development, strategic consulting services
 All of our programs are approved by NAB for LNHA and CALA Administrator CEUs.
