

Do You Really Know Where Your Occupational Health Program Stands?: A Primer to Building a Market Assessment Plan

by Carolyn Merriman

Does any of this sound familiar?

“We know what they need. We’re the clinicians . . .”

“Occupational health isn’t critical to our bottom line . . .”

“Nothing’s changed in our marketplace for years, so we don’t need to spend the money.”

It’s not enough to assume that you know what’s best for your customers—or that if you supply it, they will come. Today, more than ever, we have to be carefully tuned in what makes our customers tick.

Part I: Learning About Your Customer

One of the best investments an organization can make is to really understand its customers—to know their wants, needs and desires and to see how they ideally would like to have a relationship with a health system.

Despite what some say, there’s no right or wrong way to acquire this information. The methods and approaches you choose should be customized to fit your market, your type of customer and your organization’s current perception in the marketplace.

Here are some key areas for consideration as you build a market assessment mechanism that works for your organization:

- Employer Telephone Surveys
- Focus Groups
- Individual Meetings/Interviews with Customers
- Talk with others who serve/partner with Employers
 - Payers and TPAs
 - Physicians
 - Key ancillary hospitals and/or services, if applicable
 - Associations
- Competitive Analysis
 - “Know thy enemy or potential partner.”
 - Don’t assume you know who and what is your competitor—always learn and keep this information current!

- ❑ **Use the Strength, Weakness, Opportunity and Threat (SWOT) analysis.** Take an objective look at your organization, products, services, and ability to deliver and meet the employer's needs.
- ❑ **Mystery shop.** Set up scenarios to “test” the organization in its responses. Ask someone to pose as a patient for worker's compensation at your clinic and/or emergency department. Or have a person call in for information about scheduling 10 pre-employment physicals . . .
- ❑ **Hold input meetings.** Gather key service and product leaders to review their offerings. Focus in on staffing, capacity, program capabilities, pricing, access and their current understanding of their customer base. In essence, conduct a SWOT analysis with each business unit leader.
- ❑ **Do a gap analysis** of your organization and your competition. What isn't being offered that should be that would benefit all parties?
- ❑ **Develop customer queries.** Sales staff can take these key questions to clients during update interviews.
- ❑ **Define your marketing.** Where can you differentiate yourself in the marketplace? What niche you can claim?
- ❑ **Review and assess your structure.** Review the staffing mix, roles/responsibilities, staff training and development needs and the infrastructure to support these efforts.
- ❑ **Establish a new opportunities assessment.** Is there a way to capture market intelligence that presents new business opportunities internally, gains administrative support and then utilizes a business development process for implementation?

If it's difficult to be objective about your own organization, it may be time to seek an outside party to work as your partner in market research, assessment and redefining your customer strategy.

Part III: Learning That the Proof is in the Pudding

Follow-through after the learning process is crucial. Here, you need to use what you've captured to improve product, capacity, marketing tactics and ultimately the relationships with your customers. There's nothing quite as damaging to your credibility as asking customers, internal and external, for their opinion and input—and then doing nothing with that information.

Here are some ideas for moving the process along as you continue to enhance your customer relationships:

Internally:

- 1) Pull the information you've captured into a high-level plan. Back it up with the quantifiable data from the market research and put forth a business case and action plan for approval and implementation.
- 2) Seek and obtain administrative support and commitment to the changes. Develop a means for tracking and measuring the changes made and the results. Keep the group informed of successes and ongoing program results.

- 3) Have your sales team develop a tactical territorial sales plan to encompass the new product/program enhancements and the desired results for your organization.
- 4) Develop approaches and messages to communicate all of your enhancements. Train all staff involved in the customer experience these messages and their role in customer acquisition, retention and growth.

Externally:

- 1) Develop marketing communication plans for external customers. Don't assume customers know about your improvements. Remember the rule of communications—repeat all messages at least seven times.
- 2) For your loyal customers, take the improvements to them ASAP. Provide an opportunity to be a “beta site” for the new program. Mention that you listened, learned and have built enhancements as a response to their valued input, and that by partnering you've been able to build programs that benefit everyone.
- 3) Monitor and measure the results of your changes. Don't wait a year or two; keep a pulse on a quarterly basis, so if a change is required it can happen sooner rather than later.

Part IV: The Big Lesson (or What's the Payoff?)

There are few unexplored opportunities in our markets, challenging us to work harder to acquire, retain and grow revenues and referral volumes into our programs. Our customers are bombarded with messages in all forms and have increased challenges in their worlds – competition, the economy, and increases in healthcare costs for their employees.

Our customers are also living in two levels of expectations for their healthcare services. One, basic core services need to be delivered well. And, two, with increased sophistication and knowledge levels about healthcare services, employers are expecting us to anticipate and provide programs that exceed expectations.

So, what's in it for you and your organization to take on this extra assessment? You can't afford not to—your competition is seeking the same market niche you are and in some cases is planning to “cherry pick” your profitable services. As we've all experienced in these past few years, we can't afford complacency or assume we own the market. Doing a research and assessment plan is an investment in short- and long-term differential advantages, ones that can deliver measurable results to your bottom line.



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