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MARKETING SAVVY:

How Retention Efforts Can Measure Satisfaction, Manage Issues, and Help Grow Your Business

This article appeared in Tracker, Autumn 2007

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A comprehensive sales strategy for occupational health facilities requires a focus on three critical channels: • new business or growth,

- retention, and
- service/issue management.

In all likelihood, your leadership team has identified new business development as the focus for your sales and marketing effort. Prospective businesses are in the lineup with direct sales strategies in place. But what about your current clients?

Never underestimate the need to keep the clients you can't afford to lose. You must stay ahead of the curve on their issues or concerns, and — most importantly — seek opportunities to grow business with the people who already like doing business with you. In this article, we'll focus on the customers you've already sold, providing tips and techniques for ensuring satisfaction and managing service.

Create an Effective Retention Plan

The names of the clients who make your business successful should always be in the forefront of your mind, and the minds of everyone on our team. You should have a 90-day plan that targets the top accounts and tactically identifies how you plan to meet, work, and communicate with these clients during that quarter.

The plan should review the current client status: services they contract for and workers' compensation utilization trends. This client review and internal discussion should lead to several valuable outcomes:

- a short-term strategy for a client account management meeting;
- a list of areas for review with the client, such as discussion of return on investment for services you've delivered and areas for improvement (on either side); and
- your recommendations for the next quarter coupled with an annual program design.

This plan will then drive your work in pre-call planning, a data and trend review, and development of a client report and recommendations to retain and potentially grow the client's business with your program.

Get Input from Current Clients

Plan to conduct regular account management meetings with valued clients. The purpose of the meeting is to review their current utilization, identify areas for improvement, education, and/or additional service options. Prepare a customer report (using your occupational health software) that reviews their company's data and, if possible, aligns it with national or industry benchmarks.

Pre-plan your key discussion points in terms of the accomplishments you've achieved for them, using benchmarks such as cost savings, changes in protocols or decreases in utilization or lost work days. Examples of data that you might review include:

- types of workers' compensation injuries and treatment lengths/cost;
- services they used that were not pre-planned or contracted;
- emergency room visits or out-of-system/network visits;
- employer and patient/employee satisfaction results or concerns;
- seasonal requirements such as hepatitis and flu shots;
- return to work statistics;
- if you make referrals, review the process, timing, number of visits, your case management and interaction with these other services/providers; and
- if you are providing corporate health or wellness programs, include health risk appraisal data or educational participation.

Proactively Manage Issues

Nobody's perfect, and mistakes do happen. In "Strengthen Your Sales Efforts through Effective Issue Resolution" (an *Occupational Health Tracker* article available at http://www.systoc.com/Tracker/Summer07/IssueRes. pdf), we discussed how it's critical to have a formal process to track, report, and respond to issues and complaints. This gives you an opportunity to prioritize and focus resources on the areas requiring improvement.

Take the Meeting to the Next Level

Part of the job is to seek out opportunities and identify possible issues/concerns before they arise. Customers may not be able to articulate that they want to buy executive physicals or onsite screenings, but they'll be able to identify a business goal or concern, or an issue about your service. Translate that concern into how your service resolves or addresses it.

Meet issues and concerns head on. Review the account documentation and your database and interview the key staff at your clinic to get information about the client, their utilization, and potential issues that arose during the previous quarter. Do your pre-call planning and homework and you'll be prepared—not sandbagged. Ask yourself questions such as these:

1. Have you seen an increase in lower back injuries in a specific job/duty?
2. Have you seen a shift in volumes? (Could that indicate they're using another provider on second shift?)
3. What caused a recent series of mix-ups with the drug screens? By reviewing the cases, documentation, and improvements made to correct this you'll be prepared to discuss the issue productively with the client.

Prepare questions for the client to help you understand how this client measures success, their satisfaction, and where they seek improvement.

1. "When you evaluate us as a partner, what one or two things are on the top of your list as measurements?" "How would you say we're doing on this?" "Are there areas of improvement or is there one thing we could focus on to improve?"
2. "As you look at working with any provider or vendor, what one thing is most important to you?"

3. "You indicated you'd like better communication. Could you tell me what that would look like and how it would work?"

Finally, prepare questions that help you expand your operations with the client.

1. "Are there others at your company with whom we should be working or sharing information? If so, who are they and how would you like us to work with them?"
2. "While I know we're currently providing you limited services, many of our other clients have expanded our program to a partnership level. This allows us to be their gatekeeper and resource for all healthcare issues and makes us available as an ongoing consultant to support health, wellness, and benefit and payer decisions. Would this be of interest to you?"

Grow the Business with Loyal Customers

The worst kind of loss is customers who go elsewhere because they didn't know what you had to offer. Remember, it's easier to sell an existing account a new or upgraded service than to obtain a new customer who isn't familiar with any of your offerings. Work with your operations and product team members to develop systems for responding to complaints and market opportunities. This allows you to be a seamless customer team and approach customers proactively in terms of service and future product sales.

Another sales tool is developing a customer needs assessment that allows for questions in key areas, such as satisfaction, issues, communication and new needs. You don't ask these questions every time you meet, but you use them as a guideline to optimize those targeted growth/retention customer dialogues.

Many clients are able to articulate their strategies, goals, and concerns. It's your job to match their needs with what you have to offer. Integrating the customer management and communication systems described in this article ensures that you'll keep the business you have and strategically grow to stay ahead of the competition. ■ ■ ■

Tips for Growing Current Business

1. Review your list of current customers and match them with areas in which you desire volume growth.
2. Select a sales and marketing approach, message, and offerings that will help you add value to the current relationship.
3. Design a customer report/review and integrate the proposed "partnership" or new business options into your recommendations. Your proposal should reflect their politics, buying relationship, and budget sensitivities so your options appear workable and implementable.
4. Present your proposed options in phases or in order of greatest impact on their goals.
5. Agree upon an ongoing communication, implementation, and review process to grow the partnership with you as their trusted resource.

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