

# Marketing Your Organization

## *First Steps for Providers*

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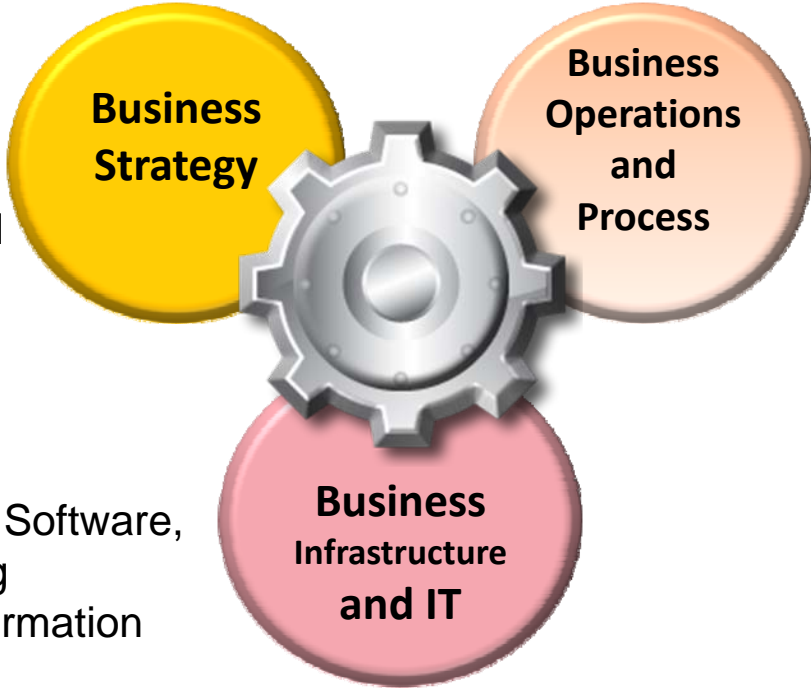
# Objectives

- *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
    - Hardware, Software, Networking
    - Health Information Exchange
    - Information Mgmt
    - Data Analysis & Metrics
    - Communications infrastructure
- Management
  - Staffing
  - Workflow and Business Process
  - Managed Care Functions
  - Billing and Revenue Mgmt
  - Integration

# Paradigm Shift Hits the Fan!

Meaningful Use

Reform

Medicaid Expansion

ONC Certified EHR

Parity

Health Insurance Exchange

Block Grant

Recession/Budgets

HIPAA 5010

PCMH

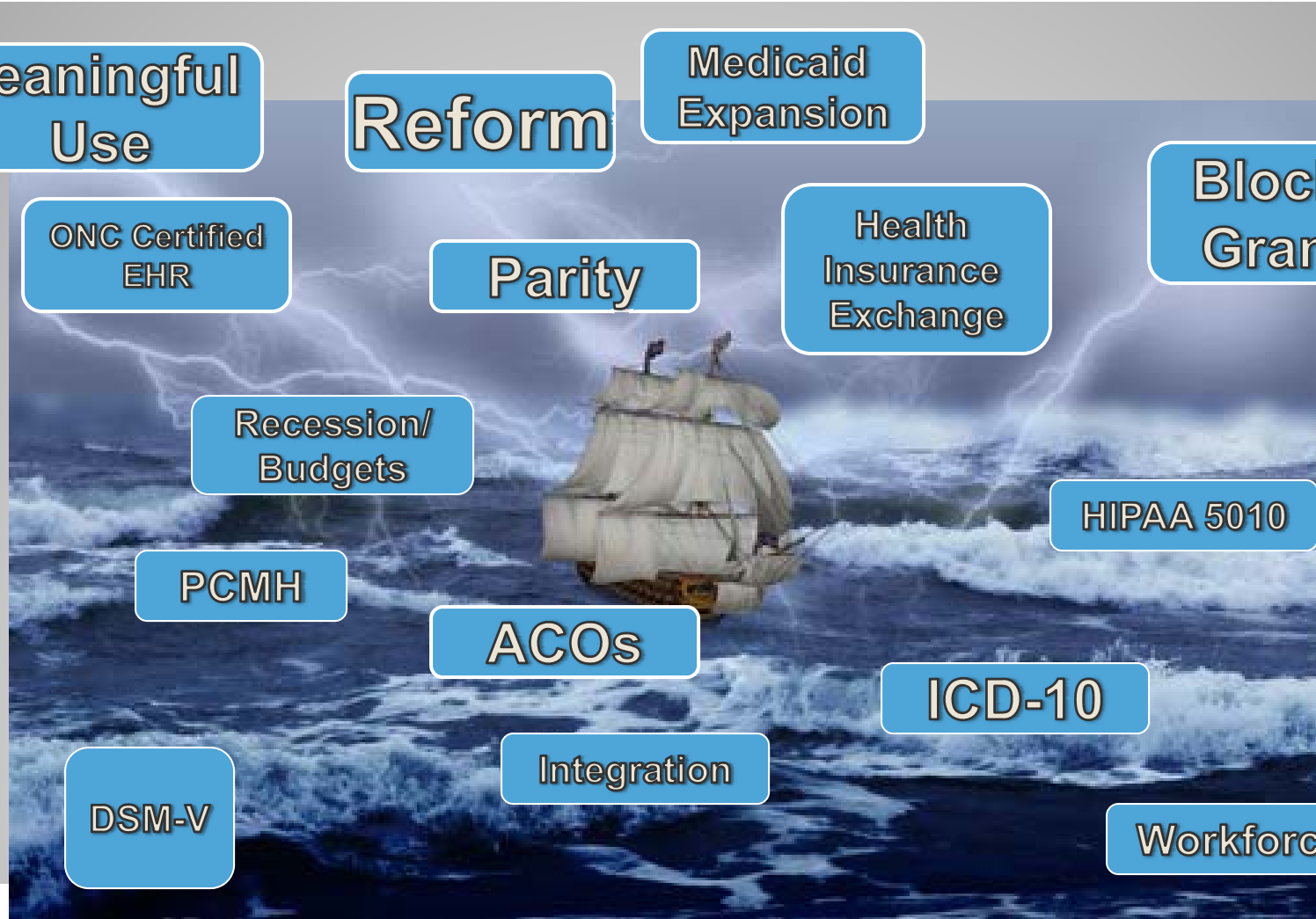
ACOs

ICD-10

DSM-V

Integration

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.**



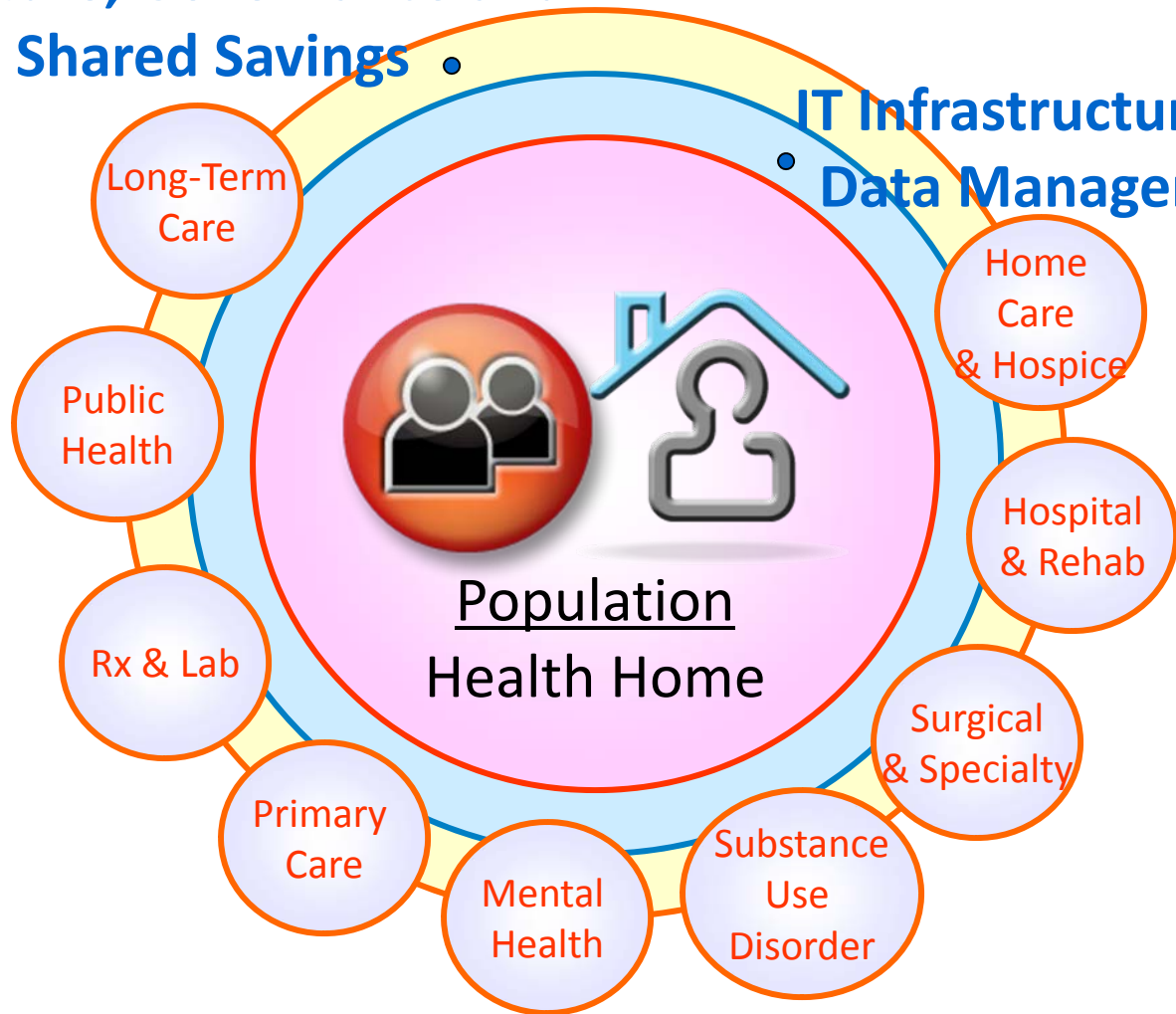
## Reforms

- **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





# Then & Now

**Private Insurance**

**Publicly-Funded Treatment**

DOI

Employers

Brokers

Insurance

Managed Care

Networks

10%  
-25%

Health Insurance Exchanges

Medicaid Managed Care Plans

75%  
-  
90%

32+ Million Uninsured

Federal Agencies

State Agencies

Counties and Cities

Corrections & Courts

Prevention

Housing & Jobs

Managed Care

Networks

Standards & Science



# 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

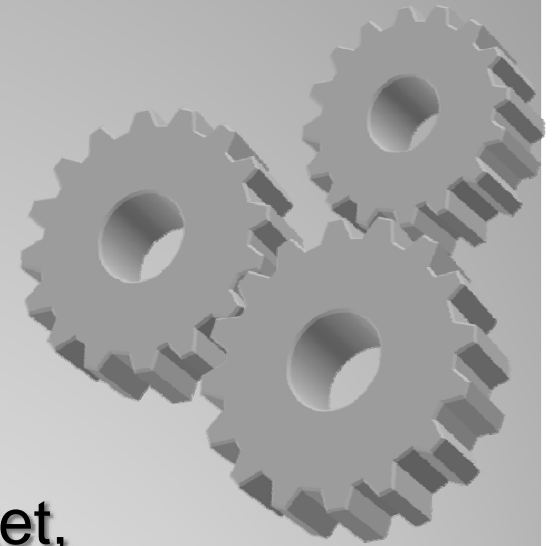
# What to Expect

- 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!**

Internal Structure, Practices,  
Processes and Performance



External Environment, Market,  
Partnerships, and Alliances

# Step One: Assess

- 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

# Internal Assessment

- Clinical Programs/Staff
- Quality Assurance
- Customer Service
- Managed Care/Care Mgmt
- Facilities and Infrastructure
- Information Technology and Telecomm
- Clinical Records and Documentation

# Internal Assessment

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

Financing the technology  
transformation

Clarifying scope of service questions

Federal vs. State Laws and  
Regulations

***Assess Environment***

- 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)

# Assess Commercial Market



# Market Research

## Sources of Valuable Information

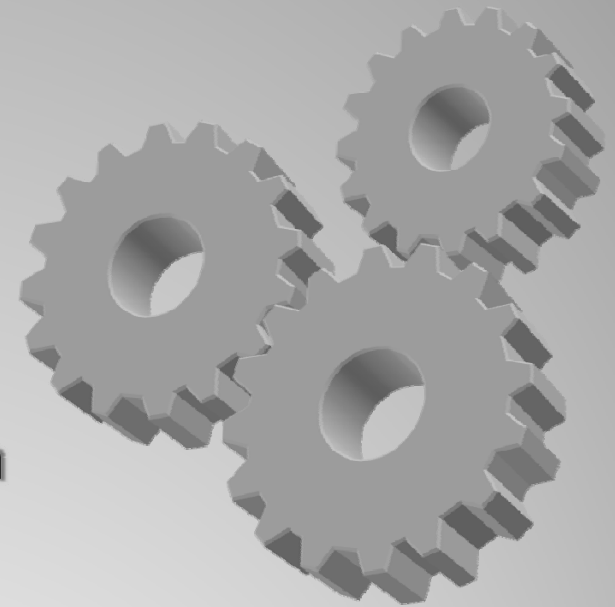
- **Health Plans and Managed Care Organizations**
  - State Department of Insurance
  - AHIP and State Associations of Health Insurance Plans
- **Self-Insured Employers**
  - National and Regional Business Group on Health
  - Employers' Health Coalitions
- **Federal and State Agencies**
  - HRSA, SAMHSA, NIDA, DOL, CMS, DOJ web sites

- Market Profile
- Payer Profile



**Review Tools**

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



# Step Two: Planning

# 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?



- ❑ 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

# 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

- 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

# Market Segmentation



- ✓ 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

## 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

Market Segments/ Services	Segment 1	Segment 2	Segment 3
Service 1			
Service 2			
Service 3			

# Market Opportunity Matrix

# 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

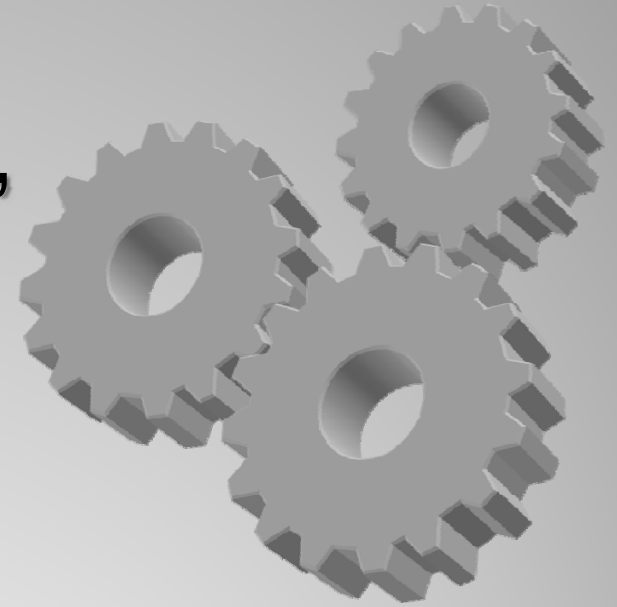
- Professional
- Face-to-face
- Expressing willingness and interest
- Demonstrating *big picture* understanding and prospect of synergies
- Eager to develop viable, marketable, attractive solutions
- Promoting new services and potential new business model
- Clear, distinct, customer value proposition
- Potential collaborator? Investor? Partner? Buyer?
- 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

- 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

# 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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