# The physician outreach playbook: Part 2

Step-by-step instructions to simplify your outreach efforts and maximize your time

Optum

# Use this playbook to maximize the impact of your outreach visits

This document is designed to give you tactical steps to enhance and simplify your physician outreach efforts. In The Physician Outreach Playbook: Part 1, we designed a structured process for outreach teams to use as a foundation for success. This playbook provides step-by-step instructions for optimizing your outreach efforts.

We'll walk through how to fill out several worksheets (blank versions available in the appendix) that will help ground your strategy, craft your message and make your day-to-day outreach simpler and more effective.

## Step 1.

# Look at all aspects of the physician relationship

Once you have a list of physician targets, you'll need to devise a customized outreach strategy for each physician visit. By customizing your strategy to focus on how your organization can directly meet a physician's pressing needs, you'll increase the likelihood of inflecting change in their behavior.

During this step, refer to page 11 in the appendix to follow along with the **Physician Relationship Worksheet**. If you have an upcoming visit to schedule with a physician, use them as a first example.

### Step 1a: Look at historic physician relationships to ground your ideas

Referring to the Physician Relationship Worksheet, write down some of the top PCP relationships with your organization. Think back to what works well with those relationships. Fill in these details in **Section 1** of your worksheet.

| Section 1 | Historic physician relationships | |
|---|---|---|
| | Top five PCP relationships | Names: |
| | Total count of PCP relationships | Number: |
| | Recent intelligence on preferences, issues and complaints | Notes: |

## Step 1b: Understand the physician relationship

Next, identify some of the trending information and characteristics about a particular physician you will soon visit. Fill this information out in **Section 2** of your worksheet.

| Section 2 | Physician performance patterns | | | |
|---|---|---|---|---|
| | Attending volumes in service line or sub-service line across past year | Growing | Steady | Declining |
| | Splitter assessment – total leakage and services by competitor | High | Average | Low |
| | Geographic assessment – ZIP code count for past year vs. specialty comparison group | High | Average | Low |
| | **Financial and patient characteristics** | | | |
| | Contribution margin per case across past year vs. specialty comparison group | High | Average | Low |

### Strengthen your standing as a trusted business partner

We recommend grounding this view in data found in Optum® Market Advantage. This will help you validate your predictions and ultimately save time.

Not a current Optum analytics client? Learn more about the types of data assets available here.

## Step 1c: Categorize the physician's relationship with your organization

Using your knowledge of the organization, along with any organizational data you may have, classify the physician you're reaching out to by the splitter categories below. This classification will be used to customize your approach to the visit.

| Splitter type | Your outreach strategy |
|---|---|
| **Loyal splitter**<br>Refers over 50% of patients to your organization | Focus on improving the relationship, making the physician feel like a partner. Educate them on other service offerings. |
| **Competitor preference splitter**<br>Refers over 50% of patients to a competitor | Initiate a sales-based conversation. Understand the physician's needs and explain your organization's offerings. |
| **Product splitter**<br>Splits on a particular sub-service line or refers subset of patients to a competitor | Understand the reason for sub-service line leakage. Focus on improving the relationship and educate on service offerings. |
| **OP ancillary splitter**<br>Refers OP ancillary patients to a competitor | Include specific service line leadership in visit and remove any barriers to growth. |

Once you have determined the physician's splitter type in the first column, record this in **Section 3** of your worksheet along with the recommended outreach strategy. An example is listed below.

| Section 3 | Physician splitter type | |
|---|---|---|
| | **Splitter type:** Product splitter | **Outreach recommendations:** Understand the reason for sub-service line leakage, focus on improving the relationship and educate on service offerings. |

## Step 1d: Understand the physician's personality type

Lastly, take into account personality type. Gather information on the physician's personality traits based on field intelligence and any past visits. Review the personality types below to determine how to best tailor your visit.

| Personality type | Your outreach strategy |
|---|---|
| **Amiable**<br>• Friendly<br>• Emotionally driven, people-oriented<br>• Often afraid to say no | **Emphasize the benefit;** do not rush decision but create natural urgency |
| **Analytical**<br>• Unemotional<br>• Wary of heavy sales approach<br>• Requires facts and details | **Prepare well;** be precise and factual without overstating the benefits |
| **Expressive**<br>• Emotional and assertive<br>• Gregarious and naturally likable<br>• Finds details boring | **Stress the "new;"** provide lots of attention and keep regular touch |
| **Driver**<br>• Unemotional and assertive<br>• Focuses on time, action and results<br>• Makes quick assessments | **Be efficient in conversation;** prepare well to avoid a quick "no" |

Once you have determined the physician's personality type in the first column, record this in **Section 4** of your worksheet along with the recommended outreach strategy. An example is listed below.

| Section 4 | Physician personality type | |
|---|---|---|
| | **Personality type:** Driver | **Outreach recommendations:** Be efficient in conversation; prepare well to avoid a quick "no" |

## Step 2.

# Define your product offering

In addition to customizing your strategy based on physician personality and current relationship with your organization, design your outreach strategy around the physician's preference for your services. To accomplish this, you should approach the visit with the physician's needs in mind — addressing "what's in it for them." Be prepared to describe the benefits the physician will garner from your service rather than simply listing the features of that service.

### Self-guided exercise

Work with service line leadership to collect the information needed for the **Product Definition Worksheet**, found on page 12 in the appendix. Use this information to help you anticipate common questions about the product and prepare scripted answers. You can also reference previous physician requests and logged issues to understand trends and diagnose areas where there is opportunity to build a case for future investment.

### Time-saving tip

Save the Product Definition Worksheet in an easy-to-access place so you can refer to it in the future. While it will need to be updated on occasion to reflect new product offerings and differentiators, it will not need to be updated every time you schedule a physician visit.

## Step 3.

# Develop the right message

After devising an outreach strategy that represents what you know about the physician and the product that best addresses his or her anticipated needs, use your strategy to inform the message you will convey in the visit. Before developing your script, review the following best practice recommendations:

- Focus your scripting on the physician's anticipated needs and how the service your organization offers meets those needs
- Be prepared to participate in dialogue — answer physician questions with statistics and collateral whenever possible
- Review your team's policy for managing complaint resolution in case the physician brings up an unresolved issue

During this step, refer to page 13 in the appendix to follow along with the **Scripting Template Worksheet.**

### Step 3a: Pre-visit tasks

Before developing your script, be sure to let the physician know what to expect so both of you can make the most of your time. To do this, reach out to the physician indicating the date and time of the visit, time allotted for the visit, a brief agenda of what you'll cover, and an overview of the value proposition you wish to discuss.

Once you have determined these details, record this in **Section 1** of your worksheet.

During this time, also take a moment to consider the products you will be covering with the physician, and note these in **Section 2** of the worksheet. Some of the details for this section can be found in the Product Offering Worksheet you filled out earlier.

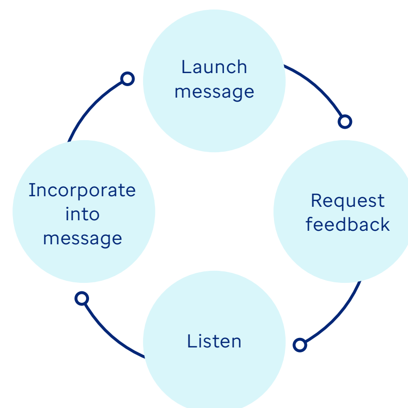
| **Section 1** | **Introduction** | | |
|---|---|---|---|
| | Time allotted for visit: | | |
| | Agenda: | | |
| | Customized value proposition: | | |
| **Section 2** | **Product offering** | | |
| | **Product to discuss** | **Offering description** | **Benefits to physician** |
| | Product No. 1 | | |

## Step 3b: Ask meaningful questions

Even with the most thorough preparation, you may have to adjust in your visit based on the physician's reaction to your message. Ask questions to determine whether your message is hitting the mark and actively listen to the physician's response. Update your message as needed to show that you have heard the physician's feedback.

In addition to preparing questions to assess the physician's reaction, you should also plan to ask questions to gain additional information about the physician. Be ready to ask about their hot-button issues, any recent changes in the practice, and whether they have given any thought to succession planning.

Take a moment to jot down your questions in **Section 3** of the worksheet, leaving the answer section blank to fill in when you meet with the physician.




| **Section 3** | **Question preparation** | |
|---|---|---|
| | Q: | A: |
| | Q: | A: |
| | Q: | A: |
| | Q: | A: |
| | Q: | A: |

### Step 3c: Master the art of the close

Often considered the most challenging element of the visit, the close should be focused on obtaining a commitment from the physician and outlining an action plan with next steps agreed upon by both parties. Use the steps outlined below to aid in your preparation of the close.

1. **Summarize**
   - Include only those benefits the physician agreed were of value
   - Be succinct and maintain momentum
   - Do not introduce any new information in the close
2. **Propose action**
   - Formulate an action plan that will require their commitment
   - Stay high-level; the sale can be lost in the weeds, and details can come later
3. **Obtain commitment**
   - Provide a timeline for next steps
   - Ensure you leave either having established preference for your services or with an outline of a physician's concerns and an action plan to address

Leave **Section 4** of the worksheet blank until you meet with the physician. During your time with them, jot down notes so you can quickly and succinctly summarize the visit and talk about next steps.

| Section 4 | Close | |
|---|---|---|
| | Summary of visit: | |
| | Proposal for next steps: | |
| | Timeline for next steps: | |

## Step 4.

# Secure supporting resources

Once your message is drafted, consider other aspects that may strengthen your visit. For instance, is this visit a candidate for enlisting executive or physician support? Does your organization have collateral on the product you will be promoting or is there something you could create?

### Step 4a: Enlist support to add value

Visit support can be a critical addition to ensure you are making the best use of the physician's time and have the appropriate conversation to track toward securing his or her business. Evaluate your opportunity using the table below to determine wither your visit needs support and, if so, what kind of support will best serve your needs.

| Support category | Support provided | Relationships they can help reach | Personality types they can help reach |
|---|---|---|---|
| **Sales support**<br>Business development executive, physician relations director | Helpful when there is a clear focus on new business opportunity; provides support with urgency, meeting management, creating dialogue and pushing for next steps | • True splitter<br>• Competitive preference splitter | • Amiable<br>• Driver<br>• Do not use with Expressive |
| **Relationship support**<br>C-suite executive | Represents the leadership team at your organization; conveys the importance of relationship and builds goodwill | • Loyal incidental splitter<br>• OP procedural splitter | • Driver<br>• Expressive |
| **Program expert support**<br>Service line leader, physician | Helpful if there is a history of issue elevation, a specific need to cover details of a service offering or address likely concerns or questions unearthed in your visit preparation; demonstrates preparation and understanding of a physicians' needs | All | All |

## Step 4b: Select visit collateral

Having devised an outreach strategy and message designed to optimize your interaction with the physician, identify collateral that will support this effort. Collateral — especially when customized — indicates thoughtful preparation and an investment in the physician relationship. Review the possible leave-behind references below to determine which collateral will best support your visit.

- Awards, satisfaction scores or quality statistics
- Service line or sub-service line program information
- CME offerings
- Information on organization-wide benefits, including EMR or health insurance benefits

### Self-guided exercise

Using the Physician Relationship Worksheet and Product Definition Worksheet you have already completed, determine the appropriate visit support strategy and collateral to bring to your visit. Complete the **Visit Resource Checklist** provided on page 14 of the appendix. This checklist can be incorporated into day-to-day visit preparation.

| Visit support | Secured? |
|---|---|
| Select type of support needed: sales, relationship, program expert | |
| **Visit collateral** | **Secured?** |
| Awards, satisfaction scores or quality statistics | |
| Service line or sub-service line program information | |
| CME offerings | |
| Information on organization-wide benefits, including EMR or health insurance benefits | |

Step 5.

# Follow-up and results tracking

Effective visit follow-up has two aspects: first, direct follow-up with the physician; and second, internal follow-up to track results. Following up with the physician demonstrates your commitment to the relationship and builds credibility. Internal results tracking allows you to trace the impact of your efforts, demonstrating the value of your outreach to your organization.

## Step 5a: Post-visit next steps

After each visit, it is critical to follow through on the next steps that you agreed upon with the physician. Follow the checklist below to ensure thoughtful and comprehensive physician follow-up.

- Thank-you note sent out to physician within 24 hours of a visit; include a summary of the interaction and confirmation of next steps discussed
- Specific follow-up from visit (for example, collateral requested, next steps calendared, introductions made) within 48 hours of visit to maintain momentum
- Issue resolution escalated internally within 48 hours of visit

## Step 5b: Tracking visit impact

It is equally critical to track the impact of your work internally. Using a data analytics tool like Optum Market Advantage, file a visit report following each physician interaction so that you, your manager and service line leadership can access your notes. If the physician you visited is part of a current initiative in the tool, note that initiative on the visit report to ensure your outreach is tracked. This will allow your outreach to contribute to the overall initiative results.

# Optum Market Advantage

## Maximize the effectiveness of your physician network strategy

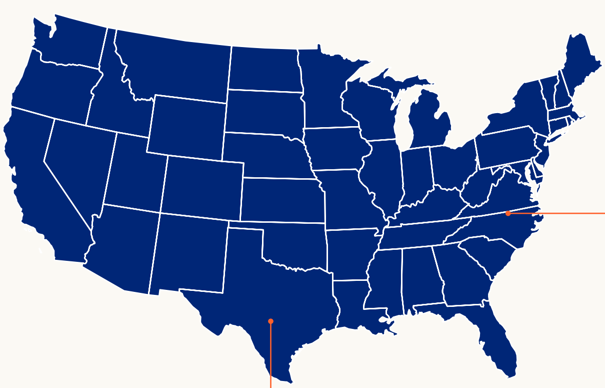
Optum Market Advantage ensures data-driven planning and focused execution against prioritized growth initiatives, while enabling the ability to react nimbly to market disruptions and competitive activity.

## We're committed to innovation and market leadership

Notable existing features

- **Physician roster integration**
  More robust repository of physician information gained from syncing national roster with other sources of physician intel
- **Network connection trending**
  Track referral and activity trends for physicians month-over-month
- **Completely refreshed mobile experience**
  Seamless iOS and Android mobile application built on the Salesforce platform
- **Initiative manager**
  Enable outreach managers to target high-value providers, measure new revenue and trend referrals across key strategic initiatives
- **Event manager**
  Run your physician events smarter by empowering your liaisons to plan and run CME sessions, physician meet-ups and open houses with greater efficiency and impact
- **Smart roster technology**
  Ability to make real-time roster updates to ensure your physician outreach team is operating as effectively as possible

## Comprehensive platform driving growth nationwide



**760+**

hospitals using Optum Market Advantage

**AMC redirects tertiary and quaternary referrals**

- Our data reveals a newly acquired PCP practice sends business to competitor-loyal cardiology group
- Fisher Medical Center* conducts outreach to educate cardiology group on tertiary and quaternary cardiac surgery program to increase surgery business
- **Result: $3.5M** annual increase is captured in referral revenue

**Succession planning recovers millions**

- Employed oncologist with high revenue shares plans to leave the market
- Azure Hospital* conducts outreach to PCPs with strong connections to the oncologist by promoting other employed oncologists to keep referrals within the hospital
- **Result: $2.65M** annualized oncology service line loss is avoided

*Pseudonym.

# Appendix

## Physician Relationship Worksheet

| | | | | |
|---|---|---|---|---|
| **Section 1** | **Historic physician relationships** | | | |
| | Top five PCP relationships | Names: | | |
| | Total count of PCP relationships | Number: | | |
| | Recent intelligence on preferences, issues and complaints | Notes: | | |
| **Section 2** | **Physician performance patterns** | | | |
| | Attending volumes in service line or sub-service line across past year | Growing | Steady | Declining |
| | Splitter assessment – total leakage and services by competitor | High | Average | Low |
| | Geographic assessment – ZIP code count for past year vs. specialty comparison group | High | Average | Low |
| | **Financial and patient characteristics** | | | |
| | Contribution margin per case across past year vs. specialty comparison group | High | Average | Low |
| | Attending revenue across past year vs. specialty comparison group | High | Average | Low |
| | Payer mix for cases across past year | Good | Fair | Poor |
| | Percentage commercial or private pay | High | Average | Low |
| | Percentage self-pay | High | Average | Low |
| | Percentage managed care | High | Average | Low |
| **Section 3** | **Physician splitter type** | | | |
| | Splitter type: | Outreach recommendations: | | |
| **Section 4** | **Physician personality type** | | | |
| | Personality type: | Outreach recommendations: | | |

# Product Definition Worksheet

| | |
|---|---|
| Date: | |
| Program: | |
| Liaison: | |
| Service line leadership: | |

**Offering description:**

| Unique components: | |
|---|---|
| Capabilities or key product services: | |
| Key specialists: | |
| Quality scores or key measures: | |
| Awards and recognition: | |
| Technologies: | |
| Access: | |
| Differentiators: | |
| Other: | |

**Competitor offerings:**

| Competitor | Offering description | Differentiators |
|---|---|---|
| Competitor No. 1 | | |
| Competitor No. 2 | | |

| Common question preparation: | |
|---|---|
| Q: What can the patient expect in terms of care? | A: |
| Q: How long will it take to get an appointment for the patient? | A: |
| Q: How will follow-up on the patient be communicated (email, phone, etc.)? | A: |
| Q: Other | A: |
| Q: Other | A: |

| Outreach plan: Strategies/Tactics |
|---|
| Q1: |
| Q2: |
| Q3: |
| Q4: |

# Scripting Template Worksheet

| | | | |
|---|---|---|---|
| **Section 1** | **Introduction** | | |
| | Time allotted for visit: | | |
| | Agenda: | | |
| | Customized value proposition: | | |
| **Section 2** | **Product offering:** | | |
| | **Product to discuss** | **Offering description** | **Benefits to physician** |
| | Product No. 1 | | |
| | Product No. 2 | | |
| **Section 3** | **Question preparation:** | | |
| | Q: | A: | |
| | Q: | A: | |
| | Q: | A: | |
| | Q: | A: | |
| | Q: | A: | |
| **Section 4** | **Close** | | |
| | Summary of visit: | | |
| | Proposal for next steps: | | |
| | Timeline for next steps: | | |

# Visit Resource Checklist

| Visit support | Secured? |
|---|---|
| Select type of support needed: sales, relationship, program expert | |
| **Visit collateral** | **Secured?** |
| Awards, satisfaction scores or quality statistics | |
| Service line or sub-service line program information | |
| CME offerings | |
| Information on organization-wide benefits, including EMR or health insurance benefits | |

# Post-Visit Checklist

| Physician follow-up | Completed? |
|---|---|
| Thank-you note sent out to physician within 24 hours of visit; include a summary of the interaction and confirmation of next steps discussed | |
| Specific follow-up from visit (for example, collateral requested, next steps calendared, introductions made) within 48 hours of visit to maintain momentum | |
| Issue resolution escalated internally within 48 hours of visit | |
| **Outreach tracking** | **Completed?** |
| Logged visit report in a tool like Optum Market Advantage | |
| Tagged visit report to any initiatives associated with the physician | |

For more information about how Optum Market Advantage provides the analytics, business development guidance and implementation support you need to meet new industry demands:

Visit us at **optum.com/strategic-planning-analytics**

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