

The case for hiring a  
**Physician Liaison**  
for relationship  
marketing initiatives



**Generating PCP  
Patient Referrals Into  
Your Vein Practice**



**Vein Specialists  
of America**  
Business Excellence. Delivered.

However beautiful the strategy, you should occasionally look at the results.

— Winston Churchill

# The Challenges

**The focus when hiring a Physician Liaison / Clinical Liaison is gaining new, preferred referrals for your practice.** While your Physician Liaison will call on your existing referral network to insure continued growth, they will also actively call on new or under-served sources for new referrals. Your Physician Liaison should use technology, patient testimonials, etc. to educate primary care physicians (PCPs) and their staff on new procedures and clinical technology unique to your practice, while they emphasize the value of your outcomes and the procedural experience of you and your clinical staff. You should make available multiple formats to achieve this – from simple brochures and marketing materials to clinical case study newsletters, webinars, CDs, or a competent discussion based on a clinical research study.

**Every potential referral physician is different and you need to take an individual approach with each physician and group practice.** Take the time to uncover the true needs and interests of each referral partner in an effort to build a professional relationship, create value, and establish the trust needed to gain lasting referrals. Follow up is critical. Take the time to insure that your new referral colleagues are completely satisfied with your care and service so that the relationship grows.

The majority of our clients that utilize a Physician Liaison want to communicate a caring and compassionate branding message that strongly differentiates them from everyone else. **They want to**

**grow by winning new doctor referrals, maintain current referral patterns, and recapture referral sources that have slipped away.**

As you consider implementing relationship marketing techniques into your practice, remember that **each referral source is looking for something completely different, but they all want their individual needs met.** Build relationships with potential referral sources by meeting their needs as they have defined them, which might take some research. Once you understand their needs, align your services to meet those needs. That demonstrates your practice's value, how well you listen, and how much you care.

In an increasingly competitive market to deliver vein care within your service area, physicians are faced with a multitude of issues threatening their success and viability as a stand alone, independent medical practice. **A constantly changing reimbursement structure and clinical protocols increasingly impact the practice of medicine.** In order to stay competitive and succeed long-term, physician leadership must take an active, structured approach to the strategic planning process to remain competitive. The paramount goal of any medical practice should be to thoroughly and appropriately assess the value you provide within your service area, and to ensure that strategic planning will foster the continued delivery of clinical value in a dynamic health care market.

Marketing is all about letting patients and referral physicians know about your qualifications and persuading them that your vein practice is the best choice for vein care in a crowded

marketplace. **For effective marketing, you have to deliver this message on an ongoing basis.** Your marketing strategy is a summary of your practice's clinical competencies and position in relation to other vein practices in your service area. Your sales and marketing plans are the specific actions you're going to undertake to achieve the goals of your marketing strategy.

To succeed in a competitive environment, it's vital to distinguish your vein practice and your clinical capabilities in a way that builds trust and inspires patient and physician referrals. **It's increasingly important to raise your visibility with direct-to-consumer marketing activities** and to extend your visibility with current and potential referral physicians through the use of a physician liaison.

So whether you want to market to win more doctor referrals, open additional offices, overcome marketplace disadvantages, differentiate yourself from the competition or simply get more patients to call you, it all starts with developing a marketing strategy and a marketing plan.

A marketing plan for a vein practice is a strategy that is designed to facilitate the achievement of specific growth goals. It is not simply scheduling an occasional free vein screening or patient event. It is an overall strategy that encompasses advertising, media relations / PR, physician referrals, patient referrals, as well as planned events to create practice exposure (free screenings, PCP lunch n learns, community education seminars, etc.).

Effective strategic planning must be understood as a process that equally emphasizes internal and external factors impacting the practice. The medical practice undertaking this process must be willing to challenge the very core of its business in light of patient needs, external PCP referral patterns, and the strengths and weaknesses of your current staff.

What are the consequences of incorrectly assessing your competitive landscape? In the current environment of declining reimbursement, increased competition and rapidly changing technology, the stakes have changed and the consequences of not understanding your competitive marketplace have gone up.

# Insightful Thinking

Tailoring your clinical and administrative operations to be more time-sensitive and reliable than your competitors' entrenches the working relationship. Your goal should be to make it easy to do business with you by being more responsive than your competitor(s).

When was the last time you evaluated the effectiveness of your efforts to build a long-lasting referral relationship with primary care physicians in your service area? Think about these proven tips to strengthen rapport and increase referral volume.

1. **Think strategically about referral patterns.** Do you know who refers to your vein practice, who doesn't, and why? Ask your front desk staff to generate a weekly or monthly referring physician report by procedure. Which physicians currently refer and what types of cases do they send? Do the non-referrers know about all of the conditions you treat or has a patient of theirs experienced a less-than-favorable visit to your office? Identifying the reasons why these physicians do and do not refer can provide the foundation for improving relationships and referral patterns.
2. **Identify other vein practices courting your referral physicians.** Success is not achieved by ignoring your competitors but rather by anticipating competitive issues and influences so you can always have a proactive plan and strategy for staying ahead of your competition. Referring physicians often report dissatisfaction with specialists who are slow or late in providing consultation reports. Review your internal processes to make sure communication flows back to the referring physician within 48 hours of seeing patients. Before and after pictures are a good idea to support your clinical skills in the referring physician's mind to encourage additional referrals. Use clinical case studies to bring attention to additional benefits of vein treatments.
3. **Good Idea!** Improve the speed of consultation reports by asking whether referring physicians can receive them via secure email. This also allows you to build a valuable email database that gives you instant access to your referral physicians.
4. **Be available.** Get patients in as quickly as you can.
5. **Listen.** Patients tell their doctor when specialists or their staff are rude or abrupt - which makes the referring physician look bad for sending the patient to you.
6. **Say thanks.** Whether it's a telephone call or handwritten note, show your appreciation by thanking referring physicians for their confidence in you.

Relationship marketing is one of several approaches you can use to promote your vein practice, but it is unquestionably the most valuable. Relationship Marketing, supported by the right integrated strategy, produces more new patients than any other method. Relationship Marketing can also be one of the least expensive marketing approaches, but it is rare to find practices executing it effectively because it is hard to do well.

When most physicians think of relationship marketing, they think of establishing and entrenching their relationships with key referral sources, such as PCPs. That's only partially right. While PCPs account for a lot of the referrals that vein practices get each year, some practices rely or focus on them too much and miss out on establishing solid relationships with their largest referral source: current patients.

Market research has repeatedly shown that previous patients refer about 40% of all new patients. Interestingly, from a clinical standpoint, former patients are the least qualified to make those referrals. Instead, they base their referrals on how they feel about you as well as their experiences with your staff. Before you spend another dollar on external resources to market your vein practice, devote time to ensuring that the service you deliver to patients doesn't just produce satisfaction or loyalty, but also creates patient advocacy. True patient advocates are your most valuable marketing assets. They not only return to you for additional services, but rave about you to others.

## Meticulous Execution

The majority of doctors who retain VSA to market their vein practice want to communicate a caring and compassionate branding message that strongly differentiates them from everyone else. They want to grow by winning new doctor referrals, maintain current referral patterns and recapture referral sources that have slipped away.

We know it's vital to distinguish your brand and reputation in a way that builds trust and inspires patient and professional referrals. It's increasingly important to reach men and women in the workplace, to ethically raise your visibility with direct to consumer marketing and to extend your presence in the medical community through the use of a physician liaison.

**Finding the Right Candidate.** Our experience in this area has taught us that if you are going to have a successful Physician Liaison, it takes more than finding someone with an outgoing personality. Your Physician Liaison needs to have the ability to listen and understand what your referring physician is truly saying. They should have great attention to detail and excellent organization and follow-through skills. They need to be problem-solvers and be able to facilitate solutions, calling upon resources within your practice. And they need to have "conceptual" selling skills so they can be your communication eyes and ears.

Can you get this from an entry-level hire? Perhaps, but it is going to take time, training and someone to mentor your new liaison, which in many cases practices cannot devote. Ideally you should be looking for someone that has been in a sales capacity in a physician services environment and has already been through a variety of sales training programs. To hire a “Marketing” versus a “Sales” person or move a clinical person into a Physician Liaison role, is often a difficult transition for them due to their lack of experience making sales calls.

**Setting Objectives for Your Physician Liaison.** One of the challenges for a Physician Liaison role, particularly if it is new to a practice, is staying focused on the job responsibilities. Inevitably what happens is that if something even has the slightest orientation to a sales and/or marketing responsibility, most people in the practice will direct it to the Physician Liaison. As this continues over time, the Physician Liaison becomes engulfed in day-to-day “stuff” and is not able to get into the field, fulfilling what they were hired to do ... calling on current and potential referral sources each and every day. To avoid this all too common situation, it is important to set clear, measurable and quantifiable objectives for your Physician Liaison so that they know what is expected of them.

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**Some of the measurable goals that can be established for a Physician Liaison are:**

- ✓ # of visits per week to referring physician offices
  - ✓ # of meetings facilitated for practice MDs with referring physicians
  - ✓ # of lunch and learns coordinated with referring practices
  - ✓ # of social events scheduled with your practice and referring practices
  - ✓ # of referral coordinator lunches scheduled
  - ✓ # of speaking engagements / community events coordinated
  - ✓ Submission of weekly activity report
  - ✓ Written documentation of all relationship marketing activities
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**Mentoring Your Physician Liaison.** A challenge for many vein practices is what do you do with this person? For practices that have no experience with a Physician Liaison, the short answer is that you need to mentor them, provide them with an opportunity to succeed, give them clear direction, and monitor their activities not only through their reports but also by spending time with them in the field making calls on your referral sources. Giving them a list of your referring physicians and telling them to make calls and deliver referral pads is potentially a recipe for disappointment.

On a weekly basis you should meet with your Physician Liaison and review the planned activities for the week. Questions that you and the Physician Liaison should discuss include: What are the objectives of your calls? Who are you going to call on in the practices? Who in the practices determine where referrals are

sent? What do you want to accomplish with the calls? What have been their referral trends? Have there been any problems expressed by these practices? In other words, you need to strategize with the Physician Liaison on their calls. Leaving them on their own to do this will likely not yield the results that you are looking for.

**Tracking Physician Liaison Activities.** On a weekly basis, the Physician Liaison should submit an activity report. The Physician Liaison should document what practices they visited, who they spoke to, what information they left with the practice, and any issues that were identified and follow up that may be required.

**Targeting the Referral Influencer.** While private practices are physician owned and controlled, the bottom line is that the physicians don't necessarily always influence where the patient is sent for additional testing or consults. More often than not a referral coordinator, check out person or mid-level will play a key role in where the patient is referred. As part of the Physician Liaison's role, they need to determine who coordinates referrals within these practices and then target them from a relationship building standpoint.

**Involving Physicians in the "Relationship Marketing" Process.** One of the most effective marketing initiatives is getting your vein physician(s) face-to-face, developing relationships with your current and potential referring physicians. Your Physician Liaison should be a conduit to facilitate these encounters. An effective relationship building technique is to bring your physicians to referring physicians office for a "check in" with the physicians and staff regarding how your

practice is performing on behalf of their patients. It does not need to be a formal, sit-down meeting but the fact that you are showing them that you value your relationship will end up paying dividends.

**Report Generation.** As part of your Physician Liaison's responsibilities, they should be the "go-to" person for collecting, analyzing and disseminating reports related to referral activity.

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Some examples of tracking reports include:

- ✓ Monthly referrals by referring physician
  - ✓ Monthly new consults by referring physician
  - ✓ Monthly referrals, new consults and total visits per office location
  - ✓ Source of self-referred patients by month (e.g. friend, print ad, direct mail, etc.)
  - ✓ New patients generated as a result of community screening programs
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**Considerations.** Implementing a Physicians Liaison program is a very viable initiative to enhance relationships, increase visibility and grow referrals for your vein practice. However, to have a successful Physician Liaison program and an overall effective marketing strategy, you first need to have a strategic marketing plan before you can "work the plan". Marketing is a process rather than an event. To position yourself to "market", you need to develop a plan, looking both internally to evaluate the current state of your practice and externally to analyze your market and define specific goals, tactics and action plans.



# Exceptional Results

## Physician Liaison Case Study Report Date: January 6, 2014

The following pages contain data from a case study conducted using clients of Vein Specialists of America.

## Analysis Parameters

1. number of participants: (5) VSA practice management clients
2. 3-year study
3. 2011 and 2012 revenue tracked without the use of a Physician Liaison
4. 2013 revenue tracked utilizing a Physician Liaison
5. Revenue was tracked for the following procedures performed on each new patient referred to the practice as a direct result of Physician Liaison relationship marketing activities:
  - Initial Consultation (99202, 99203)
  - Return Office Visit (99212, 99213)
  - Duplex Ultrasound (93970, 93971)
  - Endovenous Laser Ablation (36478, 36479)
  - Cosmetic Sclerotherapy (36468)
  - Ultrasound Guided Sclerotherapy (36470, 36471, 76942)
  - Ambulatory Phlebectomy (37765, 37766)
  - Compression Stockings
6. Physician Liaison comp model & marketing budget (**\$91,300**)
  - \$35.00 per hr / 24 hrs per week (Tues, Wed, Thurs). \$43,680 plus payroll taxes and benefits. (Approximate cost \$70,000).
  - \$525 month expense allowance (auto + cell allowance). \$6,300 total.
  - Physician Liaison marketing budget \$15,000

## Practice #1

2011 New Patient Consults 217 total

2012 New Patient Consults 266 total

2013 New Patient Consults **417 total**  
(with Physician Liaison)

### Observations:

- New Patient Consults **increased** by 151 / avg. 12.58 per month.
- Receipts **increased** by \$584,974, an average of \$48,747.83 per month.
- The average receipt for each new consult was \$3,874.00.
- Gross Receipts of \$584,974 less the cost to employ the Physician Liaison of approximately \$91,300, leaves a **net gain to the practice of \$493,674.**

### Return on Investment:

- For every \$1.00 spent on the above described Physician Liaison Program, relationship marketing activities **generated \$6.41.**
- After paying for the Physician Liaison Program, relationship marketing activities **generated \$493,674.**

## Practice #2

2011 New Patient Consults 96 total

2012 New Patient Consults 113 total

2013 New Patient Consults **176 total**  
(with Physician Liaison)

### Observations:

- New Patient Consults **increased** by 63 / avg. 5.25 per month.
- Receipts **increased** by \$259,434, an average of \$21,619.50 per month.
- The average receipt for each new consult was \$4,118.00.
- Gross Receipts of \$259,434 less the cost to employ the Physician Liaison of approximately \$91,300, leaves a **net gain to the practice of \$168,134.**

### Return on Investment:

- For every \$1.00 spent on the above described Physician Liaison Program, relationship marketing activities **generated \$2.84.**
- After paying for the Physician Liaison Program, relationship marketing activities **generated \$168,134.**

## Practice #3

2011 New Patient Consults 328 total

2012 New Patient Consults 274 total

2013 New Patient Consults **382 total**  
(with Physician Liaison)

### Observations:

- New Patient Consults **increased** by 108 / avg. 9.00 per month.
- Receipts **increased** by \$425,736.92, an average of \$35,478.08 per month.
- The average receipt for each new consult was \$3,942.01.
- Gross Receipts of \$425,736.92 less the cost to employ the Physician Liaison of approximately \$91,300, leaves a **net gain to the practice of \$334,436.20.**

### Return on Investment:

- For every \$1.00 spent on the above described Physician Liaison Program, relationship marketing activities **generated \$4.66.**
- After paying for the Physician Liaison Program, relationship marketing activities **generated \$334,436.20.**

## Practice #4

2011 New Patient Consults	178 total
2012 New Patient Consults	195 total
2013 New Patient Consults	<b>242 total</b>
(with Physician Liaison)	

### Observations:

- New Patient Consults **increased** by 47 / avg. 3.92 per month.
- Receipts **increased** by \$188,846.32, an average of \$15,737.19 per month.
- The average receipt for each new consult was **\$4,018.01**.
- Gross Receipts of \$188,846.32 less the cost to employ the Physician Liaison of approximately \$91,300, leaves a **net gain to the practice of \$97,546.32**.

### Return on Investment:

- For every \$1.00 spent on the above described Physician Liaison Program, relationship marketing activities **generated \$2.07**.
- After paying for the Physician Liaison Program, relationship marketing activities **generated \$97,546.32**.

## Practice #5

2011 New Patient Consults	287 total
2012 New Patient Consults	346 total
2013 New Patient Consults	<b>467 total</b>
(with Physician Liaison)	

### Observations:

- New Patient Consults **increased** by 121 / avg. 10.08 per month.
- Receipts **increased** by \$487,367.43, an average of \$40,613.95 per month.
- The average receipt for each new consult was **\$4,027.83**.
- Gross Receipts of \$487,367.43 less the cost to employ the Physician Liaison of approximately \$91,300, leaves a **net gain to the practice of \$396,067.43**.

### Return on Investment:

- For every \$1.00 spent on the above described Physician Liaison Program, relationship marketing activities **generated \$5.34**.
- After paying for the Physician Liaison Program, relationship marketing activities **generated \$396,067.43**.



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