



Leveraging Existing Relationships to Generate More Business

■ FRANK H. LEONE, MBA, MPH

Urgent care clinic operators tend to think of increasing employer-generated volume primarily in terms of new prospects; that is, they tend to believe that growth is attained primarily by expanding their client base.

But in many cases, there is as much—if not more—opportunity inherent in selling additional services to existing clients. And “cross selling” to existing clients is just one of many potential advantages that your clinic can accrue by leveraging the positive relationships that you are likely to have with many existing employer clients.

Before trying to figure out what else you can sell those clients, though, you must first ask: Are they happy with the relationship and with the services we are already providing?

It is risky business to assume that a given employer client is happy with your clinic’s services simply because you have not heard anything to the contrary. Accordingly, you should seek multiple opportunities to continuously assess client satisfaction.

For example, you can place quarterly “check-in” calls to high-volume clients or send an annual questionnaire to all employer clients.

The long-run viability of incorporating occupational health services into an urgent care clinic’s service mix lays in its ability to expand the scope of services for employer clients. If the clinic focuses entirely on injury management, then the occupational health component of the business is likely to perish, over time. Thus, developing and marketing additional services to your existing customer base becomes a central survival strategy.

You have several advantages in dealing with an existing client, compared with the challenge of landing a new one:

- You (and/or your clinic) know the client and—presumably—have generated a foundation of trust. Since attaining trust and credibility is never an easy task, a large hurdle has already been successfully navigated.
- The client is a previous buyer/user of your clinic’s services. They have used you in the past; they know that, and so do you.
- Presumably, you know the client’s business and are well positioned to understand how a proposed new service will fit into the larger picture.

Building on these positives, you now need to leverage these relationships by emphasizing the inherent merit of an integrated approach to each employer client’s healthcare needs. Consider the following:

“Our foremost goal is to make the greatest possible impact—both health status-wise and cost management-wise—at each client’s workplaces. We recognize that the best way to make such an impact is through carefully integrated delivery of services. To date, we have provided [specific service(s)] to your company. Now that we know your company better, we realize that by also offering [specific new services], the impact to your workplace health status, and to your bottom line, would be even more dramatic.”

Generating Leverage on the Marketing Side

Building on existing relationships does not end on the sales side. Let’s look at some examples on the broader marketing side:

- *Employers as references*
 - Three hard rules apply:
 - Find a mechanism by which to ask every employer client to serve as a reference and build up as long a list as possible.
 - Overwhelm reference readers with volume. If 100 employers are willing to serve as a reference for your clinic, list them all; it provides exceptional credibility.
 - Provide as much information about each reference as



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makes sense (e.g., name, title, company, phone, email address).

■ *Employer testimonials*

Employer testimonials enhance your marketing effort with the glow of others' words rather than transparent, self-serving boasts. Systematically request testimonials (e.g., through an annual employer questionnaire), then archive quotes as applicable for appropriate audiences.

■ *Direct employer referrals*

Employers know other employers. There is nothing wrong with asking a happy client to make a call (or send an e-mail) to one or more selected colleagues on your clinic's behalf.

■ *Referring physicians and payors*

Both groups may offer multiple contacts and, in the case of payors, numerous clients. Once a good relationship has been established, there is nothing wrong in asking for a referral in your behalf.

■ *Patients*

Reach out to patients; they talk, too, and in many cases may be with a new employer soon. Such a patient focus makes even more sense in an employee-choice state.

■ *Your own organization*

Considerable leverage is often available close to home. For example, many staff members may have a spouse who works at a target company, or a friend or neighbor at one of your high-profile prospect companies. Potential entrees may be, as they say, right under your nose.

Leveraging existing relationships should filter through every aspect of your sales and marketing plan. If your clinic limits itself solely to bilateral communication with prospects, you are shortchanging your ability to generate additional business. ■

Next month in Occupational Medicine:

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TAKE-HOME POINTS

- Selling additional services to existing clients—as opposed to only adding new clients—is a good way to grow the business.
- Using satisfied customers as references makes good marketing sense.
- Referrals for potential new clients can come from referring physicians and payors, patients, and your own employees.



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