



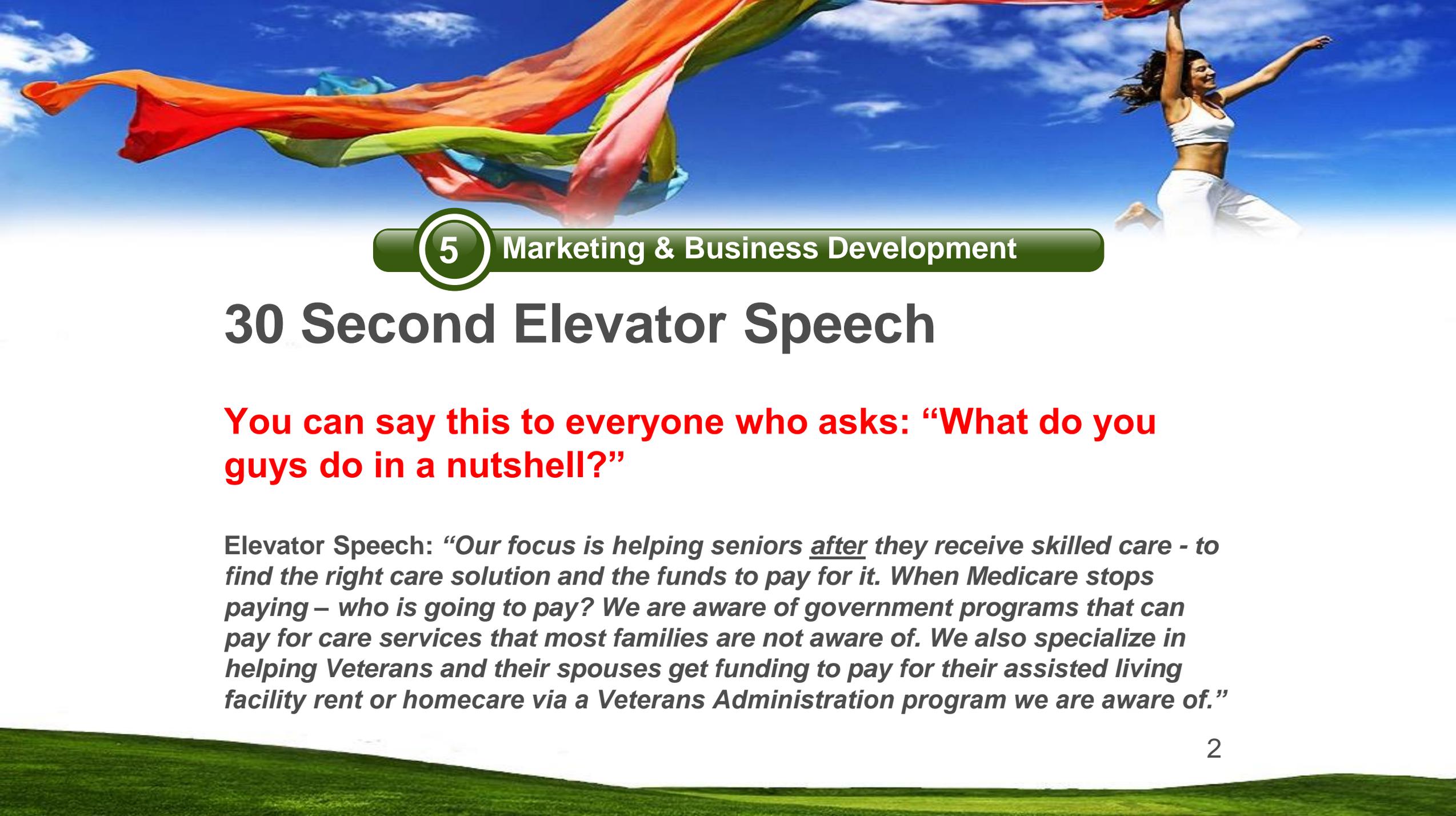
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## Marketing & Business Development

### Getting Referrals

Its HARD to walk into a SNF or Hospital or a new place and find people to ask for referrals!

You need a game plan or you will lose the game!



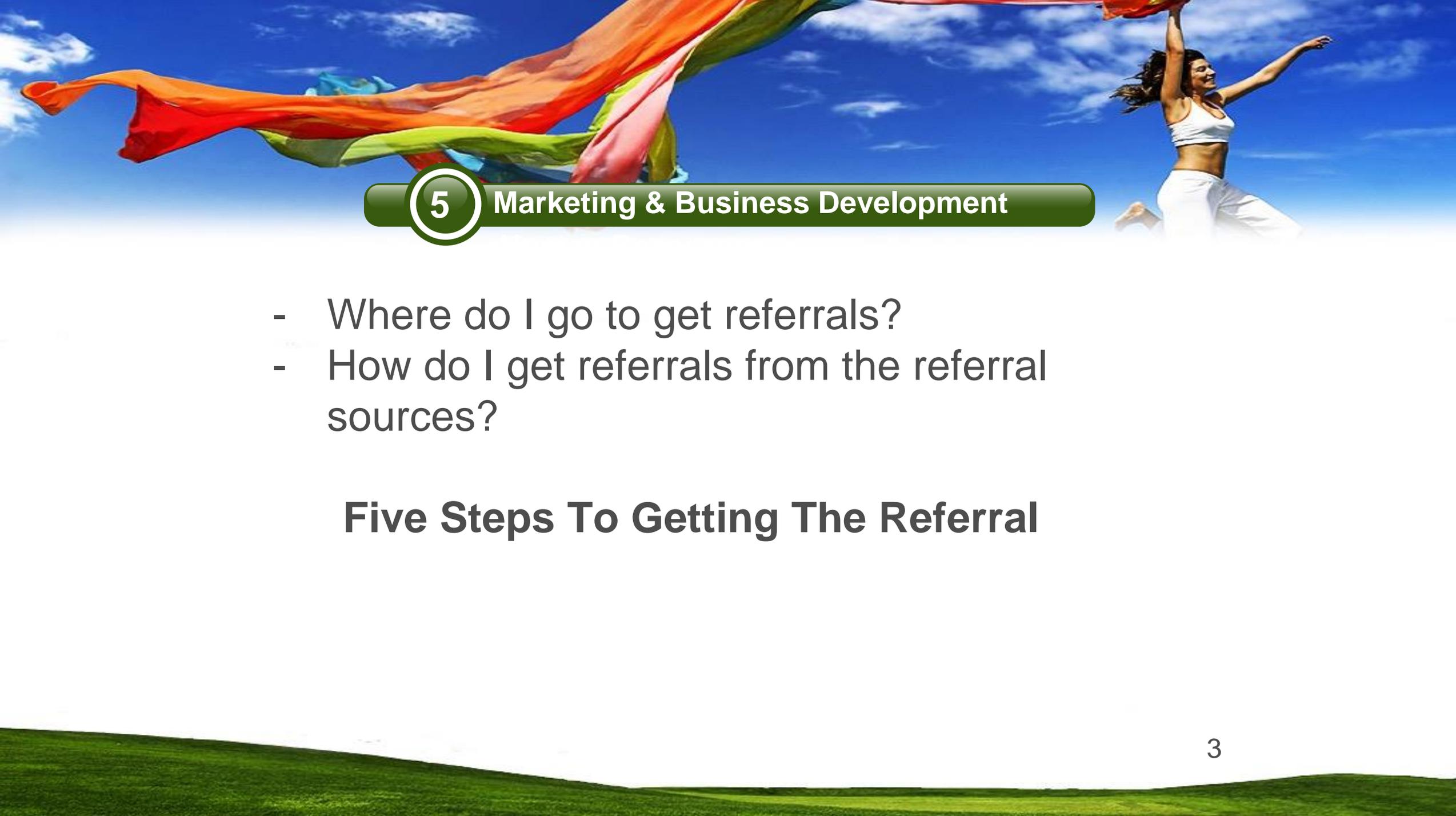
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Marketing & Business Development

## 30 Second Elevator Speech

**You can say this to everyone who asks: “What do you guys do in a nutshell?”**

*Elevator Speech: “Our focus is helping seniors after they receive skilled care - to find the right care solution and the funds to pay for it. When Medicare stops paying – who is going to pay? We are aware of government programs that can pay for care services that most families are not aware of. We also specialize in helping Veterans and their spouses get funding to pay for their assisted living facility rent or homecare via a Veterans Administration program we are aware of.”*



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- Where do I go to get referrals?
- How do I get referrals from the referral sources?

### Five Steps To Getting The Referral



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## Marketing & Business Development

### Step 1 – Identify Your Potential Referral Sources

Tier 1 – Hospitals – Find 2-3

Tier 2 – SNFs – Find 5

Tier 3 – ALFs, ILFs, Doctors Offices, Home Health Agencies – Find 5

Tier 4 – Senior Centers, Adult Day Centers – Find 2

Total: 14-15 facilities

**Activity:** Go to [www.medicare.gov](http://www.medicare.gov) and [www.skillednursingfacilities.org](http://www.skillednursingfacilities.org) and find SNFs in your area that have a minimum of 50 beds and a focus on Medicare Rehabilitation. SNFs with lots of Medicaid beds are not a good fit. See “Day To Day Sales & Marketing\_READ ME FIRST” document.

- Do a **Google search** for Assisted Living facilities in your area.

- Visit your local **Area Agency on Aging** – they have lists of ALFs, ILFs, etc.



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## Marketing & Business Development

### Step 1 – Identify Your Potential Referral Sources

#### Tier 1 – Hospitals – Find 3

- The industry says it takes **6-12 months** to get first referral. However, our VA Program and/or a strong Preferred Partner can get you in within weeks.
- **Urgency of Care is high:** 0-2 day discharge notice.
- **Visit 1 time a week. Just quick drop bys to drop off a new flyer or discuss a new program you want them to learn about.**
- The industry says to not start marketing to hospitals until you have at least a handful of clients and caregivers. We say “It depends” on how quick you can get a caregiver to jump in when you get a new client.



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## Marketing & Business Development

# Step 1 – Identify Your Potential Referral Sources

## Tier 2 – SNFs – Find 5

- Industry says it takes **3-5 months** to get the first referral. We say 3-5 weeks with our VA Program and/or a strong Preferred Partner.
- **Urgency of Care** is relatively high: 4-5 day discharge notice. Patients too sick to go home from the hospital – so discharge to a SNF. High amount of hours of care usually needed when discharged from SNF to home.
- **Visit 1 time a week. Just quick drop bys to drop off a new flyer or discuss a new program you want them to learn about.**



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## Marketing & Business Development

# Step 1 – Identify Your Potential Referral Sources

## Tier 2 – SNFs – Find 5

**Focus on NON Medicaid SNFs with 50+ beds and discharge lots of patients. Call them and ask them how many beds they have and how many are for Medicaid patients! Many SNFs are Medicaid focused depending on the area you are in – so ensure you are not going after those – unless they also have beds that are Medicare beds and have a big need to discharge people home (not to the Medicaid side of their SNF).**

**TIP:** “I’m doing research for a student project on skilled nursing facilities at UCLA....and I have two quick questions: How many **Medicare** beds do you have versus **Medicaid** beds? My second question is how many patients (approximately) do you discharge on a weekly basis?” Then email a copy of your findings to [research@ucla.edu](mailto:research@ucla.edu)



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## Marketing & Business Development

# Step 1 – Identify Your Potential Referral Sources

### Tier 3 – ALFs, ILFs, Doctors Offices, HHAs – Find 5

<https://www.homehealthcareagencies.com/>

- The industry says it takes **1-3 months** to get the first referral. Low hanging fruit. By helping their residents of ILFs and ALFs get the VA Benefit (which can pay for additional home care services – with no cost to the Veteran/their spouse) you will get referrals in 1-3 weeks.
  - **Urgency of Care is relatively low: 7+ day care need notice. ALF provides some assistance with ADLs. ILF does not – apartments for seniors with a little more.**
  - **12-20 hours a week of care usually needed.**
  - **Visit 1-2 times a month. NOTE: Physicians (Doctors offices) often do “rounds” in hospitals so they can be a great preferred partner. Find the Doctors that have**
- 8
- relationships in Tier I and Tier II facilities.



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## Marketing & Business Development

### Step 1 – Identify Your Potential Referral Sources

#### Tier 4 – Senior Centers and Adult Day Care Centers – Find 2

- Take 1-2 months to get the first referral.
- Urgency of Care is low: 10+ day care needs notice.
- Visit 1 time a month.
- Senior Centers are good places to present your VA Benefit Presentation. Many may need some extra help but don't want to pay out of their own pocket long term.
- Adult Day Care clients usually want split shifts and those are hard to fill. Again, good for the VA Program as it can pay for their home care.



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## Marketing & Business Development

### Step 1 - ALWAYS Pre-Qualify Your Potential Referral Sources... Start now!

**Pre-Qualify Them Now by “Shopping” them.** Call and ask for the “Discharge Department”. Once you get a Discharge Planner on the phone - say, “Hi, I have a friend who will likely be going to your facility and I am wondering what services are provided to help him after he gets discharged from your facility?...Do you know any companies that can help my friend once he gets home – with bathing, driving, etc.?... Do you have a list of these companies?.... Can I get a copy of the list?... Have you had any customers tell good things about any of the companies on the list?” **Make a list of the facilities that refer a lot of patients to home care agencies.**



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### Step 2 - Getting into a facility – The Cold Call Way

Going into a new facility can be daunting to say the least! However, you need to be confident in the services you are providing. Walk into a facility front desk and say:

***“Hi, I’m Mary Robinson and I’d like to speak with a social worker about the discharge of a patient.”***

**If you get in front of the social worker:** – tell them the following: **“My name is Mary Jones and I stopped by your office today to setup a “Meet and Greet” to discuss a funding program my homecare company has to help veterans or spouses of veterans pay for a portion of their rent while living in their facility or covering homecare assistance at their home – after discharge. I’ll be back in this area the day after tomorrow – would 2pm work for a quick “Meet and Greet”?”**



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## Marketing & Business Development

### Step 2 - Getting into a facility – The Cold Call Way

If you don't get in front of the Social Worker – then ask for their business card. Then go home and email them the following email (make sure you have an email signature and that you are using your domain email address: i.e. [bob.walker@bobshomecare.com](mailto:bob.walker@bobshomecare.com))

Hi \_\_\_\_\_,

My name is Mary Jones and I stopped by your office today to setup a “Meet and Greet” to discuss a funding program my homecare company has to help veterans or spouse of veterans pay for a portion of their rent while living in their facility or covering homecare assistance at their home – after discharge from your facility. Getting aide care in place improves their wellbeing and reduces their need to go back to the hospital. I'll be back in this area the day after tomorrow – would 2pm work for a quick “Meet and Greet”?

**Best Regards,**



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## Marketing & Business Development

### Step 2 - Getting into a facility – **The Cold Call Way**

Once you get the “Meet and Greet” setup you will go in there and do your VA Program PowerPoint presentation in 3-5 minutes and give them:

- 1) Your VA Brochure
- 2) Your Patient Advocacy Brochure
- 3) Your Standard Home Care Brochure
- 4) All of the above sitting inside your Presentation folder which has your business card in it.

NOTE: We will discuss marketing materials on Friday!

*You then tell them you want to setup a “Lunch and Learn” for all of the discharge planners at their facility to educate them too. Go to the “Lunch and Learn” in Step 4.*



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### Step 2 - Getting into a facility - **The Preferred Partners Way** (If the Cold Call is not working)

Medical Partnering up with other like (but not competing) businesses can be a great source of referrals!

Companies like: [ALF Placement Reps](#), Durable Medical Equipment companies, Assisted Living Facilities, Independent Living Facilities, Home Healthcare Companies, Hospice Companies can be great Preferred Partners. Find them at: [www.medicare.gov](http://www.medicare.gov)



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## Marketing & Business Development

### Step 2 - Preferred Partners

**A) You can cold call on these companies at their physical location to develop Preferred Partnerships.**

**Go to their Front Desk** and ask to speak with their **Sales and Marketing Rep.**

**Ask the Marketing Rep some questions. For a Durable Medical Equipment Company: How long have been in business, what area do you service? What type of equipment do you have?... Can you show me around...**

**Then say: I'm the owner of a Home care agency in the area. We are going to be going through a rapid expansion and I know when I go into people's homes that they need a lot of equipment and home modifications to help them stay at home and so we are looking for a dependable and reliable durable medical equipment company to provide these products. Would you be interested in working with me?**



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## Marketing & Business Development

# Step 2 - Preferred Partners

### B) Or you can meet the Marketing Reps at local Network Events:

Talk to your local Area Agency on Aging (AAA) to get plugged into all the networking events in your area. **They are also a great source of referrals!** Let them know about your VA Program.

Ask them “I’m new in the senior care industry in this area...how do I get plugged into the senior care networking events around here?” **Your goal** is to partner with companies that will be able to refer their home care patients to you.

**TIP: ALF Placement Reps** can be a gold mine of referrals. Talk to them about paying them 8% of your gross revenue on any clients they refer that come onboard. This encourages them to send you longer term clients. **A Place For Mom** charges 10%. A Place For Mom can be a good referral source too.



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## Marketing & Business Development

# Step 2 - Preferred Partners

**At the networking event - ask questions first:**

Hi, I'm Josh, what's your name? So what company do you work for? What do you do for them? How long have you been doing that with them? I bet you learn a lot from those patients you take care of, huh? What is the patient census of your company? What types of patients do you work with? What is your service area? What territory do you market to? Where you born and raised around here? Did you go to school around here?

You are qualifying the person in 5-10 mins.



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## Marketing & Business Development

### Step 2 - Preferred Partners

If not a fit then exit politely and give them a card and say you look forward to meeting them again sometime.

If they are a fit then book a meeting right there. Say, “There are a few people here at this event that I still need to talk to but I like the way this conversation is going so why don’t we continue this over coffee sometime? I’ll buy – my treat! Sound good?... ok, how about (look at your phone calendar) Tuesday at 9:30am?

Book it then and there!



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### Step 2 - Preferred Partners

**When meet up for coffee: 45 minute meeting.**

- **Its all about them during the first 20 mins.** Get to know them better personally. Did they grow up around here? Etc. **10 mins.**
- **Then, ask more about their job/business...** what do you do? Any special focuses? What is your census? Who do you partner with? How do you market yourselves? **10 mins.**
- **Then they will naturally ask: “What about you?” Tell them about yourself, your reason for getting into senior care, some info about your company: territory, types of services, specialties, caregiver training, etc. readmission rate, etc... from Lunch & Learn presentation (will cover later) 10 mins.**



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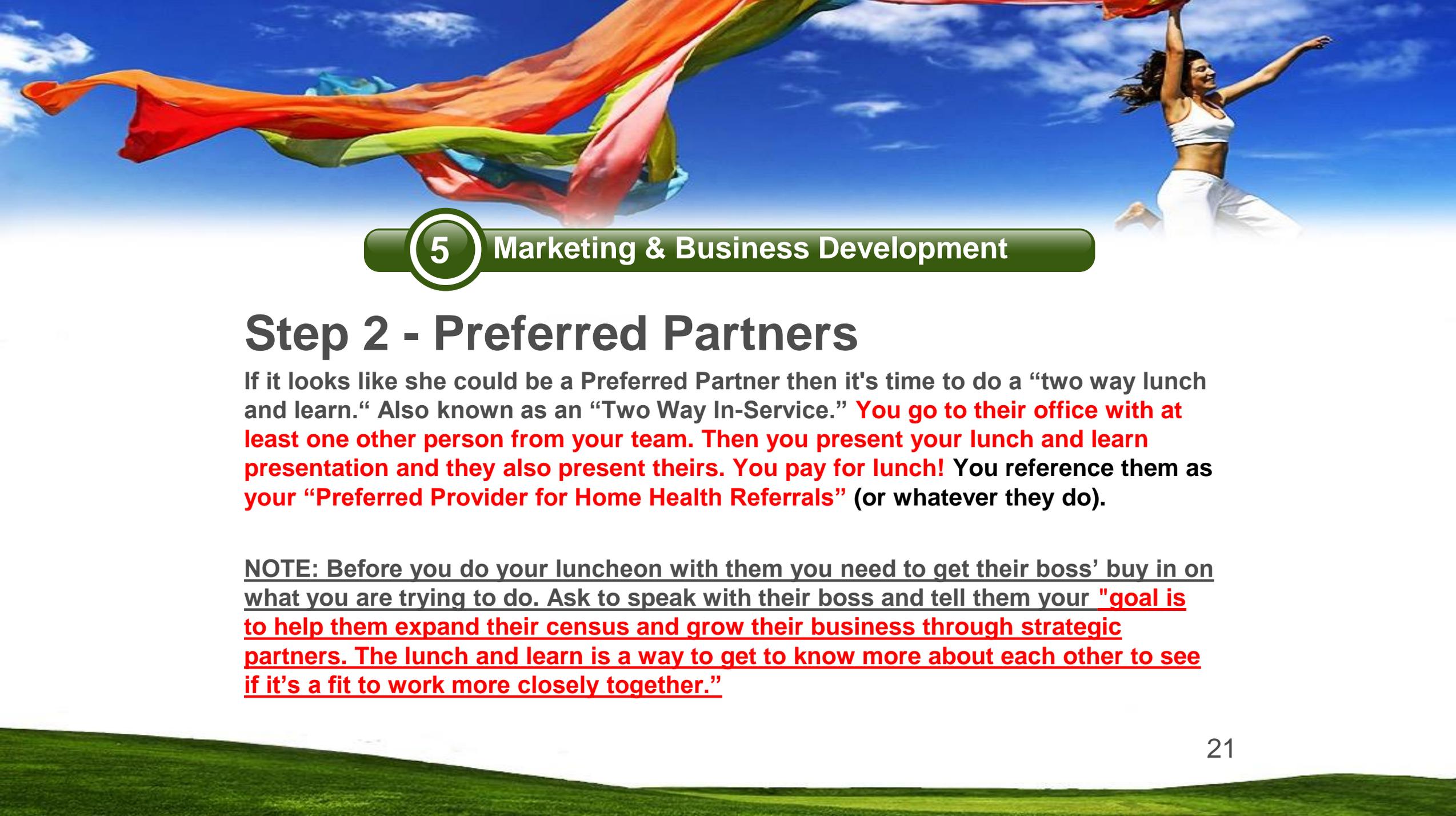
## Marketing & Business Development

### Step 2 - Preferred Partners

Then say, “Sarah, I had a feeling that you were the right person when I met you at the networking event last week. Everything you are talking about makes sense. I've been looking for a good home health person to partner up with.”

Then go through these things:

- 1) I know I could refer business to you. When I have a client that needs Home health skilled care I don't want to just refer them to any company - I would much rather refer them to you - someone that I can rely on and trust. Would it be ok if I refer to you Sarah?
- 2) Now Sarah, do you ever have patients that are needing personal care in addition to Home health? Does that ever happen? Would you be willing to send them my way?...*(smile)*...
- 3) What about collaborating on events? What type of events do you have coming up? What about marketing campaigns? Could we co-sponsor and share with the cost?



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## Marketing & Business Development

### Step 2 - Preferred Partners

If it looks like she could be a Preferred Partner then it's time to do a “two way lunch and learn.” Also known as an “Two Way In-Service.” **You go to their office with at least one other person from your team. Then you present your lunch and learn presentation and they also present theirs. You pay for lunch!** You reference them as your “Preferred Provider for Home Health Referrals” (or whatever they do).

NOTE: Before you do your luncheon with them you need to get their boss' buy in on what you are trying to do. Ask to speak with their boss and tell them your **"goal is to help them expand their census and grow their business through strategic partners. The lunch and learn is a way to get to know more about each other to see if it's a fit to work more closely together."**



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### Step 2 - Preferred Partners

Timeline for setting up a luncheon is usually 1-3 weeks after you have coffee.

Present lunch and learn presentation – **see in a few more slides.**

After the lunch and learn - start co-marketing together. Go to each other's target facilities together for 4 weeks.



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### Step 2 - Preferred Partners

Then go separately on the 5th week. The referral source will ask “where is your partner”.... They are now starting to associate you as a “team”. You can also be in one facility twice in one week as your partner will circle back there later in the week without you too!

After doing four “together visits” and one “alone visit” each month for 3 months - the preferred partner can give out your card when they have a client for non medical home care - as the referral source knows you work together. You can give out their card for Home Health and talk to clients and sell up each other's companies! It's a win-win!



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## Marketing & Business Development

# Step 2 - Referring To Preferred Partners

Anytime you go and market your services to any referral source you should have brochures and business cards from your Preferred Partners. Then, you can give the referral source a brochure if they mention hospice services for a patient and you just happen to be there that day. This is how you “co-market” with your Preferred Partners. Keep in mind that you will be visiting the referral sources WITH your Preferred Partners on a regular basis so they will automatically associate you with them over time and may ask you for the Hospice Company’s contact info – if they have a Hospice need.

Also, whenever a home care client gets admitted to the hospital, their family should be given a brochure on your Preferred Partners so when they are discharged they get referred to your preferred partner Home Health Agency or Hospice, or SNF.



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## Marketing & Business Development

# Step 2 - Referring To Preferred Partners

Also, the average time a patient is on Hospice is 18 days. You can help extend that time frame if the patient is kept comfortable at their home and also help prevent them falling and hurting themselves and getting discharged to the hospital and leaving Hospice care.

So, if a potential Hospice Preferred Partner asks “How will you refer to me?” – this is what you tell them! You can also tell them that whenever you encounter a referral source at a hospital or a patient at a hospital that are looking for a hospice company – you will refer their hospice company!



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## Marketing & Business Development

### Step 2 - Preferred Partners

**Now create more Preferred Partners** and introduce them and send out weekly emails with motivational quotes and then add places you plan to visit that week and say “who wants to come with you on some of them?” Find networking events all of you can go to and meet up and meet new people that could be new referral sources for all of you!

**Make sure everyone knows what everyone does and has an elevator pitch for each other so can explain to new referral sources.**

**When each of you are out marketing you can vouch/talk for each other if they ask about another's services.** i.e. “Oh, you need hospice, well have you met Peter King from Angels Hospice? No? Oh, you need to meet him – he is the best!” It always looks good to have someone else vouching for your services!



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## Marketing & Business Development

### Step 2 - Preferred Partners

Use Preferred Partners to advertise co-marketing events at hospitals and skilled nursing facilities – to get to know their staff.

Most all in the industry agree that Hospitals are CLOSED systems. They are next to impossible to penetrate unless you know someone who can get you inside. Using excuses like “We would like to invite your staff to an event where they can learn more about reducing hospital re-admissions” is something that can sometimes get you past a gate keeper in a hospital – especially if you are with one or two other companies (i.e. 2 or 3 of you show up together). There is power in numbers!

NOTE: You need to be READY to move quickly when dealing with hospitals. They will often discharge and expect same day or next day care start dates. We recommend marketing to them when you have at least 10 full time caregivers so you can schedule quickly.



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## Marketing & Business Development

### Step 2 - Create a Senior Care Organization

**Create an Alzheimer's Support Group – use the HBO videos or any other videos on Alzheimer's. Watch 30 mins of the video and then discuss each participants “Peaks and pits” of the week.**

**This is for people with parents who have Alzheimer's.** You can host at a SNF or ALF or Hospital. Make flyers and hand out to all social workers and potential referral sources and let them know “to refer any family members who are struggling with their aging parent who have Alzheimer's.” **You can also have Music Bingo at the beginning and have the kids get involved with their parents.** Then have the parents go and do something else while you have the Support Group.

**Talk to your Preferred Partner about creating one at their facility! Having an employee from Alzheimer's Associate “Sponsor” the group looks good on the flyer too – they can show up every now and then.**



**5** Marketing & Business Development

**Some days are better than others as a sales rep.**



**I AM READY TO GET HURT AGAIN.**



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## Marketing & Business Development

# YOU CAN DO THIS!

There is no difference between you and other  
AHI Agencies that are in the \$4+ Million Club.  
If you are willing to do the work you will also  
be successful. It's as simple as that!