Emergency Preparedness for Business Development During Pandemic

CRM Solution Utilization:

☐ Identify data (see below) you will track and identify fields in your CRM solution that you will use to manage.

☐ Provide training to users.

☐ Determine how Referral Center Staff (Intake) will access information to guarantee execution of individual communication proocols.

☐ Analyze the need for inside sales professionals. If needed, determine how to implement.

Current key account communication protocol management:

Agency level (per office): (Information will be collected by Sales Professionals below but should be aggregated so that all senior leadership can access information for the agency's top 25 accounts)

☐ List of top twenty-five accounts based on prior 12-month admissions

For each of these accounts:

☐ Identify contact for patient referral information

☐ Identify allowable communication methods with preferences (email, text, cell, backline, etc.)

☐ Identify contact for patient updates

☐ Identify allowable communication methods with preferences

☐ Identify contact for patient orders

☐ Identify allowable communication methods with preferences

☐ Identify contact for patient order signatures

☐ Identify allowable communication methods with preferences

Sales Professional Level:

☐ List of top twenty-five accounts based on prior 12 month admissions

For each of these accounts:

☐ Identify contact for patient referral information

☐ Identify allowable communication methods with preferences

☐ Identify contact for patient updates

☐ Identify allowable communication methods with preferences

☐ Identify contact for patient orders

☐ Identify allowable communication methods with preferences

☐ Identify contact for patient order signatures

☐ Identify allowable communication methods with preferences

Expanding Referral Partner Use of Our Services:

☐ Develop messaging

☐ Determine how to disseminate internally and externally

☐ Ask each key account the question, "What is your biggest challenge using (home health, hospice, palliative care, HME) in the current pandemic environment?"

Expanding Referrals from Infrequent Referrers and New Accounts:

☐ Establish parameters for targeting accounts using Market Data

☐ Run report of targets for each sales territory

☐ Send letter and/or email to each of these accounts

☐ Phone follow-up to ask, "Who calls in the referrals for (home health, hospice, palliative care, HME)?"

☐ Speak to that person, deliver value propositions, ask, "What is your biggest challenge using (home health, hospice, palliative care, HME) in the current pandemic environment?"

☐ Collect communication protocol preferences

☐ Ask how best to work together in current environment

☐ Reiterate your value proposition: "My job is to make (home health, hospice, palliative care, HME) referrals easy for you and save you time."

☐ Schedule follow-up and future plans in your CRM calendar