



# Revenue Enhancement: Encouraging More Patients To Benefit From Rehabilitation Services

## Core Challenges

Our Clients had just taken the reins of a leading chain of post-acute care rehabilitation hospitals known for excellent care, dedicated staff, and progressive therapies — but not living up their patient care capacity potential. Overcoming years of internal strife and inertia brought upon the organization by prior management, the staff was also weary of organizational re-alignments and wary of new initiatives. The executive team needed to accelerate revenue, fend off lower-cost, lower-care competitors from capturing patients' recovery plans, and ensure the team had the motivation, tools, and skills needed to make up for lost time—without isolating employees from their heartfelt mission of taking excellent care of patients.

## Initial Analysis

After a 4 week analysis across 25 sample locations, our team isolated several barriers to growth:

*Under-developed patient acquisition process* —With so much scrutiny brought to bear on financial stability, not enough time and resources were dedicated to new patient relationship development opportunities and the practical tools needed for each hospital to know whether or not they were on track.

*Unstructured territory management*—the Directors of Marketing—ultimately responsible for supporting their patient relationship management teams and filling up capacity— had a general sense of where their geographic territory lines were drawn but did not have timely data or heuristics to help them understand patient profiles most likely to use rehabilitation services, the best way to allocate responsibilities across their own team, or alternative ways of generating referrals for their rehabilitation hospital network.

*Inconsistent use of technology*— communication tools, performance reporting, and patient relationship management tools varied across the map. If the tools were even available, utilization varied based on the training and reinforcement offered at the local level. Some New Patient Liaisons had multiple coaching discussions with their Directors about patient visit activity while others had not spoken to their Directors in weeks.

*Missing training elements*— our Clients did an outstanding job making sure the Director + Liaison teams had the latest training on HIPAA, updated service offerings, and new therapies. However, teams were left to their own wits and experiences with training gaps around patient prospecting, call planning, quality meeting coaching, portfolio management, and performance management with numbers rather than anecdotes.



**HEALTHCARE AND  
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## Case Study Synopsis:

- Revenue enhancement (RE) begins by understanding why patients are interested in your products & services and accelerates when the team embraces the best channels to meet patients on their own terms during trying times. Then, RE builds momentum when the team has the tools, work processes, and metrics needed to generate (and see) results. Finally, RE programs become embedded as the go-forward way of building relationships when your team experiences what success feels like using their new system fully-supported by customized training and side-by-side coaching

## Client Profile:

- **\$3+** billion provider of post-acute care services (hospital, outpatient, and home health)
- **500+** locations across 25 states
- **17,000+** employees

## Financial Results:

- **17%** improvement in revenue over baseline

## Operational Results:

- **25%** increase in referrals
- **32%** increase in first-time patients
- **40%** increase in liaison call activities

## Organizational Benefits:

- Customized, co-developed patient relationship management system
- Performance visibility with leading and lagging indicators
- Patient relationship management training and support tools
- Side-by-side revenue enhancement coaching program
- New communication and reporting features leveraging existing tech
- Continuous improvement capabilities



## Collaborative Structure

To move quickly on building near-term revenue growth without sacrificing long-term sustainability, the team was comprised of 45 team members - client executives, client managers and consultants —all hand-selected based on functional needs and deployment timing.

While skills sets varied (specialties included data analytics, relationship sales training, data hierarchy development, one-on-one sales coaching, process consulting, marketing, change management, and project management), all team members were adamantly focused on removing barriers to revenue and installing the tools and supporting work flow processes needed to energize their instrumental Director + Liaison teams out in the regions.

The initial engagement spanned across 6 months with analysis, development, design, 6 regional implementation waves, and 3 waves of continuous improvement coaching. To ensure success and embedded practices, our Client's COO, CFO, and Regional Directors were heavily involved in all phases of the engagement.

## Interesting Additional Considerations

In addition to the internal strife, management changes, sub-par technology adoption, and challenging data flow, our team had to consider and overcome additional issues inherent in the business:

*Motivation for coming to work every day and definition of responsibilities* —The Director + Liaison teams did not want to think of themselves as being engaged in business development roles— even though these teams were the primary engine of growth. The teams considered themselves to be in the business of providing excellent care to patients—not selling. The Director + Liaison teams needed to be appreciated—by their potential patients as well as themselves—as health care professionals and educators rather than as pushy salespeople. Our team needed to incorporate this crucial motivational spark and definition of self within our new patient relationship system, on-going relationship development training, and side-by-side coaching.

*Sensitive services*—The Director + Liaison teams were speaking with hospital patients amongst families gathered around their hospital bedside working on their own path to recovery. Rehabilitation services options must be brought up with tact, respect for the patient's current situation, and empathy for both patient and families who have gone through so much adversity while being asked to make weighty decisions impacting their health.

*Inconsistent practices and communication channels* — Historically, the regions were out of touch with Corporate Headquarters and were left to fend for themselves. Relying upon the strength of the local management team, some areas thrived even in isolation while others were withering away. Directors had no formalized way of sharing what was working with peers in other regions or ask Corporate Headquarters for help if they were struggling.



### Key Statistics:

**100+**  
hospitals and offices  
supported across 6  
US regions

**500**  
clients trained in  
patient relationship  
development

**50**  
custom sales funnel  
management  
dashboards

**25,000+**  
additional  
patients referred to  
rehabilitation services

**5 to 1**  
Return  
On  
Investment



## Customized Revenue Enhancement Solution

To get the revenue curve up on a steeper ascent, the team developed a customized patient relationship management model with much-needed tools and procedures designed to accelerate revenue generation without compromising patient care or morale. The Director + Liaison teams now had a comprehensive Playbook covering all aspects of their improved patient relationship development approach—including territory management planning guide, call planning templates, patient relationship contact management tools, Director coaching guides, and performance dashboards rolling up from all Directors to the COO. The Director + Liaison teams now had a clear window into their team’s trends with leading and lagging indicators. By interpreting every Liaison’s individual patient relationship funnel, the Directors could now make data-backed decisions and focus their support in a personalized fashion. Rather than reacting to the day’s trials, Directors were now able to customize side-by-side coaching to accentuate initial activities (day planning, hospital visits, contact management, call prep), influence onsite Patient + Liaison discussions using their new patient relationship model, and improve patient admissions follow-up across their team. Letting the data decide what’s working and what needs improvement, the Directors could now review their weekly trends with their Regional Directors up to the COO.

While new tools, optimized work flow, and enhanced data visibility were necessary, the most powerful contributor to revenue generation came from patient relationship management training and habitual side-by-side coaching with Director + Liaison teams in the field. All Directors and Liaisons were motivated by patient care. Most teams had nursing backgrounds and a clear understanding of the healthcare aspects of their role—but the vast majority never had proper training to conduct a relationship development call in the sensitive environments they worked in every day. The powerful combination of in-class training, reference guides, one-on-one coaching, and tech-enabled communication with their Directors and sales coaches allowed the teams to see their mission in a comprehensive light and embrace all of their responsibilities. To put a finer point on it, the Director + Liaison teams began to appreciate the fact that patient care and revenue generation go hand-in-hand with each other. The teams were inspired by the fact that the more patients they saw and deeply engaged using their new system, the more patients would receive the benefits of their organization’s high-standard of care and progressive therapies. Regions now had performance visibility, a patient relationship model providing structure without constraining each team members’ inimitable personal touch, shared best practices, and a training & coaching program focused on allowing more patients to get the proper care they deserved.

## Results

Through our collaboration, the Director + Liaison teams were 40% more active in generating referrals, better prepared to discuss service options in a thoughtful manner with patients, and, thus, were able to get 25% more patients admitted. Within 6 months, the organization jumped to an annual run rate of 17% revenue improvement over baseline.



## Our Way of Collaborating :

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Identify  
2-4 meetings at no cost

  - Discussion of issues
  - Alignment around probable causes
  - Framing of analysis scope
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Qualify  
3-6 weeks at cost

  - Qualify opportunities
  - Quantify anticipated results
  - Initial engagement design
  - Key meetings: Launch, Opportunity Review, Solution Review, and Final Framing of analysis scope
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Modify  
4-8 months

  - Final engagement design
  - Execution of engagement design
  - Realization & measurement of results
  - Ownership & sustainability

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