

## REFERRAL MANAGEMENT MADE EASY

*An automated referral system can boost marketing efforts.*

ANDREA ZABINSKI

Optimizing census in all long term care settings these days is not easy—it's a highly competitive market that requires efficient management of referral sources and lead generation. That is why some marketing professionals are turning to a referral management system (RMS) to

collect, automate, and streamline these processes.

While the technology is relatively new to long term care, the concept is not: manage and support the sales and marketing efforts in the most efficient manner in order to optimize census.

In essence, an RMS can track a facil-

ity's full marketing process by collecting and managing all manner of data necessary for targeted marketing efforts and census optimization.

In addition to eliminating the need for Excel spreadsheets, an RMS enables information about referral sources and contact interaction to be entered, stored, and accessed by employees no matter what department they work in.

The features of an RMS can include the generation of trending reports; a calendar for marketing events, such as meetings, in-services, and follow-up calls to referral sources and contacts; and the measurement of productivity, close ratios, conversion rates, and return on investment.

### Customization Key

American Senior Communities (ASC), an Indianapolis-based skilled nursing provider with 46 facilities, is in the process of moving to a full RMS system this year. According to Sherri Davies, ASC marketing manager, an RMS

### WHAT TO LOOK FOR

A number of companies offer RMS solutions, most of which are Web-based and enable users to log in from any computer. This is an important feature to consider when evaluating various RMS solutions. Converting to an RMS also requires a well-devised strategy and operational plan to be put in place before implementing the system.

Following is a list of required features and functionalities that long term care providers should ask for in an RMS:

- A full-featured, customizable solution that meets the company's needs. Don't fall into the trap of purchasing or leasing a system that does not allow the user to change the language of the system to meet the company's needs.
- A user-friendly system for both end users and the management team.
- A referral source and contact communications area that lets the user track marketing notes and attachments by date and time.
- A robust marketing activity calendar with the ability to place notes in all parties' communications area, all from one entry point.
- An organizational marketing and nonmarketing activities calendar for all levels of management review, including the chief executive officer, for accountability of time and quality of events.
- The ability to customize and build trending reports that comport with a company's data requirements.
- The ability to store current census data by each level of care within a facility's continuum. If a company has three lines of services, such as skilled nursing, assisted living, and independent living all on one campus, the RMS should provide access to all lines of business.
- Site security. Ensure that the system is compliant with the Health Insurance Portability and Accountability Act. Opt for one that follows security guidelines and times-out after non-use.
- A separate marketing area within the RMS that also contains features specifically for the sales and marketing team; mixing too much clinical and marketing information can be confusing.
- The ability to build reports tailored to the company's data.

Customization is the key in leasing or purchasing an RMS.

system was necessary for her business because “business intelligence comes from getting into the details, and we can only do this by tracking a wide variety of information.”

Davies notes that a key feature of the system they selected was the ability to customize fields as the company grows. “Some of the information we track isn’t typical, and, thus, the system we have chosen caters to additions and changes to fit our company’s needs,” she says.

Another selling point for Davies was the system’s ability to customize reports. “The RMS report feature allows us to slice and dice the data in the way we need it. In an Excel program, we can only roll up the data with prewritten formulas,” she says.

### Sales, Marketing Management

With an RMS, sales performance is more easily measured because it tracks movement through the pipeline—including closing referral sources and potential clients or patients.

For example, all referral activities and sources, reasons for declines, acceptance rates, and other admissions and intake data can be input and tracked by an RMS.

The system is also designed to evaluate the quality of referral sources and contacts, including payer types such as Medicare, Medicaid, and private pay.

An RMS can also measure a company’s stance in the marketplace by producing data on the number of referrals lost to competitors and the number of referrals that are clinically qualified to match the services of the facility.

It should also give users a way to determine where a company’s marketing efforts stand in comparison to competitors. For example, if the facility is losing referrals to a competitor, the information can be used to adjust a marketing plan and strategies.

### Lead Tracking

Having the ability to track the leads and referral source histories of previous staff was a major factor in Mesquite, Texas-based Christian Care Centers’ decision to convert to an RMS.

“I implemented an RMS because, at the time, I had no pathway for new marketing staff to follow up on leads and referral sources and we had limited ability to track and trend

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#### For More Information

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marketing activity, referral sources, contacts, and referrals,” says Leo Sanders, vice president of ancillary services at Christian Care Centers.

“Having an RMS has allowed me to review marketing activity and referrals in lead management so that I can, in return, target my conversations with each marketer for target-marketing efforts.”

Instead of spending time checking whether data are correct, Davies can now focus her time on what the data are telling her, “which will result in more effective marketing planning,” she says.

An RMS offers providers the opportunity to do away with paper reports and crunching census figures because of the many features it can offer, including up-to-the-second census information, dashboard reporting, and build-a-report capabilities.

Streamlining critical marketing data is essential in a competitive market for tracking, reporting, and capturing a full return on investment in marketing efforts.

“As we look to the future, we expect our RMS to provide us with trending data that impact our marketing efforts, which can lead to recommendations, support, and capabilities to react to them,” says Davies. ■



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