

# Physician Liaison Training and Support



**Providing the Knowledge  
and Skills to Make Your  
Vein Practice Successful**



**Vein Specialists  
of America**  
Business Excellence. Delivered.



# Getting Started with Your Physician Liaison

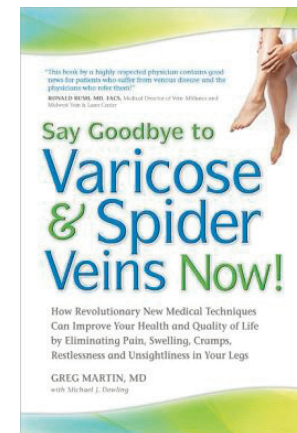
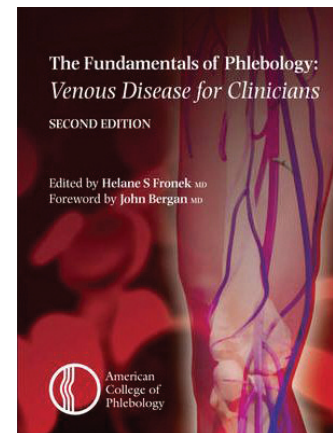


1. **VSA recommends that the physician, office manager and Liaison sit down and set expectations and goals for this new role.** Examples: What is budget? Will the physician be participating in marketing initiatives? Are there time constraints for plans? What are the external marketing plans that are currently in place?
2. **Set communication expectations of your Physician Liaison.** Examples: Do you want to have a weekly meeting with them? Daily e-mail? Whom should they report directly to?
3. **Your Physician Liaison needs business cards.**
4. **Your Liaison needs to fully understand how your office runs:**
  - a. Spend time with your scheduling coordinator and office manager to learn how the front office works. Kahla Grace, VSA's National Liaison Trainer advises making a flow chart of the process your office follows when a new patient calls in. She recommends fully understanding the entire treatment process patients go through from the initial phone call to the end of treatment. Your Liaison should spend time observing all aspects of the patient treatment process.
  - b. Your Physician Liaison needs to spend time with your practice administrator and review insurance coverage as well as pricing.

5. **Your Liaison needs to understand how your office's EMR works.** They need to grasp how to read your EMR system as well as other referral tracking systems that you have in place. Make sure your Liaison has access to your EMR.
6. **Your Liaison needs to understand the process of tracking** where your patients come from, and specifically if they were referred by a provider.
7. **Educate your Liaison on any previous marketing initiatives.**
8. **Make a list of all marketing materials that your office currently has.** Phase II of VSA's Physician Liaison Engagement includes assistance with creating marketing materials. For example, provider referral forms, physician bio sheets, stationery. Printing and replication of these materials are at the expense of the practice.
9. **Does your practice already have a list of providers/offices that are currently referring to your practice?** If you do please provide that list to your Physician Liaison as well your "wish" list of potential targets. Please provide any background on relationships connecting referrals.

10. **The Physician Liaison needs to understand not only how the physician practices medicine** but needs to understand how the physician would like to be represented in the community. Examples: What is the physician's background? Where are you from? Where did you go to medical school and other training? Family interests? Community interests?

11. **For clinical background, VSA recommends that your Physician Liaison is very educated on venous disease.** Please review any clinical resources that you feel are appropriate with your Physician Liaison. VSA suggests that your Liaison read "The Fundamentals of Phlebology: Venous Disease for Clinicians – Second Edition" by American College of Phlebology and "Say Goodbye to Varicose and Spider Veins Now!" by Dr. Greg Martin.



# SECTION 1: VSA On-Site Physician Liaison Training

## Training Outline

1. **Marketing overview**
  - a. materials
  - b. current community events
  - c. publications / advertisements
2. **Review current referring offices and understand referral patterns**
3. **Research potential target offices and create routing schedule**
4. **Cover all aspects of a medical office**
  - a. staff and responsibilities
  - b. decision makers
  - c. office etiquette
  - d. marketing opportunities in offices
    - i. how to schedule lunches / breakfast / meetings, etc.
    - ii. where to place marketing materials
    - iii. how to gain important information about office and physician
  - e. appropriate field time
5. **Review of ConnectMD**
6. **Field time**

## SECTION 2:

# After training is complete: What is next?

## VSA Continuous Management and Training Support

**Liaison Support.** VSA will provide 12 months of continuous management and training support, including weekly or bi-weekly phone sessions with your trainer, covering all aspects of business retention and business development activities.

**Relationship tracking software.**

VSA provides each Physician Liaison with use of our proprietary tracking software, ConnectMD. This fee also includes access to VSA marketing materials as well as VSA's Physician Liaison conference calls.





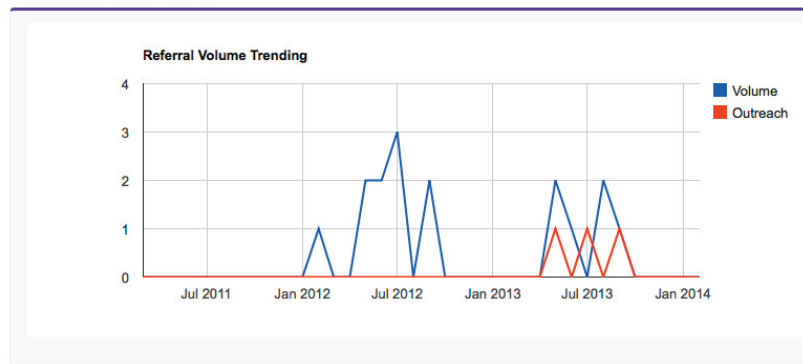
# ConnectMD

ConnectMD is a relationship tracking and activity tracking software developed specifically for Physician Liaisons marketing phlebology practices.

CONNECTMD will allow your Physician Liaison to:

- ✓ View a database of all current and potential referring physicians
- ✓ Create and enter a effective call cycle into a calendar
- ✓ Create Activity Reports of the calls and events they have held with your targeted customers
- ✓ Run Referral Reports to demonstrate results
- ✓ Track ROI of the time and monies that have been spent on referring or potential referring physicians

## Referral and Volume Trending



The screenshot shows the ConnectMD dashboard for user Kari Schoonover. The dashboard includes sections for Recent Items, Messages and Alerts, Custom Links, My Referrals by Code (Vol), My Referrals by Medical Office, My Top 10 Referring Providers, Calendar, and My Tasks.

## Liaison Activity Report

### Metrics

Activity	Target (Monthly)	December	January	February	Qtr. Total	Qtr. Variance	Monthly Variance
Cold Call	4	21	35	0	56	367%	-100%
Communication	0	17	9	5	31	0%	0%
Drop-In	0	34	17	10	61	0%	0%
Event	0	10	8	4	22	0%	0%
PR/Marketing	0	1	2	0	3	0%	0%
Sales Appointment	0	107	81	10	198	0%	0%
Service Appointment	0	26	18	15	59	0%	0%
TOTAL	4	216	170	44	430	3,483%	1,000%

Print Report Download Report

### Completed Activity

Name	Medical Office	Type	Met	Subject	Activity Date	Topic	Post Call Results	Next Step	Collateral	Owner
		Service Appointment		service - office time	2/3/2014	Computer Work; In-Office	catching up on all VMs, planning for week, putting together little packets, routing re-work, TY notes sent from last Thursday			Kahla Grace
		Service Appointment		service - office time	2/3/2014	Conference Calls; Computer Work	curves, training, fishers wellness, camel marathon,			Kahla Grace
		Service Appointment		Meeting with Chrissy	2/3/2014	In-Office	Meeting in Office with Chrissy			Jennifer G.
Harold Nord	Harold A. Nord, MD	Sales Appointment	Staff	Call	2/3/2014	Scheduled Office	Sharon is out of the office. Left 1 Q and let front office know I will be back			Jennifer G.

# Your VSA Physician Liaison Support Team

"The Physician Liaison strategy that the VSA marketing team has created will connect you with your medical community. We will create and customize a strategic plan for your office to grow referrals from your #1 referral base ... other physicians."

— Emily Brown, Director of Physician Relations for VSA



**Emily Brown,  
Director of  
Business  
Development**

Responsible for the overall management of the VSA Physician Liaison team. Emily is dedicated to making sure that your Physician Liaison is doing what it takes to establish and strengthen relationships with your current and targeted referring physicians.

Emily is a former sales representative for Pfizer, the largest pharmaceutical company in the world. While she was with Pfizer, Emily was awarded multiple Summit Awards for sales achievements.

Emily brings tremendous analytical experience necessary to develop business retention and business development strategic plans. Emily has proven to be very successful in providing VSA Physician Liaisons with a clear direction regarding what needs to happen within competitive landscapes to grow physician referrals.



**Kahla Grace,  
National Liaison  
Trainer**

Kahla has eleven years of prior pharmaceutical sales experience with TAP/Takeda

Pharmaceuticals. While with TAP/Takeda, Kahla managed a large 12-city territory, by winning new business and expanding existing accounts with creative ideas and VIP treatment to physicians and their staff.

Prior to joining VSA, Kahla completed an internship within a VSA clinic, learning all of the clinical aspects of venous disease and how various patients would present to us.

Kahla currently is a Liaison for a VSA clinic in Indianapolis and has made a successful contribution to an increase in the practice's overall physician referral numbers.



# Other Services by VSA

**Marketing Services.** A marketing plan for a vein practice is a strategy that is designed to facilitate the achievement of specific growth goals. It is not simply scheduling an occasional free vein screening or patient event. It is an overall strategy that encompasses advertising, media relations / PR, physician referrals, patient referrals, as well as patient events (free screenings, PCP “lunch & learn”, community education seminars, etc.). VSA has the knowledge and experience to design and implement a highly effective marketing campaign that delivers your message and drives new patients to your practice.

**Practice Management.** Whether you are a physician trying to manage your vein practice yourself while taking care of patients or if you have an Office Manager, a management failure can very quickly shift your practice into financial difficulty. Our consultants work with your staff to identify opportunities to control costs, protect income, preserve your patient base and increase physician productivity.

**Revenue Cycle Management.** VSA works with current staff to make sure that each submitted claim is paid at your contracted rates. We seek opportunities to increase your revenues by identifying operational deficiencies, creating action plans to address deficiencies, and then establishing oversight controls to ensure on-going success. Failure to optimize every aspect of claims submission, claims payment, claim denials, and accounts receivable management can have a negative affect on your practice’s revenue.

**Generate Physician Referrals.** From evaluating your current PCP referral network to identifying new or under-utilized sources of new referrals, our focus is gaining new patient referrals for your practice. We will help you inform targeted PCPs on vein procedures and technology provided by your practice, while we emphasize the value of your outcomes and the clinical experience of you and your staff. Every referral physician is different. We will help you uncover the needs and interests of each PCP in an effort to build a referral relationship, create value, and establish the trust in your practice needed to gain lasting referrals.

**Practice Start-Up.** If you are evaluating your options in choosing a consulting firm to help you establish a new vein practice or add a new location, look no further than Vein Specialists of America (VSA). Our name says it all. We have helped physicians all across the country start their new vein practice. VSA is able to coordinate the site selection, space plan design and development of a new or additional practice location, allowing physicians to focus on clinical initiatives.

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## Some additional services offered by VSA are:

- ✓ Practice Operations Check Up
  - ✓ Analysis of Internal Controls & Staffing Efficiencies
  - ✓ Revenue Cycle Payer Analysis
  - ✓ Patient & Referral Physician Satisfaction Surveys
  - ✓ Staff Job Description & Wage Scale Development
  - ✓ Staff Retention & Recruitment Initiatives
  - ✓ Web Site Development
  - ✓ Internet / Print Marketing
  - ✓ Referral Physician Marketing
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