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Using Public Relations and Marketing to Generate Referrals and Sales

Merrily Orsini, MSSW

This article addresses how home health care managers and owners can use marketing and public relations to generate sales leads. It lays out a process: Develop your brand and key messages and then use marketing and public relations tactics, including a cohesive Web site, to reach your target audiences. The key is generating leads through relationship building by identifying referral sources and making certain they know how your company stands out from the crowd. After marketing the firm to the people who are actually making referrals, track the results. The article provides many examples of tips and ideas for generating leads and turning them into sales. A case study presents information relative to how these tips were applied at Kansas City Home Care.

The number one rule to increasing sales in a private duty business is: Do a good job. The second rule is the part many agencies need help with achieving: Tell people about it. Accurately differentiating a home health care business from competitors and getting that information in front of the right people at the right time is essential to growth in a competitive home care marketplace. Strategic, targeted marketing and public relations (PR) tactics, along with a well-constructed Web site, are essential to accomplishing this goal.

The key to standing out from the crowd, getting the referral, or making the sale is making sure the company name comes to mind when a need arises. The three most important ways to make that happen are:

- Generate leads through relationship building
- Identify referral sources
- Market the firm to the people who actually make referrals

FIRST THINGS FIRST: CREATE A COHESIVE BRAND THAT PEOPLE REMEMBER

Many people mistakenly think that what identifies and communicates a brand—logos, company colors, brochures, and uniforms—is the brand. A brand is less tangible. It is what customers, referral sources, and the public think about the company or its services. A brand is an image based on customers' experiences that speaks to potential clients. A strong, positive brand that reinforces the service delivery based on quality and trust will strengthen a home health agency's reputation. Referrals will increase, and the bottom line will grow. After the home health agency has developed its brand, it must have several key messages. Key messages summarize the most important things a client should know about the company. They should explain the company's mission, values, benefits, and service standards while distinguishing the company from the competition.

How Does PR Support Branding Efforts?

Through strategic news placement in a variety of media outlets, PR helps manage and maintain the company's image—the brand—and generates credibility for your business. Unlike marketing, which includes

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advertising and direct mail, PR is usually a longer-term campaign. Advertising gets the agency's messages out through paid placements; PR relies on free or "earned" media to share the story of the business. A story placed in a news outlet or a reference to services is effective because an outside source, unaffiliated with the business, is talking about it.

"Advertising only works if the branding efforts are effective: Publicity provides credentials that create credibility in advertising. Until a new brand has some credentials, you're going to ignore its advertising," write Al and Laura Ries in the introduction of their book *The Fall of Advertising and the Rise of PR* (Ries & Ries, 2002, p. xix).

Generating Leads Through Relationship Building

According to Dr. Philip Kotler (2005), the sales process is sometimes called a sales cycle. Sales is the conversion of demand into orders. There are definite steps in this cycle:

1. Prospecting (lead generation)
2. Cold calling (phone or face-to-face)
3. Initial questioning (can be phone inquiry)
4. Sales meeting (face-to-face)
5. Building rapport (face-to-face or phone)
6. Needs analysis (strategic and tactical questioning, usually with an inquiry form)
7. Presentation of solution (positioning, what a home health care manager or owner can do to solve the problem or meet the need)
8. Closing (signing on a new client or referral source)

Prospecting, or lead generation, is the act and process of actually collecting names and contact information of those people or businesses that would make a good target for services or for referring for services. The more names on this prospecting list, the better the chances of making a sale.

Cold calling is approaching—on the phone or in person—someone you do not know who is a good candidate for using services or making a referral for services. Sometimes a cold call can be made to someone you already know but who is not aware of your business and its capabilities. A sales meeting is best if it is face-to-face so you are establishing credibility and a relationship. It is best not to define this as a sales meeting, and for the home health manager or owner who is leery of sales people, it is best to think of this as a relationship-building meeting.

Building rapport is a natural outgrowth of this process, and it should continue with follow-up phone calls, e-mails, face-to-face meetings, events, or on occasions where common interests are being shared.

Use testimonials and real-life examples to explain the services offered by your home health care company. Give a scenario of a situation, similar to the targets, where the company contributed a positive experience. This is important because home health services are not well understood, and using real-life examples is a powerful way to show how they make a difference.

Closing the sale is getting the contract signed, accepting the check, and starting to work. Just presenting and talking does not bring money in the door. And as Peter Drucker—who is highly regarded in the field of management—was fond of saying: "There is no business until money changes hands."

Build Relationships and Referrals Will Come

In any home health care market, the most fertile ground for referrals will be physicians, nurses, and medical staff at hospitals, nursing homes, and rehab facilities. Home health care owners and managers can generate leads by making lasting connections with hospital discharge planners, nursing case managers, and physicians. In short, the target market for home health services is anyone who has a care need or anyone who works with frail or disabled seniors and can provide referrals. Patients look up to their doctors, nurses, and hospital staff. They respect these professionals, and their opinions can weigh heavily on the patient's decision to select a specific provider.

That said, the best way to get the information about your company to physicians is either to form relationships with their nurses or accompany the patients to their appointments and discuss their care with the doctors. Always send an introductory letter to a patient's physician, introducing the agency as a part of a care team. If a current client is admitted to the hospital, be sure to visit him or her regularly and use the occasion to build relationships with the respective medical staff and insurance company representatives. Offer to provide seminars on some aspect of home health care to the staff, who are required to do a certain number of in-service trainings.

In many instances, geriatric care managers (GCMs) will bring clients to an agency they know well. They also sometimes staff clients themselves through independent or privately hired care providers. Doing a great job of matching client needs with appropriate care and

offering weekend and other challenging coverage times will be just some of the key initiatives to help you maintain an ongoing relationship. Finally, court GCMs by meeting with them personally and taking them to lunch regularly. You can learn a lot from GCMs, so take notes and see if the GCM you are building a rapport with will present your agency for public exposure.

For patients needing follow-up care or treatment following a hospital stay, the process of hospital discharge planning ensues. During that process, you have an additional opportunity to feature your agency. Make sure, first, that your company is on the list of home care companies given out to families. Try to add a blurb, logo, or tagline about your company, if possible. Make sure discharge planners have community resource guides available with your company name, logo, and contact information.

Rehabilitation centers also discharge patients back to their homes, and sometimes those patients are not ready for 100% self-care. To get on their referral lists, get to know the therapists and keep them apprised of your business and how it can assist their patients on discharge or while in therapy.

Joining the Alzheimer's Association or other associations focused on diseases of the aging is another way to spread the word about your agency and its personnel. Join committees, sponsor events, write for the association's newsletter, and present or be an exhibitor at its educational conferences.

With dementia as one of the leading issues faced by the elderly population, specializing in care for persons with dementia can position your agency as a leader in this niche market, and referrals will increase. Training caregivers to work with dementia patients and staffing with patient, kind, and competent professionals will ensure more referrals. Also, for the demented patient, knowing when home care is appropriate and when it is not will allow the agency to be a true resource to the association and those referrals will come. Relationships with quality private-duty agencies will generate leads. You should also keep assisted-living facilities on the radar for sales calls and marketing.

Another factor contributing to whether a home health care manager will have success depends on whether hospitals and nursing homes have infiltrated the market with their own home care programs. In markets where this has happened, home health care managers and owners are at a disadvantage, even though Medicare requires hospitals to present patients with a list of all available resources for home health care. The key referral sources in those markets will be doctors and medical staff who have had a bad

experience with the hospital-owned agency and are seeking alternatives. By simply asking the question, "Are you 100% satisfied with the service your patients are receiving from your hospital's home health agency?" you can start a targeted lead list of somewhat or greatly dissatisfied physicians or medical staff and start the marketing and sales process directly to them.

Going directly to the consumer with a PR and advertising campaign is more likely to be an option in a "closed system." But to do that effectively, the home health agency must have something that makes it stand out—a branded message and image—and must be prepared to make a financial commitment to truly penetrate the market.

WHY PR IS CRITICAL

Because home health is an "at-need" service and the name needs to be "out there" when someone has a need, PR is the key to successfully reaching the consumer and building third-party credibility for a home health agency. Placement of news articles and generating media attention about aging or home care is probably the best and first usage of time and resources. Getting an agency's name out as a resource or expert in care is the most effective way to reach the masses. Do that by finding a spot on a local early morning or afternoon television or radio talk show and position your agency as an expert in caring for the elderly. You can also give talks at senior centers, sponsor events, and place bylined articles in as many different media as possible over a long period.

PR Strategy on the Web

In today's media climate, any PR strategy must include an Internet presence. At the very least, businesses must have a Web site that supports their brand and is easily found when someone is searching for their product or service. A Web presence should complement the PR strategy and branding efforts, and all press releases and news coverage should be featured on the Web site to maximize media attention.

There are a number of resources and experts who can help with the nuts and bolts of hosting a Web site. But the home health care manager or owner should ensure the site includes these basic elements:

- Information on services provided
- Information on the principals of the company
- Images and the inclusion of PR hits to reinforce the established brand and knowledge base

- A form to sign up for informative e-mail newsletters on services and items of interest to potential customers and referral sources

The Web site must support the brand and be designed for maximum usability. If the design is not usable, easy to navigate, and functional, it does not support the brand and may in fact harm sales as potential clients move on to the next site that is easier to use. In his book *Don't Make Me Think: A Common Sense Approach to Web Usability*, Steve Krug (2005) outlines the five most important things to do to make sure users see and understand as much of the site as possible:

- Create a clear visual hierarchy on each page: Categorize and design based on the importance of the content.
- Take advantage of conventions: Don't reinvent the wheel. Feel free to use existing designs and navigational tools that work.
- Break pages up into clearly defined areas: Separate into logical content areas.
- Make it obvious what is clickable: The user should be able to identify the links.
- Minimize "noise": Eliminate unnecessary features, simplify to help the user focus on content.

Secure a Domain Name or Uniform Resource Locator (URL)

Securing a Web site name, which is called a domain name or URL, is the first step to getting on the Web. An example might be www.myhomecarecompany.com. Choosing a URL that contains the company name is essential to reinforcing the brand, in its simplest form. The URL is the name of the site, and it is an international registry that tracks who owns what Web site name and where it is hosted. When the URL is typed into the Internet browser (e.g., Internet Explorer, Netscape, or Firefox), the Web site appears. Also, the Web site name will be included in all marketing material, referenced in articles, and included on a business card, so it is a constant way to get the agency name out. Plus, it allows 24-7 access to information, so it needs to be updated and current.

Choosing a URL is not simply a matter of deciding the name and posting live. The first step is to make sure the name is not currently in use by another site and then register the name to prevent others from using it. The reason for this is obvious: Two sites cannot use the same name. Therefore, a URL must be registered as soon as possible to ensure availability. Domain names can

be purchased at sites such as www.godaddy.com, www.dotster.com, or www.register.com, to name only three. In addition to registering the domain name, these sites also offer packages that include services such as Web hosting and e-mail accounts. Choosing a Web hosting company is essential. The host company provides the place for the Web site to "sit" so it can be found on the Web. Charges for registering a domain vary widely (from \$2.99 to \$35.00 for the same name), and this is an annual charge. Hosting charges are usually monthly or annually, and e-mail is usually a free service with hosting.

There is a lot of freedom in choosing a domain name; however, to make it easier to find the site, the domain name should be intuitive for the business—something that includes the corporate name if possible. Sites that are easiest to remember are simply the company name: www.companyname.com.

URL Considerations

The following guidelines will help ensure a successful URL:

- The URL must use only letters, numbers, or hyphens (-).
- The site cannot begin or end with a hyphen.
- The site must have fewer than 63 characters, not including: .com, .net, or .org. A shorter name will be easier for your clients to remember.
- To ensure a successful name, it should be tested by saying it out loud and even spelling it. If it sounds clear when spoken, it will probably be easy for someone to understand, especially if it includes a hyphen. Writing it down will ensure that it looks good with the words run together as they will be written. It should be pleasing and reinforce the brand.

After a Web site is developed and registered, the next and possibly most important step is to do what it takes to make it visible. With all the Web sites on the Internet, it is not easy to rise to the top when a user is searching. In fact, without search engine optimization (SEO), it is impossible.

SEO

SEO is

the process of increasing the amount of visitors to a Web site by ranking high in the search results of a search engine. The higher a Web site ranks in the

results of a search, the greater the chance that that site will be visited by a user. SEO helps to ensure that a site is accessible to a search engine and improves the chances that the site will be found by the search engine. (www.webopedia.com)

The basic premise of SEO is to construct Web pages so the content is clear to searchers and the pages are easy to navigate. This allows the search engines to easily understand what is on the site, resulting in high rankings or a listing closer to the top of a search results page. Important factors in the SEO process include identifying key words for the site—words that the target audience would use when they query search engines to find products or services. Key words are tantamount to key messages in a company's strategic marketing plan. Once key words are chosen, they are used throughout the Web site. Writing text for a Web site is different than writing text for a brochure. Simply copying the brochure text to a Web site will not be effective as the Web site reader is looking for different things from a Web site than from a brochure, and the search engines are also a factor in the text content.

The next step should be to analyze competitors' Web sites. Competitive research provides a sneak peek into which search engines drive traffic, which search terms produce the best results, and where there may be missed opportunities.

Tracking the Results

Benchmarking business growth and tracking where business is coming from is key—especially for a start-up. Monthly monitoring of referrals, monitoring of who made them, and tracking which cases turned out to be longer term will allow a business to set realistic sales and marketing objectives. Marketing tasks should be divided into passive tasks (e.g., advertising, direct mail, sending birthday cards) and active tasks (e.g., visits, presentations, thank-you and follow-up notes). Objectives need to be set with a budget as to how many tasks are done daily, weekly, and monthly. Use a contact management database to track inquiries by getting their addresses, e-mail addresses, and phone numbers and list them by category: floor nurse, discharge planner, physician, durable medical equipment dealer, and so on. Note when they called and for whom. Follow up on a regular basis to those who have not become referral sources by sending an introductory letter. Send articles of interest or news on the business.

One example of follow-up and success using these approaches is included in the Appendix.

CONCLUSION

The number of options for effective communication may seem overwhelming, but using a wide range means you are more likely to reach a wider audience in a more personal and relevant way. Finding the best way to communicate with a target audience helps ensure that a potential customer will recognize your brand and seek your agency's services. The odds of reaching potential customers increase by integrating marketing and PR efforts with branding and having a well-designed Web site. But the increased number of referrals must be staffed properly and quickly. After that, the key to growth is keeping clients happy and serving them beyond their expectations.

APPENDIX

Case Example 1

Kansas City Home Care Firm uses PR to Raise Profile and Boost Business

Kansas City Home Care (KCHC) founder and president Cheryl Smith saw her and her company's visibility increase after she launched a public awareness campaign last year. With stories in the *New York Times*, *Kansas City Business Journal*, and other key publications, Smith credits the campaign with increasing traffic on the company's Web site and strengthening her side business as a home care industry consultant. It's too early to tell, but Smith is sure the campaign will pay for itself with more customers. Here's how the PR firm she hired did it:

The firm began by pitching stories about Smith and the success of KCHC to business editors, playing on the fact that KCHC offers free resources and information on caregiving and aging for anyone in the community. By positioning KCHC as a free resource and supporter of family caregivers, KCHC was able to secure dozens of news hits and build consumer trust, loyalty, and awareness for the agency.

One major hit in *Kansas City Business Journal*, "Nursing a Niche," resulted in both local and national coverage when it was selected as the business story of the day on bizjournals.com. That translated into exposure in all business journal markets across the United States, showcasing Smith as an expert resource for home care.

Smith's byline also appeared on articles in national business, health care, trade, and family-oriented publications on topics ranging from caring for caregivers to long-term care

insurance. The bylines helped Smith position herself as an industry expert beyond the Kansas City market.

Closer to home, KCHC earned local media coverage by getting the Kansas City mayor to issue a proclamation declaring one day in November local Caregivers Day during National Family Caregivers Month. The campaign resulted in local print news hits, a bylined article by Smith in the *Kansas City Star*, and local television and radio coverage, positioning the agency as the local leader and resource for home care companies and their caregivers.

Smith states in an interview conducted on July 7, 2006,

After 17 years in the private duty home care business I have tried every type of “advertising” there is—TV, radio, direct mail, display ads, etc. So I didn’t hold out much hope that using a public relations firm would benefit my company. Well, I was and still am pleasantly surprised. My PR team constantly amazes me with their creativity, quick response to my requests, the quality of work they produce and the on-going results they obtain. Our company has been highlighted not only locally but also nationally many times this

past year. The team has worked tirelessly to get articles about our company in newspapers, magazines and other print media and to get me on TV and radio talk shows. The results have been beyond my expectations. (personal communication, July 7, 2006)

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