CHAP Growth Solutions

Strategies for Growth and Profitability

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Shane LuQuire

With a remarkable 25-year journey in post-acute care, Shane LuQuire is a seasoned Growth Specialist predominantly rooted in DME, home health, and hospice. He has exhibited profound leadership, notably as a national company's Vice President of Sales. LuQuire's true leadership testament lies in fostering employee recruitment and retention, skill development, and promotion.

Deeply involved in acquisitions and turnarounds, he has consistently demonstrated his capability to transform businesses. Believing in cultivating the right culture for success, LuQuire has crafted leadership training, established pivotal performance metrics, and excels in integrated frequency, territory optimization, and mapping. As a Growth Consultant, he makes strides in strategic tool development, client training, and using data to identify market differentiators.

LuQuire's unique blend of experience, strategic insight, and unwavering dedication positions him as an invaluable asset for organizations on a growth trajectory.

CHAP Growth Solutions

About CHAP Growth Solutions

CHAP's Growth Solutions service provides transformational growth consulting, leveraging industry expertise to help community-based healthcare organizations navigate rapidly changing markets, regulatory demands, and customer expectations.

Our comprehensive approach includes strategic planning, tailored solutions for sales and marketing, and support for continuous, accelerated growth. With a focus on overcoming challenges providers consistently face, CHAP offers evaluation, assessment, implementation, and guidance to ensure ethical and compliant growth.

Proven Tactics to Grow:
Including optimizing territories, using data for differentiation, accountability tactics, leveraging managed care, and scaling your sales team through recruitment, training, and leadership development.

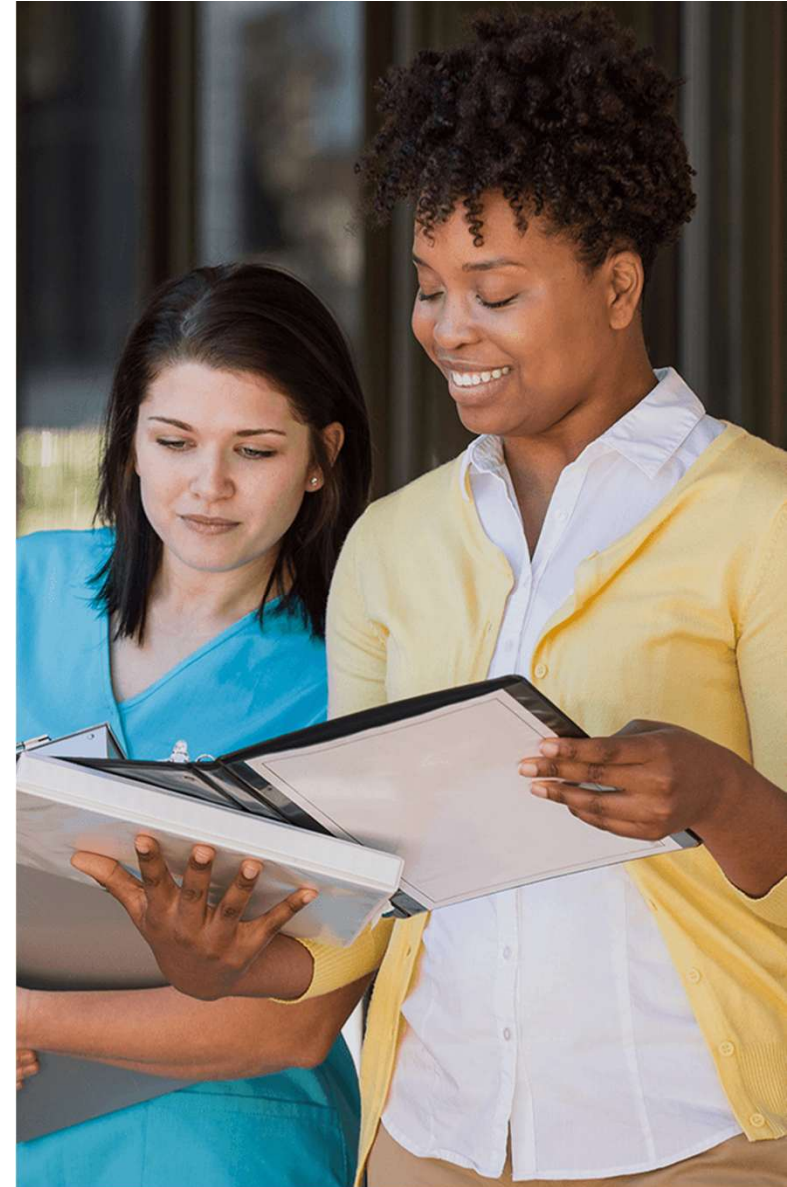# Objectives of this training

Review Common Barriers to Growth

Outline a Winning Formula to Grow Your Agency

Implementation and Execution

Whose Job Is It To Grow?

Everyone

A pie chart titled "Everyone" divided into segments: Sales, Operations, Clinical Team, Intake Dept, Volunteers, Office Staff, Contract Staff.

Biggest Barriers of Growth

Leadership and Direction
Without a strong sales leader or clear value proposition, agencies lack the guidance and differentiation needed to stand out in a competitive market.
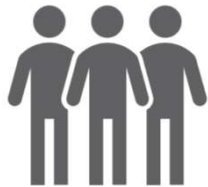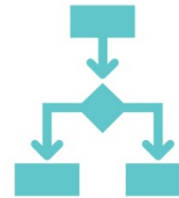
Talent Management
Challenges in identifying, hiring, and retaining salespeople, combined with a lack of formal training and accountability, undermine team performance.

Strategic Planning
The absence of strategic business plans and market data utilization hampers the ability to make informed decisions and adapt to market changes.

Operational Efficiency
Without a weekly cadence of accountability or strategic business planning, agencies struggle with underperformance and inefficiency.

Culture and Engagement
A bad culture leads to turnover, affecting staff morale and the overall performance of the sales team.

Market Intelligence
A failure to effectively use market data and establish differentiators results in an underperforming sales team and unmet staffing needs.

Overcoming Barriers at the Agency level

Complete a SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats

Research your competition

- Google
- Social Media
- cms.gov
- MCR Claims Data
- Local Market Intel
- Publications

Improve on your weaknesses

How can your agency improve?
- Quality
- Care
- Customer Service
- Differentiation

What is holding you back?
- People
- Processes
- Tools
- Leadership

Know your differentiators

These are unique characteristics of your agency that separate you from your competition that every member of your team should know.

- STAR Rating
- Specialty Programs
- Partnerships

Making it easy

06

01

Timely Admissions

GROWTH

Partnerships

05

02

Patient Updates

Customer Service

04

03

Specialty Programs

Overcoming Barriers at the Agency level
Creating a Culture of Growth

Create a culture of Growth

Focus and Measure the Right Activities
- LEAD Measures vs LAG Measures

Make your organizational goals visible to everyone
- Does everyone know your Census and Admission goal?
- Do you have a Daily or Weekly Scoreboard?
- Does everyone on the team understand their role in agency growth?

Managing vs Coaching
- Are you a Manager or a Coach?
- Do you know the difference?
- Managers lead through directives, while coaches prioritize people development and create a safe space for learning and idea-sharing.

Growth Mindset

vs Fixed Mindset

- "I Can If" vs "I Can't Because"

- Self-Coaching

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3 Lead Measures for Growth

To increase referrals, focus on three things: maximizing sales call volume, building customer relationships, and crafting compelling messages that offer solutions to client needs.

Reach

How many Sales Calls are being made each day?

The more calls made the greater opportunity there is for referrals.

It is a numbers game!

Frequency

How Often are we calling on Accounts?

Oftentimes sales reps are not going to accounts with the right frequency.

What is that magic number?

Messaging

What is our message to accounts?

A consultative sales approach that is focused on identifying customer needs and offering a solution to a problem they have.

REACH = Total Sales Calls

Average goals:

- **10-15 per day**
- **50-75 per week**

Define
Be sure to define what a sales call is. Meaningful conversation with a contact that can influence a referral to home health or hospice.

Accountability + Routing
Hold your team accountable by asking for a routing at the beginning of the week that maps out their plan of where they will be going and who they will be talking to. This routing sets up your salesperson to have a very intentional plan for the week. The routing should equate to : "This is where I will spend my time and as a result, my goal is to achieve 5 new referrals this week".

Documentation
CRM/Logging sales calls – documentation is very important to track where time is being spent, who you are talking to, and the outcome as a result. Tracking this data will provide reports that can be used in strategic business planning and coaching sessions with the sales leader.

Data

- List of all accounts called
  - Number of sales calls for the month
  - Number of referrals for the month
  - Number of admits for the month
- List of accounts with no calls – accounts with no visits, assess why.
- List of accounts that are down MoM in admission volume and why.

FREQUENCY – Territory Management

How often are we visiting accounts?

If you have a grading system for an account – you may set up a frequency this way:

- "A" Account – 2-3x/week frequency

- "B" Account – 1-2x/week frequency

- "C" Account – Bi-weekly frequency

- "D" Accounts – 1x/month frequency

Territory Optimization

Right Number of Accounts – too many or too few?

- A manageable territory is critical to success – 40 – 60 accounts is ideal, with a focus on a Top 10-15

Using MCR Claims data to identify high-value accounts

- High volume referrals to HH/HSP
- Refer to more than 1 agency
- Important to ensure that your salesperson's time is spent in the right places, where the opportunities are. "Fishing where the fish are"

Mapping Tools – to ensure the territories make sense geographically and there is no unnecessary crossover with your sales team

MESSAGING

What your customers are hearing

- Do your homework. Pre-call planning with prepared message, value proposition, and possible objections.

- Follow a Consultative Sales Process focusing on relationship building and open-ended discovery questions geared toward the customer's goals.

- Have a system of accountability with monthly or quarterly field coaching rides by a sales leader to assess messaging.

Inquire
Discovering their needs

Close
Directly asking for the logical next step

Connect
Building a foundation of trust

Engage
Customized solutions that solve discovered needs

Navigating apathy, hesitation, and objections
3 types of a "NO"

"Karen"
Lead Measure Success Story

Underperforming Team Members

What is the root cause of underperformance?

Go back to the three lead measures
- Are they making the right number of sales calls?
- Is their territory optimized, with good territory management?

If the sales calls are being made and the territory is optimized, and there are no other external factors, such as staffing, affecting performance, then it can be safe to say that the root cause is messaging.

Messaging is a very common lead measure that is lacking in underperformers
- Did they get the proper onboarding/training to understand their product
- Did they get formal sales training and follow a consultative sales process?
- Do they get routine field rides and coaching calls from a sales leader/coach?

Thank You

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Discovery **Funnel**

Background questions
- Broad questions
- Used to learn about their business, patients, and their current situation

Probing questions
- More narrowed questions
- Used to learn more about what is uncovered.

Confirming questions
- Most narrowed questions
- How does that relate to you, your role, your job?