

# Choosing the Right Partner

## Steps to Picking the Right Physician Relations Advisors



### Endeavor Management

950 Echo Lane  
Suite 200  
Houston, Texas 77024

P + 713.877.8130  
F + 281.598.8895  
[www.endeavormgmt.com](http://www.endeavormgmt.com)

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# Choosing the Right Partner

## Overview

Physician Relations leaders are encumbered by a variety of requests and expectations, many of which are out of scope or not feasible with internal resources. Thus, they frequently find themselves seeking the advisory services of partners and consultants for project-based resources.

Common reasons that physician relations teams work with partners and consultants include:

- Assessing and taking action to improve the referrer experience
- Developing or enhancing the physician liaison/outreach strategy
- Stimulating process and operations improvements to grow referral volumes

Engaging with an external advisory service or consulting firm is an important decision that represents a significant investment of organizational resources – including both staff time and budget funds. The ability to properly identify, review, select and contract with the right vendor is essential to ensuring a successful effort. This white paper will explore how to get started in finding the right partner, and highlight the key steps and criteria for optimizing the selection process.

## Getting Started

The chart below provides an overview of the selection process, which is detailed in subsequent paragraphs.

### 1. Decision Making

Determining the need for external support. Ensure alignment around objectives, project plan, review information gaps and establish project charter.

### 3. Developing the RFP

Defining key objectives and requirements and measures of success for the specific project / initiative

### 5. Contracting

Terms and conditions of the agreement including project plan and deliverables, personnel responsibilities and resource requirements.



### 2. Identifying Potential Partners

Sources can include professional relationships and organizations, conference participation, industry literature and online searches.

### 4. Vendor Review and Selection

Establish criteria and scoring system for evaluating vendor responses to RFP. Process may include onsite presentations as well as site visits / contacts with vendor clients.

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## 1. *Decision making – How do we know we need outside help?*

When deciding if you need the help of an outside partner, first consider your objective and what the role of the partner would be.

- Are you looking for someone to handle a set of very specific tasks, or does your project require a longer-term commitment?
- Are you looking for someone to provide resources (i.e., you know what needs to be done) or someone who can provide expertise you don't have?

Typically, the decision process that leads to engagement with a consulting / advisory services firm is driven by a strategic, customer relations or operational improvement priority. For specific tasks and things with which you are familiar, the process can be relatively straightforward. However, for more complex projects or those with longer timeframes, it is important to consider the collaborative experience - what will it be like working with this partner over a long period of time. The personal working relationships that your team has/will have with the firm's staff become a critical success factor for the project.

Physician relations initiatives that often necessitate outside help include:

- Developing a strategy that will advance your organization's position as a referral center of choice
- Establishing a more strategic and structured approach for physician outreach
- Evolving the Physician Liaison role in a manner that enhances patient centered care coordination
- Refining performance measures and system tools that will advance the overall effectiveness of the physician outreach strategy
- Understanding referring physicians' current attitudes toward the organization, including what would help enhance reputation and grow referrals
- Assessing which factors are most important in referral decision making, and how the organization performs against these factors
- Determining what factors influence US News voting, and how this varies across different geographic areas
- Developing a comprehensive Physician Relationship Management plan that:
  - Ensures alignment of the physician outreach strategy with organizational clinical growth priorities
  - Identifies relevant performance measures and ensures the quality and integrity of supporting data
  - Increases hospital and clinic based employed physician engagement in referring physician relations (such as [facilitating individual physician brand-building](#))
  - Identifies opportunities to improve supporting processes, systems and operations
  - Develops strategies for better utilization of existing technology

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## **2. Identifying potential partners:**

Once a decision has been made to seek outside assistance, the question becomes, “Who is / are the qualified vendors” that can meet the need. You may already know some of the key players in a particular space (such as market research, program development, process / operations improvement, and technology / digital support). But you likely don’t know every firm capable of supporting your needs, or which is the best fit. It is helpful to review firms that attend, present and/or exhibit at relevant trade show conferences, as well as checking with your professional organizations to identify thought leaders on topics of interest.

The next step is determining if each firm is qualified and capable of supporting the identified need, and understanding how each firm differentiates itself from others who provide similar services. The following criteria is a starting point for an initial evaluation or screening of potential partners.

- **Industry Expertise:**
  - Does a vendor’s team include people who have had leadership experience within healthcare systems addressing the same challenges you have today?
  - Can these individuals demonstrate a deep understanding of the healthcare system environment, from the most complex (academic-community partnerships) to most competitive (regionally-based systems)?
  
- **Research – Driven Insights:**
  - Does the vendor use proven research tools and frameworks for brand, experience, culture and operations management across various industries, including healthcare?
  - Can the vendor demonstrate a track record of research innovation that drives strategic decision-making?
  - Are vendor recommendations based not solely on research, but by incorporating actual experience and substantial knowledge of best practices employed by similar organizations?
  
- **Practical Strategies:**
  - Do client references cite clear and actionable recommendations that were based on insight-driven scenario development to arrive at multiple / alternative options?
  - Does the vendor employ consensus-driven decision-making processes to ensure that strategic recommendations are embraced?
  - Is there evidence of vendor-facilitated engagement processes by the vendor to maximize the potential for advocacy of the strategy, both internally and externally?

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## Tips for Success

### **3. *Developing the Proposal or RFP:***

After the initial screening research to identify potential partners, the next step is to develop a proposal. Such proposals can range in complexity, from relatively basic 1-2-page documents, to fully comprehensive Requests for Proposals (RFP).

For any type of proposal, there are essential components that should always be included:

1. Organizational background and description of programmatic services.
2. Key goals, objectives and deliverables for the project – a clearly written statement that describes expectations and objectives through the project. Depending on organizational priorities, it may be relevant to state goals and objectives in priority order.
3. Capabilities and qualifications of the vendor – provides insight into the firm’s background and relevant experience in the industry including client references.
4. Vendor philosophy and approach – how does the firm propose to address key questions and execute the project.
5. Proposal evaluation criteria – an overview of how the submission will be judged, key considerations for selecting the vendor of choice.
6. Contracting process – typically will be provided by legal and supply chain and will include vendor and organization responsibilities, terms and conditions such as cancellation of project, any penalties for non-compliance and payment processes.
7. Instructions for responding to the RFP – for example, due dates for submission, any confidentiality statements and other requirements for vendor responses.

### **4. *Reviewing vendors submissions:***

A solid and well thought out proposal process will result in your ability to narrow the vendor submissions to several “finalists” based on the evaluation criteria set forth in the proposal. The evaluation criteria should be uniformly applied to all vendor submissions. Criteria scoring can be done by assigning a point score, for example: “0” is assigned if the vendor does not meet a certain requirement, where a “5” equates with fully meeting the requirement. Another example would be to score vendor submissions based on the relative degree to which proposal requirements can be met. Thus, the scoring would be delineated as “exceeds”, “meets”, “partially meets” or “does not meet” the stated requirement.

The criteria can and typically does include a subjective assessment that may be based on prior experiences and relationships with a particular firm but should be incorporated in such a manner to be complementary and supportive, but not overly and unfairly biased in the final decision process.

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It may be important to have vendors prepare and conduct on-site presentations based on their proposals, to allow for in-person questions and discussion about the project and to facilitate the relationship building process between organization and vendor. This due diligence step is helpful not only to the healthcare organization, but also represents an opportunity for the vendor to provide additional insight and value into the project that otherwise might not have been possible.

### **5. Contracting:**

The proposal or RFP is usually the basis for developing the contract following a final decision and selection of a vendor. Contracting typically is handled by the Purchasing / Supply Chain team in collaboration with the legal and finance departments.

A well written proposal will facilitate the contracting process for both the healthcare organization and the vendor. The contract is the core document that describes the working relationship between vendor and healthcare organization and includes the project work plan, agreed upon deliverables, and will be utilized from a project management perspective, to ensure that all participants are accountable for their respective roles and responsibilities.

As with any group, it is necessary for the Physician Relations team to have a leader who can keep the process on task, redirect conversation when needed, and emphasize positive interpersonal skills.

Key elements of an effective team that are applicable to the vendor selection process include:

- A common mission for working together
- Agreeing on a plan and direction to achieve goals
- Knowing what needs to be done next, by whom, and by when, to achieve goals – having a documented workplan
- Recognizing how an external advisor can help you conduct more effective physician relations
- Appreciating and utilizing the unique expertise and experience of the physician relations team, the consulting/advisory team and participating internal team members

### **Taking Action**

In conclusion, collaborating with an external partner can arm the physician relations team with insight, strategies and tactics to grow volumes, improve satisfaction and strengthen positioning as a referred referral partner. There are a variety of situations in which an external partner that

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specializes in physician relationship management is beneficial. The ability to properly identify, review, select and contract with the right vendor is essential to ensuring a successful effort.

For more information about engaging and building relationship with referring physicians, please see the following resources:

[Physician Referral Volume Growth](#)

[Embracing your Evolving Role in Referring Physician Engagement](#)

[Facilitating Individual Physician Brand Building](#)

[SMART Physician Relations Benchmarking Tool – Free Online Survey and PDF Report](#)

### **About Endeavor Management**

Endeavor Management is a management consulting firm that leads clients to achieve real value from their strategic transformational initiatives. We serve as a catalyst by providing the energy to maintain the dual perspective of running the business while changing the business through the application of key leadership principles and business strategy.

In 2012, Gelb Consulting became an Endeavor Management Company. Our combined experience (Gelb founded in 1965) offers clients unique capabilities to focus their strategic initiatives with a thorough understanding of customer needs to drive marketing strategies, build trusted brands, deliver exceptional customer experiences and launch new products. Our experienced consultants and analysts use advanced marketing research techniques to identify customer needs and spot high potential market opportunities.

The firm's 40 year heritage has produced a substantial portfolio of proven methodologies, enabling Endeavor consultants to deliver top-tier transformational strategies, operational excellence, organizational change management, leadership development and decision support. Endeavor's deep operational insight and broad industry experience enables our team to quickly understand the dynamics of client companies and markets.

Endeavor strives to collaborate effectively at all levels of the client organization to deliver targeted outcomes and achieve real results. Our collaborative approach also enables clients to build capabilities within their own organizations to sustain enduring relationships.

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