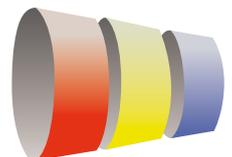


# SALES METRIX works with

## Microsoft Dynamics CRM

for the

# HEALTH CARE INDUSTRY





"For us, Physician Relationship Management begins with Microsoft Dynamics CRM."  
Scott Tobey, Director of Sales, LHC Group

### THE BACKGROUND

Founded in 1994 in the heart of Louisiana, LHC Group, Inc. has grown to employ over 4,000 skilled employees. Today this rapidly growing company services communities throughout the southern United States. LHC Group helps patients needing intermittent medical care stay in their homes while receiving medical attention. Their variety of services include: home health care, hospice, Lifeline, rehabilitation, long-term acute care, private duty nursing, diabetes self-management, and wound care. These services are provided by a trained staff of nurses, physicians, therapists, and aides.

### MICROSOFT DYNAMICS CRM – RELATIONSHIP DRIVEN

The Microsoft Dynamics CRM Health Care Services Solution from SalesMetrix deepened the relationships LHC Group had with physicians by heightening the level of communication. Like most companies in this field, LHC Group has assigned patient care representatives (PCRs) to manage physician relationships and educate physicians on their company's products and services. Patient care representatives (PCRs) work with 100 or more physicians –meeting with as many as 10 per day.

Enabling PCRs to plan their meetings efficiently is critically important to building physician relationships. PCRs want to make sure their visits are accurate, timely, and relevant. PCRs like to meet with physicians shortly after a new case is initiated to thank them for the business and to update them on the admission status of the patient. If they haven't collaborated on a case recently, the PCR might simply want to drop by to make sure everything is OK. If they are driving some distance to meet with one physician, they'll want to visit others in the area at the same time. The PCRs plan their day so they know which physicians they're going to visit; which patients are under their care; and any recent changes to a patient's status. Before the implementation of Microsoft Dynamics CRM, their meeting planning process meant cross-referencing data from multiple systems to make sure they were well prepared for their day.

### FOLLOW THROUGH ON PHYSICIAN'S PRIORITIES

Once LHC Group implemented Microsoft Dynamics™ CRM, the PCRs have been able to have more relevant conversations, based on recent case histories, yielding stronger lines of communication and better results. By linking Microsoft Dynamics™ CRM with Misys Medical Records system, PCRs became able to provide accurate follow-through on the patients' health and progress. LHC Group wants their PCRs to focus on meeting the physician's first priority – the health of their patients. Being able to have relevant, timely conversations instills physician confidence in the company's services.

### ANALYZE AND PRIORITIZE TO BOOST RESULTS

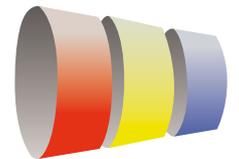
By making patient case records available to PCRs in the CRM system, PCRs are able to use this information to more appropriately schedule their visits with physicians. Using Microsoft Dynamics CRM's reporting features, PCRs are able to analyze new and historical patient case information by physician and benchmark those results across the company - by geography, by specialty, by or whatever other criteria. With Microsoft Dynamics CRM Health Care Services Solution from SalesMetrix, the answers LHC Group need become crystal clear. PCRs can more effectively plan their day and improve their results, meet with the right physicians, at the right time, with the right information.

### RIGHT ON SCHEDULE!

The Microsoft Dynamics CRM Health Care Services Solution from SalesMetrix creates a streamlined way for LHC Group to organize their client and physician scheduling. Routes can be planned based on recent activity, physician specialty, geography or recent referral information. The visit plans guide PCRs throughout their day, reminding them where they need to be and informed with what critical information they need to discuss with the physician. PCRs no longer experience a disconnect between the patient record system and the CRM application, saving their time for building better relationships



## **SALES METRIX, INC.** Powering Business Growth



with the physicians. By integrating physician and case information between the back office case management system and the CRM application, PCRs visit planning efficiency and overall visit effectiveness increased.

### **COMPLIANCE WITH A STARK LAW REALITY**

Named for United States Congressman Pete Stark, the "Stark Law" governs physician referrals and sets limitations on the amount of money companies can spend. Because of this law, LHC Group must document when and what was discussed and track expenses associated with physician visits. Audits are common; and the consequences of non-compliance are severe. Microsoft Dynamics CRM enables LHC to establish good relationships by keeping track of all conversations and needs of each physician – and this feature has the side benefit of keeping LHC Group in compliance with the Stark Law. In addition, expenses that are logged into the system can be totaled against the physician to ensure compliance is met. Once entered, the totals are summed and compared to the allowable amount. In addition, the same expense entries are used to generate employee expense reports so redundant data entry is avoided!

### **THE 3P'S OF SUCCESS – PATIENTS, PHYSICIANS AND PCRs**

The application of CRM for health care service companies is unique because it must accommodate an indirect sales process and sophisticated physician visit scheduling. The solution also had to support the companies need to maintain compliance with laws governing expenses allocated toward physicians and health care providers. With the implementation of Microsoft Dynamics CRM, LHC Group is able to access information more quickly, manage physician visits, accurately track referral history and create stronger relationships. Because of Dynamics CRM, LHC Group spends less time in the back office and more time working on strengthening their physician relationships. CRM has provided PCRs with more time each week to meet with more physicians and make their time spent with those physicians more effective.

Lastly, PCRs have been able to increase their quotas; making LHC Group more successful overall. Being able to easily access physician visit history made double-entry and paper-chasing a thing of the past which saves them time and enables them to be more productive. PCRs can now use the extra time visiting their physician base and helping build strong client relationships. Their new system also gives management the ability to easily track physician counts, visit frequency, and compare them to company benchmarks. This analysis provided them with a superior coaching tool to institute best practices across the PCR team.

## **FACTS & FIGURES**

### **SALES METRIX HEALTH CARE SERVICES SOLUTION**

- Microsoft Dynamics CRM 3.0
- 250 Users
- Integration to Misys
- SQL Reporting Services
- Microsoft SQL 2005
- Microsoft .NET customizations
- SalesMetrix Consulting Services

### **FEATURES FOR THE HEALTH CARE SERVICES INDUSTRY**

- Patient care coordination
- Physician profiling
- Expense tracking
- Stark Law compliance
- Scheduling, routing and planning of physician visits
- Referral tracking with automated follow-up
- Sales performance monitoring

"Prior to CRM, our PCRs were burdened with searching for physician and case information, manual scheduling of visits, double-entry of physician conversations and expenses, and preparing time-consuming reports to management. Now, with the Dynamics CRM system from Microsoft and SalesMetrix, our PCRs spend more time building physician relationships that and instill confidence in our companies capabilities."

Scott Tobey, Director of Sales, LHC Group

## SalesMetrix

### a partner who knows your business needs

#### SALESMETRIX – POWERING BUSINESS GROWTH

Our goal at SalesMetrix is to help businesses gain and sustain competitive advantage, increase revenue and profits, and strengthen customer relationships. Whether the focus is on strategy, systems, or execution, we have the people and technology to deliver tangible results fast and economically.

SalesMetrix specializes in:

- Microsoft CRM implementation, training, and custom development.
- Sales and marketing strategy, planning, methodology, and management.
- Streamlining & automating sales and service operations.
- Internet strategy development and execution.
- Outsourced sales and marketing management and guidance.

Headquartered in Houston, Texas, SalesMetrix employs veteran professionals in field offices across the United States. Our consultants hold advanced degrees in business management and/or information technology and nearly all have held executive level positions with successful growth oriented businesses. From strategic planning, through implementation and deployment, we apply real-world experience, best practices, and a client-centric focus to deliver systems and solutions that power business growth.

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