

# CASE STUDY: STRATEGIC MARKETING PLAN FOR HOME HEALTH



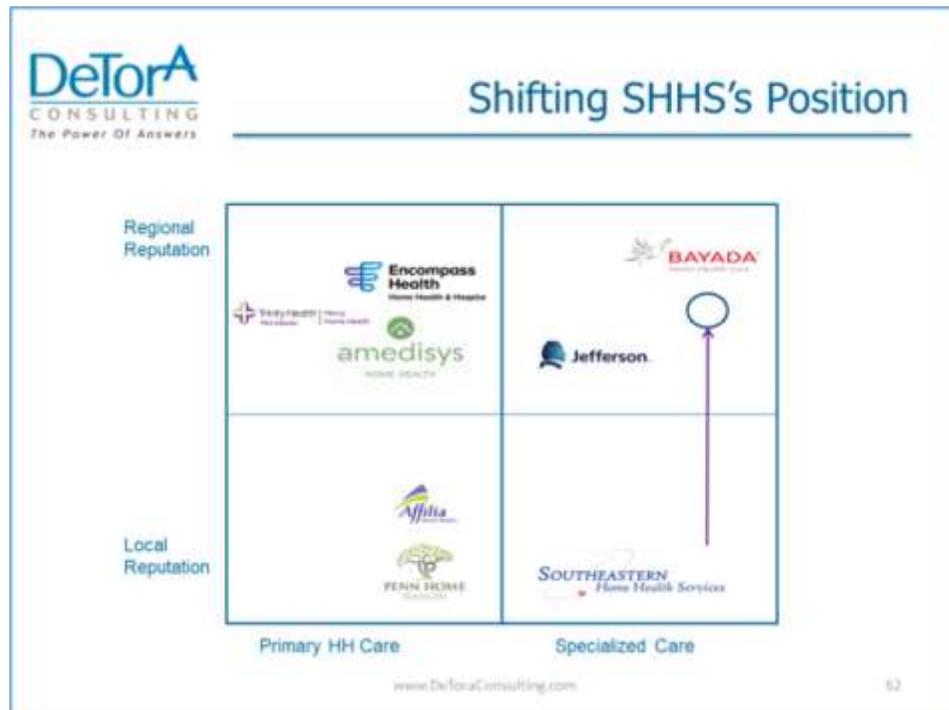
## Organization

By 2019, Southeastern Home Health Services had grown from a single location in suburban Philadelphia to 12 locations across Pennsylvania and Virginia with services encompassing traditional home health, hospice, heart failure disease management, palliative care, wound care, lymphedema, geriatric care, gero-psychiatric, oncology, mobile primary care, and telehealth programs. At that point, Geneva Glen Capital, Southeastern Home Health Services' private equity firm, was eager to build up the business at an expedited trajectory in order to prepare a sale of the organization within the coming two to three years.

The Southeastern Home Health Services executive team hired DeTora Consulting to develop a three-year Strategic Marketing Plan which would include a complete rebranding of name and logo, as well as a digital overhaul.

## Challenge

In order to achieve the success required by Geneva Glen Capital, Southeastern Home Health Services was required to re-position itself as the place to go *first* when consumers need the highest caliber of home health care. Between market share, media, and creative analysis, it was clear Southeastern Home Health Services must move from a highly localized brand to a broader regional presence. It was also critical to highlight Southeastern Home Health Services' specialized expertise, experience, and technology to elevate its brand from the non-skilled competitors who are extremely active with media messaging in the marketplace.



## Approach

The Strategic Marketing Plan (SMP) was insighted from the evaluation of profit & loss statements, market share, physician referral and leakage statistics, out-migration patterns and market growth projections. DeTora Consulting then conducted primary and secondary quantitative and qualitative competitive research. Once the required rebranding and digital strategies were determined and completed, the marketing launch could begin. Southeastern Home Health Services was rebranded Southeastern Health Care at Home (SE).

The SMP outlined an integrated approach in phases. Phase One targeted the primary and secondary markets and includes “mass media marketing” initiatives to achieve SE’s goals, and “niche marketing” initiatives for service lines not explicitly covered in the mass media marketing. The mass media marketing included communications channels that enhanced SE’s market position including a mix of B2C and B2B traditional and digital mediums. The niche marketing included direct-marketing channels such as direct mail, physician initiatives, public relations, and other non-mass media approaches to drive business to designated services.

In Phase Two micro-targets personalized messaging in the primary and secondary markets as well as focused heavy emphasis on the expansion areas within the tertiary markets. Phase Two recommended that SE adopt a reinforcement media strategy in the primary service area (PSA) and directed heavier media toward the secondary and tertiary service areas (SSA and TSA). It was highly recommended the introduction of the Customer Relationship Management (CRM) and Physician Relationship Management (PRM) also include additional Account Executives.

Key messages to physicians varied between hospital-employed physicians, non-employed *referring* physicians, and non-employed *attending* physicians, as well as technical and clinical staff. Market segmentation within a PRM System was recommended. The PRM system is a data warehouse designed to:

- Strengthen physician relations and alignment
- Assess local physician market (demographics, specialty, payer mix, profitability, hospital affiliation, etc.)
- Find splitters and better manage outmigration patterns
- Identify high-value physicians
- Increase profitable revenue
- Improve the coordination of care
- Report the activities and value of Account Executives
- Report physician “issue resolution” for operational and clinical improvements.

The PRM tracking system was integrated with an external physician database with claims data to determine those loyalists, splitters, loyalists to other home health competitors, and new referral sources to the marketplace. Tactics were outlined, tracked, and reported throughout the system, clearly identifying direct-to-physicians return-on-objectives. Tactical efforts were weighted in three segments: Reinforcement, Penetration, and Expansion.

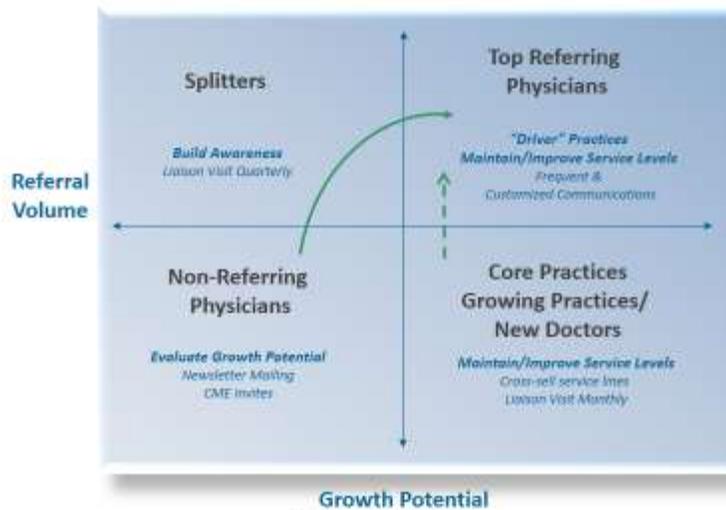
## Provider and Payer Segmentation



Referring Physicians, Nurses, Provider Liaisons, Assisted Living Care Coordinators, Insurance Agents, etc.

20

## Referral Analysis & Outreach Framework



www.DeToraConsulting.com

Phase Three initiatives were all about making SE the national expert in home health with efforts on clinical standard of excellence certificate programs and partnering with the nation's best healthcare organizations to development methodologies for a newly developed *U.S. News & World Report* "Nursing Homes" rankings. The integrated, phased approach outlined in the SMP focused SE's marketing resources to drive ROI through increased volumes of more severe cases within high-margin services that feed downstream revenue.

## Results

Through the SMP business analysis, goals were forecasted as part of the ROI valuation. The plan's execution exceeded 25% volume increase across the board in the first year. Based on this sales and marketing success and SE's efforts to continually form partnerships with prominent acute care providers, in June of 2021 AccentCare announced it has purchased SE from its parent private equity firm Geneva Glen Capital.

Owned by global PE firm Advent International, the Dallas-based AccentCare is a provider of home health, hospice and personal care services, as well as private-duty nursing and care management services. The company has more than 250 locations across 31 states.

## Creative Samples






# SE is ME

Clinical excellence starts with you.  
Join our team today.

- Clinical Field Nurse
- Physical Therapist
- Occupational Therapist



**NOW HIRING. CLICK HERE TO APPLY.**



## Southeastern Cancer Care

Southeastern Home Health Services (SE) provides one of the few true home-based clinical oncology programs. For patients who are appropriate for cancer care specialty services, the SE team works closely with a patient's oncologists and all other physicians to develop care plans, coordinate care, and avoid duplication of services.

### How it Works:

The Oncology Program Coordinator, an Oncology Certified Nurse (OCN®), keeps staff up-to-date on the latest oncology updates. This ensures that SE provides the most current and advanced level of care to assist with Medication Education and Symptom and Side Effect Management.

SE is proud to provide cancer patients with the medical assistance they need combined with the kindness and compassion they deserve in the convenience of their own homes.

Some components of the Cancer Care Services include:

- Disease and Medication Teaching, including Chemotherapy Medications
- Pain and Symptom Management
- Wound and Enterostomal Therapy Care
- Enteral Nutrition Management
- Respiratory Care
- Cancer Fatigue Management
- Supportive Intravenous Therapy, TPN education
- Nutrition Counseling
- Urinary Catheter Care
- Homemaker service
- Respite Care

Referring physicians can review the Guidelines for Referral Therapy for Oncology Patients to determine if their patients can benefit from this program. Patients who choose SE's Cancer Care select clinical expertise, caring empathy, and administrative ease.

Visit us at [www.sehomehealth.com](http://www.sehomehealth.com) or call 866.285.2007.



Southeastern Home Health Services (SE) makes a difference in the lives of patients and caregivers. SE's physician-led services treat a wide spectrum of illnesses using clinical, medical and therapeutic services – all done performed in the patients' homes.

SE employs skilled, compassionate caregivers who treat patients like family. SE's caregivers work with patients and caregivers in manner that is both professional and compassionate.

The combination of physician-led clinical specialties, the use of the latest technologies, and professional, compassionate caregivers help SE to achieve the region's fastest transitions to home and lowest transition rates.

Primary Care, Home Health Care, and Hospice Care are covered services under many insurance providers. Southeastern Home Health Services is contracted with local and national insurance providers.

SE works with patients' insurance providers to bill medical equipment, supplies, and medications delivered through a the patients in-home care plan through the patients' insurance.

Patients and caregivers who have questions regarding insurance coverage can call SE at 866.285.2007.



Providing the Continuum of Care At Home



1501 Grundy's Lane, Suite 100,  
Bristol, PA 19007  
215-826-0900  
[www.sehomehealth.com](http://www.sehomehealth.com)

← → × ssehomehealth.com 24/7 1.866.285.2007 PROVIDER LINK JOB SEARCH SEARCH...

**SE**  
SOUTHEASTERN  
HEALTH CARE AT HOME

ABOUT HOME HEALTH CARE PRIMARY CARE PALLIATIVE CARE HOSPICE CARE CAREERS



Welcome to Southeastern Health Care at Home

PATIENTS & CAREGIVERS

PROVIDERS & PAYORS

JOB SEEKERS

CONTACT US  
We're Here To Help  
1.866.285.2007

← → × ssehomehealth.com

### Clinical Care Across The Spectrum Of Need



CANCER CARE



CARDIAC CARE



HOSPICE CARE



PALLIATIVE



PRIMARY CARE



REHABILITATION