



Cornerstones to a Successful Occupational Health Program

By Mary Alice Ehrlich, Executive Vice President, MED-1

Success is purposeful planning, artful execution, and endless revisions. Success isn't accidental. Luck can play a role, but it's not enough. A successful occupational health program is based on five core competencies. Embracing one and being mediocre with the other four will not result in success. Artfully executing all five core competencies can result in program success.

- Comprehensive Services
- Financial Performance
- Customer Service
- Sales and Marketing
- Clinical Excellence

A review of a few key concepts for each of these competencies is warranted. For many readers, it's a review and a reminder, but I'm hopeful it will spark some reflections and call to action too.

Comprehensive Services

First, remember every occupational health program is different. The service offerings from program to program can vary greatly. True, most occupational health 'clinics' offer drug screens, physicals, and injury care, but do they offer MRO and physical therapy services? Are the hours 8AM-5PM or 24 hours a day? Does the clinic offer mobile services (audio testing, drug screens, physicals), flu shots, and case management?

To achieve this core competency, define the magnitude of your services and stay alert to the potential addition of value added,

revenue-generating services. Do all you can to differentiate your program from the competitors.

Financial Performance

Revenue is a great outcome, and profitability is the goal. A core competency in financial performance is to know your direct and indirect costs for each service and supply. Understand the revenue cycle and monitor routinely, not less than monthly. Be diligent. Things have a way of slipping by those with good intentions. Trending is important. Any monthly report is just that, monthly, but trending data over time provides a great landscape of where you've been. Once you and your team have a grasp on data trending, you can project future financial impact and have some fun with effective cost control initiatives and service development.

To achieve this core competency celebrate metrics. Share not only with leadership but identify data points relevant to staff and share those too. Do all you can to avoid single factor focus (drug screen charges) and monitor supply costs associated with all services.

Customer Service

Customer service, like charity, begins at home. In this case, exercising professional inter office personnel customer service is a great investment. Our staff members need to be consistently delivering customer service and can only do that if they have a full inventory and get resupplied routinely. Generally, we think of customer service as what the patient and the employer require. True, but it's broader than that. Every program has a reputation amongst their work force. Being an employer known for its internal customer service focus requires consistent and fair labor practices, respect and feedback, innovative educational programs,

and leadership. Many areas of the country are facing hiring and retention challenges given the very mobile work force. Employees that feel valued is the first step in fulfilling staffing requirements.

To achieve this core competency, communicate standards of customer service: respect, confidentiality, communications, conduct, and timeliness. These standards are applicable when addressing internal and external customers and can be key in reputation management.

Sales and Marketing

I have always embraced retention as a key component in an effective sales and marketing initiative. A current client is the best sales representative we can have. Understanding the market is easier if you can understand why your current clients are with you. A simple satisfaction survey will give you the facts of why customers are utilizing your services. The facts that delight them and frustrate them will become apparent. Seeking new sales is an art form and worthy of a much longer discussion, but a few basics for consideration: know your differentiations, listen, seek to understand and be willing to be a customized solution, be responsive, avoid being sales focused, and be customer focused.

To achieve this core competency, exercise communications that are unexpected. Follow-up is extremely important. Returning calls and emails is time consuming, but the return is priceless. Offer educational presentations, maybe as simple as coffee with the medical director or explaining drug screen panels. Keep presentations simple. The goal is to be seen as a solution, and the result is new and retained clients.

Clinical Excellence

Clinical excellence is not limited to the 'clinical' staff members. It encompasses the professional team members, clerical and clinical too. Competency, credentialing, skill review, and certifications are all factors in clinical excellence, but consider the clerical (receptionist, billing, referrals) team members and their impact on customer service satisfaction and overall contributions to the patient experience. These individuals are key to every program. Their orientation and productivity and involvement in clinical functions is vital.

To achieve this core competency, include the entire team in communications and process improvement. That doesn't mean everyone is at the table but be open to sharing what you can. If you host a competency update/fair for clinical members, do one for the clerical team too. Emphasize customer service, phone skills, and accurate message capture. The goal is to avoid the non-clinical staff feeling less than valued.

These core competencies form the basis for a successful and valued occupational health program. Building a firm foundation will provide your program with the ability to grow and flourish in a competitive market. <



**Mary Alice
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