

From Vacancy to Victory

How SimiTree turned one client's devastating loss of a VP into a satisfying win for sales and growth



When the Vice President of Business Development for a large, multi-state home health care corporation resigned, SimiTree undertook an executive search for a replacement.

But finding the right candidate takes time, even with a resource as valuable as SimiTree's unrivaled industry niche network of well-qualified and seasoned candidates. The client's need was urgent. A sprawling, multi-state network of sales associates needed immediate direction and oversight.

SimiTree stepped in with transitional leadership, delivering both structure and strategy for some impressive results. The client exceeded sales goals for the year in nearly every region and held a stable bottom line through the pandemic.

CLIENT SITUATION

The CEO on the phone call tried to speak calmly as he described the urgency of the situation. But Growth Solutions Director Melynda Lee, who took the call that day for SimiTree, fully understood all that was at stake for the company.

The Vice President of Business Development for the multi-state corporation had just resigned, leaving no one to direct nearly 50 sales associates across multiple regions, territories, and service lines.

The company needed a new business development leader as soon as possible, one who brought strong, effective leadership in the door on Day 1. There was no time for training or easing into the role. And in the meantime, who was going to direct the sales staff?

Lee delivered reassuring news to the CEO on all fronts:

- SimiTree has the industry's largest pool of niche talent to fill positions 20% faster than other firms.
- SimiTree's Growth Solutions team has the acumen and experience to step in as highly effective transitional leaders, keep the organization's sales and marketing functions moving forward at high performance levels and pave the way for a smooth transition to new leadership.

Perhaps best of all, Lee explained to the CEO that SimiTree could start right away, minimizing the time the client spent with no leadership in place. A proposal was drafted immediately and signed within days, giving the client access to leadership up to 100 hours per month until a permanent leader could be hired.

ABOUT THE CLIENT

The client referenced in this case study is a large and leading provider of home health, including post-operative orthopedic services.

WHAT IS TRANSITIONAL LEADERSHIP?

When SimiTree's Growth Solutions team takes the wheel at an organization, it's a little different from the Interim Management Solution SimiTree also provides. Interim Managers step fully into the roles they fill, usually working on site to fulfill all duties of the position.

SimiTree's Transitional Leadership is specifically oriented to sales, marketing, and growth. It is most often provided in a hybrid model, a combination of on-site and remote leadership. The Growth Solutions team devotes 40 to 100 hours per month to the organization, depending on size and specific needs, to assess, correct, and direct progress, building a solid foundation to help the next leader, when hired, hit the ground running.

EXPERIENCE AND LASER PRECISION

How can limited hours deliver such big results? SimiTree's Growth Solutions team conducts its work with laser focus.

"Our team is made up of experienced consultants and leaders who have held these positions before, and performed very successfully in these roles," Lee said. "We know what needs to be done. We recognize the problems, quickly develop a work plan to implement corrective strategies and focus intently on top strategic initiatives for results."

ADVANTAGES AND A 'SECRET WEAPON'

In addition to having previously filled growth and development leadership roles, the Growth Solutions team brings a thorough understanding of electronic tools, including almost all CRM and EMR platforms.

Perhaps more important, Growth Solutions is fully plugged into the full SimiTree powerhouse of expertise in all areas: clinical, financial, operational, and technological. Questions can be immediately answered by other experts with in-depth knowledge, making short work of problems and confusion, and expediting action.

As an example, SimiTree offers robust Data Analytics with its MAP solution for access to powerful data that can support more accurate projections, deeper market understanding and strategic decision-making.

CASE EVALUATION

An initial assessment of the client's sales operation revealed some striking performance obstacles. The reporting structure was top heavy, with more than 40 team members reporting directly to the VP. There were gaps in local sales leadership throughout the regions served, leaving sales staff without daily coaching and accountability.

Further investigation revealed an important reason for the missing leadership roles in the field as well as the top-heavy reporting system. Few were prepared to step into needed positions. Although the client had some regional sales managers, most had never received adequate leadership training and were not yet ready to be promoted.

With unsupported infrastructure in place and key roles going unfilled, it was clear the client needed leadership development training to better build and manage territories. Overall, the sales staff did not seem to fully grasp the client's value proposition. Team members were unable to articulate to referral sources in meaningful ways how and why the client should play an integral role in the post-acute recovery process.

Growth Solutions identified other issues as well. The corporation did not offer a modernized incentive compensation plan to motivate and reward stronger team performance and retain peak performers. The staff lacked training in how to effectively use the CRM, making errors that limited productivity and business intelligence. Interdepartmental communication and collaboration were weak, lacking adequate flow of information between sales staff, operations and intake.

The client had already begun the process of implementing stronger organizational processes for intake when the VP resigned. SimiTree's Growth Solutions team saw the work being done in intake as a great opportunity to get involved and strengthen the important partnership between sales and intake, and, ultimately, operations.

KEY ISSUES & GOALS

The Growth Solutions team identified several issues hindering optimal sales performance and assisted the client in correcting course with:

- A new top-to-bottom sales infrastructure for more efficient reporting and accountability
- Implementation of a new incentive compensation plan to fuel sales
- Training and leadership development

OUR SOLUTIONS

In considering how to best help the client, the SimiTree Growth Solutions team decided on a three-pronged course of action to boost interim performance and, in doing so, build a solid groundwork for success for the incoming VP who was being recruited and would soon take over.

The team accomplished those goals in three primary ways, addressing structure, strategy, and training.

STRUCTURE: CREATING THE RIGHT TEAM

A top-to-bottom overhaul of the sales infrastructure enabled the client to field a more supportive network in which associates at every level were better supported with management, including communication and encouragement. Field vacancies were addressed, and the reporting chain was re-organized to remove some of the oversight burden from top management, with the goal of freeing the VP for more strategic decision-making.

The result is a more organized sales framework, structured for easier territory management and continued territory building.



Recruiting and Retaining

With new and better structure in place, the Growth Solutions team focused on another important aspect of team building: rewarding and retaining top performers and recruiting top sales talent. In a volatile market plagued by staffing shortages and turnover, this can be particularly challenging.

The client lacked an effective incentive compensation plan, so SimiTree provided the resources to develop a more competitive plan. Our experienced consultants tailored a plan for the client which was designed to add value to the business while creating earning opportunities for employees with unlimited incentives based on achieving tiered growth objectives.

As part of the new focus on competitive recruiting practices, the Growth Solutions team encouraged the client to consider new hires outside the home health and hospice fields. Traditionally, organizations have been resistant to recruiting beyond the home health and hospice fields due to the specialized nature of the market. Those hiring often count on new hires to bring industry contacts with them — an expectation which doesn't always materialize. The Growth Solutions team shows clients that adequate training can overcome knowledge deficits in someone with the right mix of sales technique and attributes to build long-standing relationships with referral sources.

Internal Support Structure

SimiTree consultants looked at more than how the client's sales team was structured. The Growth Solutions team also evaluated the structure in place to support the client's sales team, from how the referral process was handled by intake to the electronic platforms used for sales tracking and management.

“You can teach someone about home health and hospice, but it’s much harder to teach someone how to build relationships based on trust and confidence.”

— Melynda Lee, Growth Solutions Director

The client's referral process was cumbersome, which is not unusual for a heavily regulated field in which reimbursement hinges on meeting so many requirements and attention must be paid to so many details. While the regulatory burden can't be shortchanged, streamlining the referral process to make it easier for referral sources is always a smart idea. Organizations that are the easiest to work with, including a pleasant intake staff and faster processing, get and keep business.

An effective CRM is an important asset. Although the client had in place an adequate CRM, it was not being used effectively, as there were gaps in staff understanding of its full capabilities. The Growth Solutions team worked with staff to enable leveraging existing CRM tools, improving understanding and efficient use of the solution's mobile application.

STRATEGY: SETTING A PROFITABLE MARKET COURSE

As the industry leader in data analytics and benchmarking, SimiTree helps clients pinpoint specific market opportunities, targeting areas for best use of resources and providing actionable recommendations.

Claims data showed that in many markets, up to 40% of patients were discharged from hospitals without receiving post-acute care. Combined with a substantial body of evidence supporting the critical role of post-acute services in recovery, this revealed significant untapped opportunities throughout the client's market. The Growth Solutions team worked with the client to identify and highlight those opportunities, including areas overlooked or underserved by competitors. An additional, often-overlooked source of referrals is the pre-acute care market. By working in tandem with physicians, home health providers are in many cases able to prevent hospitalizations and control health care costs. SimiTree consultants highlight and explain these additional market opportunities, building enthusiasm for expansion of sales efforts.

The focus for SimiTree consultants is always on steady and sustainable growth, in which sales teams work closely with clinical operations to make certain increasing volume can be adequately handled at each step of development.

Improved Messaging

While much of the specific market strategy for the client would be determined by the incoming VP, it was important for the sales staff to be able to identify higher-value referrals and pursue them with confidence, articulating to those referral sources the value proposition of the client.

SimiTree works closely with clients to establish a strong role within their communities, becoming a recognizable asset through strategic and well-crafted messaging. The Growth Solutions team worked with sales staff in coaching sessions designed to help them better recognize and express the value the client could bring to both the referral source and the patient.

POWERFUL MESSAGING ESTABLISHES VALUE

The Growth Solutions team helps clients create well-crafted and powerful messaging that establishes agency identity in the community and highlights the value it brings to the health care continuum.

TRAINING: BOOSTING AND BUILDING LEADERS

EQUIPPING THE STAFF

Coaching, mentoring and brainstorming sessions fully equip the staff with knowledge, resources, and messaging to confidently articulate the value proposition.

SimiTree consultants focus on strengthening performance today while building leadership for tomorrow.

Initial steps for this client included equipping the team with essential sales training, with a focus on staff buy-in and increased confidence. Growth Solutions deployed an arsenal of best sales practices, improvements and tried-and-true processes designed to improve confidence, increase efficiency, and boost performance — all based

on uncovering customer needs and articulating the value proposition as a solution. Coaching, mentoring, and brainstorming sessions equipped the staff with the knowledge, resources, and messaging so that they could confidently explain to physicians, discharge planners, social workers and other medical staff exactly how the client could help them achieve their goals.

The Growth Solutions team also offered recommendations for ongoing training to build leaders from within, maintaining a leadership culture that promotes growth and retention.

FINDING THE RIGHT CANDIDATE

While SimiTree's Growth Solutions team was supporting the client's sales efforts with new structure, strategy and training, the Talent Solutions team was searching for the right candidate to take the helm.

SimiTree delivers what other healthcare recruiting and placement firms can't: an exclusive focus on leadership needed for the home care, hospice and applied behavioral analysis fields. Our extensive network of qualified applicants is the largest niche talent pool in the industry, and it enables us to reduce time to hire by 20% when compared to our industry peers. To date, we have placed more than 2,500 executives in our niche.

FULL TRANSITIONAL SUPPORT

When the right fit was found for the VP position, the Growth Solutions team turned its attention to providing a supportive transition. SimiTree devoted 30 days to an orientation program designed to fully acclimate the new leader to the structure and strategy already in place, assisting the new VP's implementation of growth goals designed to build on that foundation. With the new hire, SimiTree's role shifted from transitional leadership to support, and the Growth Solutions team deployed full resources to ensure the success of the new leader.

THE RESULTS

The enterprise continues to exceed financial goals, supported by its new sales leadership structure, enhanced technology, collaboration with operations, and a data-driven growth strategy.

With a fully re-energized sales and marketing staff, the client is reaping the benefits of higher confidence levels, enthusiasm, and improved collaboration between departments.

