**RETAIN & Providers: Communications Strategies for Engaging Health Care Audiences in Your Demonstration Project**

# Highlights from the RETAIN TA Community of Practice Dialogue – October 4, 2019

# Overview

On October 4, 2019, the RETAIN Technical Assistance (TA) team hosted a live Community of Practice (CoP) in its “Communications Exchange” series, which is designed tohelp RETAIN awardees maximize the potential of their state demonstration projects through effective communication.

The session was titled **“RETAIN & Providers: Communications Strategies for Engaging Health Care Audiences in Your Demonstration Project.”** The session’s guest facilitator was Shirley Kron, Employer Liaison and Division Director for the Catholic Health Initiatives (CHI) Medical Group in Kentucky and member of the Kentucky RETAIN team. Greta Menard of Concepts, Inc. served as moderator.

This document captures key content from the presentation as well as highlights from the information-sharing dialogue.

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# Understanding the Health Care Audience

The presenter reviewed a key rule of thumb for reaching target audiences. No matter what your “ask” or message is, the common thread in all of them should be “WII-FM”—the so called “radio station” that all your target audiences are tuned into. That acronym stands for “What’s In It For Me?” And to catch a target audience’s “frequency,” you need to present the *benefits* of the RETAIN program to that particular audience.

With regard to RETAIN, your ability to win over a health care provider often hinges on trust and credibility. The presentation emphasized the following exemplary practices:

* Build rapport with your health care targets/stakeholders.
* Leverage your relationships and connections to reach them and build your credibility.
* Be an “information partner” to your health care targets.
* Be brief, honest, and relevant during your interactions. (Providers’ time is limited, so be prepared to get your message across swiftly and succinctly.)

The presenter also reminded participants to **keep patients central to the conversation**. Health care providers work in their field in order to help people, so your messaging should emphasize how RETAIN can help them better serve their patients.

# The Four W’s

When planning outreach to health care audiences, the presenter also suggested considering “four W’s”:

* **WHY are they important to RETAIN?** They can refer patients or influence decision makers to enroll patients in your project.
* **WHERE can I find health care partners and participants?** Hospitals, physician offices, clinics, rehab centers, outpatient therapy clinics, nursing homes, and more.
* **WHEN should I approach them?** Given their busy schedules, timing can be challenging. Health care providers tend to be mobile, so it can be wise to approach them in the places where they are seeing patients.
* **WHO?**Targets can include physicians, nurses, leadership, mid-levels, medical assistants, physical therapists, case managers, and others who work in the specialties most relevant to your RETAIN project.

# Learning Is Success—The “How”

The presentation identified a number of ways to engage health care targets successfully.

* **Enlist “champions” to speak and reinforce the message.** This means engaging credible, trustworthy health care influencers to sing RETAIN’s praises among their peers, introduce you to new contacts, etc.
* **Be responsive and do your homework.** Research your target’s specialties and focus areas before meeting with them, and adjust and adapt your messaging based on each one’s WII-FMs and needs.
* **Build your referral into an existing process.** Providers won’t want to participate in RETAIN if it requires extra work on their part. Your goal should be to lighten their load and help them serve their patients better, so develop your project’s referral process with their existing administrative and patient-care workflows in mind.
* **Consider FAQs.** Given the limited time you will have with providers, be sure to answer their frequently asked questions about RETAIN quickly and succinctly, and provide them with a leave-behind fact sheet that answers the basics. Key questions to answer include:
  + What is RETAIN?
  + How does the program work?
  + What role would I play in the project?
  + How can RETAIN help me serve my patients better—and make my job easier?
  + How do I make a referral?

# What to Say to Health Care Providers & How to Say It

## Key RETAIN Messaging to Emphasize with Health Care Audiences

During the CoP discussion, participants agreed that health care messaging needs to lead with the *benefits* that RETAIN will offer providers and their patients. Examples of such messages include the following:

* We are currently seeking patients and health care providers to participate in the RETAIN project, which is designed to **help people stay at or return to work following an illness or injury.**
* Our approach is to work collaboratively with injured and ill patients, their employers, and health care providers like you in order to **help people get better and back to work as soon as medically feasible.**
* **RETAIN serves as a trusted partner to health care providers** who want to see their patients recover and succeed by returning to the workforce.
* We’re here to **complement your treatment plan**, not compete with it. In fact, we do not provide medical services at all. Rather, we aim to **save you time and effort** by taking on the management of your patients’ stay-at-work/return-to-work (SAW/RTW) plans so that you can concentrate on what you do best—patient care.
* **There is no monetary cost for you to participate.** The research study is funded by the Federal Government as a way to understand more about how we can better support American workers after injury or illness.
* You play an important role in RETAIN. As you know, SAW/RTW strategies lead to faster, better health care outcomes—**but the seeds of RTW goals are often planted in the office of a provider.**

## Communications and Outreach Tactics Targeting Health Care Providers

Participants in the CoP mentioned a number of strategies and tactics that they are using, or plan to use, to educate and engage health care audiences. Examples cited by participants and the presenter include the following:

* **Make connections and build relationships.** Participants agreed that the “champion” approach works well. These allies can introduce you to new targets and provide tips on reaching them effectively.
* **Be flexible and accessible to health care participants.** Several individuals mentioned the importance of providing multiple ways for providers to reach you with referrals or questions about RETAIN. Some providers prefer to communicate via email and phone, while many prefer text messaging.
* **Create powerful leave-behind documents.** Participants agreed on the importance of direct, succinct RETAIN fact sheets and brochures, and they liked the FAQ approach as a way to answer basic questions. With regard to materials, the following practices were shared:
  + Provide an FAQ fact sheet and a referral form with contact phone number(s).
  + Less is more, and shorter is better. It is wiser to list just a few quality resources versus lengthy lists they won’t bother reading.
  + Hard copy materials tend to be best, however posting key information to a website is a helpful added step. (Providers on the call said that a hard copy hand-out will always be their first go-to reference.)
  + Mention in your materials when RTW coordinators are in the office and available to talk.
* **Customize your messages and materials based on the target audience.** Discussion centered on the need to target different types of health care providers with nuanced messaging. For instance, some types of providers are more educated about SAW/RTW issues, while others are well versed and will not need as much spelled out for them.
* **Be nimble and responsive.** This allows you to test and fine tune different approaches based on strategies that work.
* **Collaborate with providers on message development.** Consider co-creating materials with your health care partners. Physicians are often thinking from the patient’s perspective; they know what questions patients will have, which can be helpful.
* **Seize opportunities to educate.** Even if providers are not able to refer patients, there is value in simply educating them about the importance of SAW/RTW strategies. (Discussion touched on the need to apply the CoP’s messaging and communication best practices to the training modules that several states are developing for physicians.)

To explore these topics further, or to receive one-on-one assistance with communications-related RETAIN tasks, please contact your RETAIN TA liaison or email [RETAINTA@air.org](mailto:RETAINTA@air.org).