

Name: _____

Phone: _____

Health Care Section Forum

Leverage Client Feedback for Continuous Improvement

Chris Franklin
Executive Vice President
LocumTenens.com
locumtenens.com

When Short Supply Meets Rapid Growth: The Shift in Health Care Staffing

Bonnie Britton
Vice President, Sales
Staff Care Inc.
staffcare.com

Wednesday, Oct. 28
3:45–5 p.m.



ASA
American Staffing Association

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ASAP PSC CSC CHP
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AGENDA

- The Locum Tenens Market
 - Demand
 - Supply
- Engaging Customers
 - Why It's Important
 - How We Do It
- LocumTenens.com Feedback Process
 - How It Started
 - How It Has Evolved
 - How We Use It
- Questions

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About LocumTenens.com

- Since 1995, LocumTenens.com has been a leader in supplemental physician and advanced practice staffing.
- We are part of the Jackson Healthcare family of companies.
- Each of our divisions offer in-depth knowledge of one of the high-demand medical specialties in which we work.
- LocumTenens.com operates the largest free online job board for the locum tenens industry.
- Our proprietary database stores information on thousands of job-seeking physicians, CRNAs, NPs and PAs.
- Founder of MedicalMissions.org, one of the web's top sites that helps medical volunteers and mission-centered organizations connect.



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The Locum Tenens Market

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Demand is Increasing

What is driving the high demand for healthcare in the U.S.?

More Access

The Affordable Care Act added 17-18 million people to insurance rolls, including 9 million on expanded Medicaid¹

Aging Population

- **78 million:** number of U.S. baby boomers
- **1** baby boomer turns **65** every **8** seconds

Unhealthy Population

- **\$190 billion/year:** obesity-related treatment spending now exceeds spending on smoking-related illnesses³
- **5%** of the U.S. population = **49%** of healthcare spending²

1. Forbes
2. AHAQ, "The High Concentration of U.S. Health Care Expenditures" Reuters Forbes.
3. "Obesity Now Costs Americans More in Healthcare Spending than Smoking"

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Supply is Finite

- As of 2013, there were 767,000 medical doctors in the U.S.
- Research shows that most graduating physicians are choosing to be employed and live in more urban areas
 - 20% of the U.S. population lives in rural areas, but only 9% of physicians
 - The Association for Staff Physician recruiters last year reported that only 58% of full-time searches were filled by year end.

By 2025,
the AAMC
estimates that
there will be a
shortage of 90,000
physicians

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Locum Tenens Offers Solutions

- The locum tenens industry has a 30-year history of helping provide access to healthcare professionals where they are needed, when they are needed.
 - The National Association of Locum Tenens Organizations (NALTO) lists more than 72 firms in its membership.
 - Staffing Industry Analysts estimates the locum tenens industry market size at \$2.5 billion in 2014.
- For clients: Locum tenens professionals provide staffing flexibility to healthcare providers
- For talent: Locum tenens work provides the work-life balance and independence that healthcare professionals want

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Engaging Customers

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Customer Engagement

How Engaged Are Your Customers?

GALLUP

FULLY ENGAGED customers are strongly emotionally attached and attitudinally loyal. They'll go out of their way to locate a favored product or service, and they won't accept substitutes. True brand ambassadors, they are your most valuable and profitable customers.

ENGAGED customers are emotionally attached, but not strongly loyal. They do like your product or service, but they can be tempted to switch by a more convenient, more attractive, or lower priced offer.

NOT ENGAGED customers have a "take it or leave it" attitude toward your product or service. They're disconnected emotionally and are attitudinally neutral toward your brand and what you're selling.

ACTIVELY ENGAGED customers are completely detached from your company and its products and services. They will readily switch or – if switching is difficult or impossible – may become virulently antagonistic toward your company or brand. Either way, they're always eager to tell others exactly how they feel.

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Our Service Promise

We operate under the following guiding principles in order to deliver the best customer experience possible and to demonstrate our obsessive dedication to our customers.

Accessibility and Responsiveness
Our associates are trained to respond quickly and keep you informed as things change.

- What this means to you: You should be able to reach our associates when you need them. If we are not available, expect a timely return call or email.

Expertise

Our associates know this business - because they've been doing this for a long time. In fact, LocumTenens.com has one of the highest average employee retention rates in the business.

- What this means to you: When you call LocumTenens.com, you will talk to someone who knows the ins and the outs of your particular specialty. You can expect to build a long-lasting business relationship with a tenured professional.

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Our Service Promise

Respect | Courtesy | Empathy | Transparency

Every associate at LocumTenens.com, from our Interns to our President, is committed to delivering great customer service. Nothing is more important to us than treating our customers well -- our customers are the reason we are in business -- we understand this.

- What this means to you: We understand that your time is valuable. Your contact will listen to you and invest whatever time is necessary to learn about what you need so that we can deliver results. When working with LocumTenens.com, expect honesty, fairness and open communication. We do what we say we're going to do.

Innovation

We know your needs and priorities are constantly changing and our culture is one that allows us to change course and make quick decisions as needed to support your needs.

- What this means to you: When you work with LocumTenens.com you can expect your contact to focus on your needs. When issues or problems arise, expect quick resolution. When you are in a bind, expect new and innovative solutions - not a one-size-fits-all approach.

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The LocumTenens.com Process

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Evolution of the Process

No formal process prior to 2007

2007
Began phone surveys using questions developed by leadership team

2012
Process moved to customized, automated e-mails no longer coming from a single person

Now
Have created formulas to prevent over surveying
Annual client satisfaction survey in addition to post-engagement surveys
Dissatisfied responses are automatically escalated to team VP

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Where Are We Now?

Using the universally-accepted Net Promoter Score (NPS) is a very clear way to measure the engagement of our clients and talent.

NPS = % 😊 - % ☹️

Source: Medallia Inc. All rights reserved.

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NPS Benchmarks by Industry

Industry	Min	Q1	Median	Q3	Max
Retail Stores	25	35	45	55	75
Financial Services	25	35	45	55	75
Online Services	25	35	45	55	75
Technology & Electronics	25	35	45	55	75
Insurance	25	35	45	55	75
Travel & Hospitality	0	10	20	30	40
Telecommunications	-25	-15	-5	5	15

Source: Medallia Inc. All rights reserved. All figures represent Net Promoter Score and represent a comparison against the Best & Company Inc. and the Medallia.

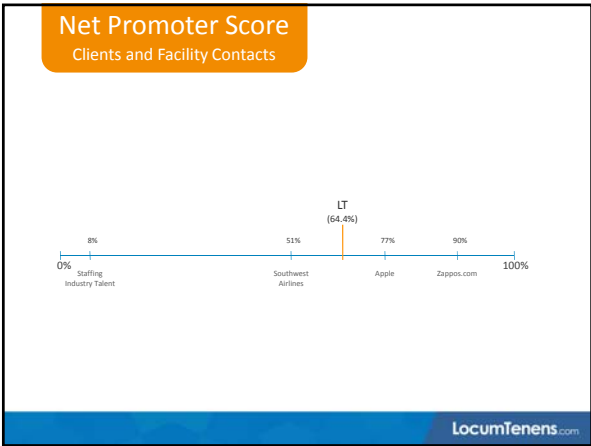
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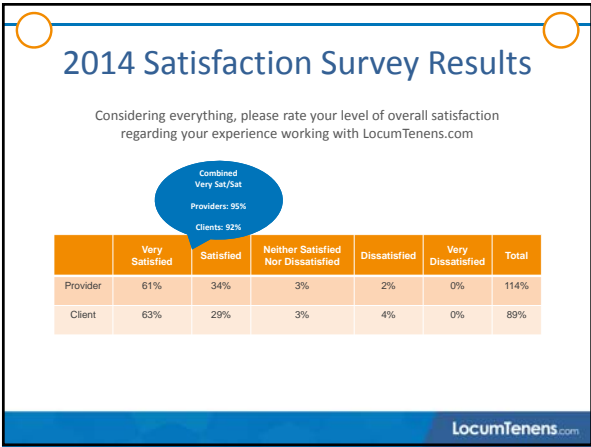
Net Promoter Score

Physicians and CRNAs

Entity	Score
Staffing Industry Talent	33%
Southwest Airlines	51%
Apple	77%
Zappos.com	90%
LT (LocumTenens)	72.8%

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Building a WOW Culture

- Top Box Scores
 - Considering everything, rate your overall satisfaction with LocumTenens.com on this assignment
 - Specific questions about credentialing, travel, account executives, the provider, etc.
 - Specific questions about knowledge level and responsiveness
 - Top Box score are people who selected "very satisfied"
 - "Satisfied" is also shared
 - Goal is to move satisfied to very satisfied
 - Rolling average over 4 quarters

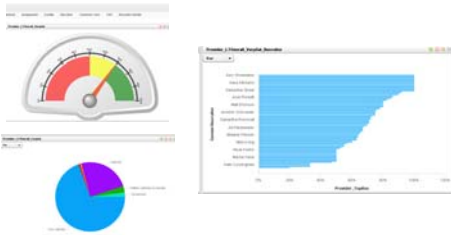
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Other Feedback Sources



Reporting

Feedback responses are available on dashboard down to the individual level.



Quality

- In addition to service, we ask about the quality of the healthcare professionals we place. We report this annually to clients.
- What we measure:
 - Clinical fit
 - Staff interaction
 - Overall satisfaction



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Future Goals

- Formally closing the feedback loop
- Asking the right person the right questions (medical director vs. physician recruiter)

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Results

- Tremendous growth
- Low turnover of employees
- Great loyalty from clients and talent
- Industry recognition due to high NPS scores




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Questions?

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Thank you for attending this
Staffing World 2015 Section Forum



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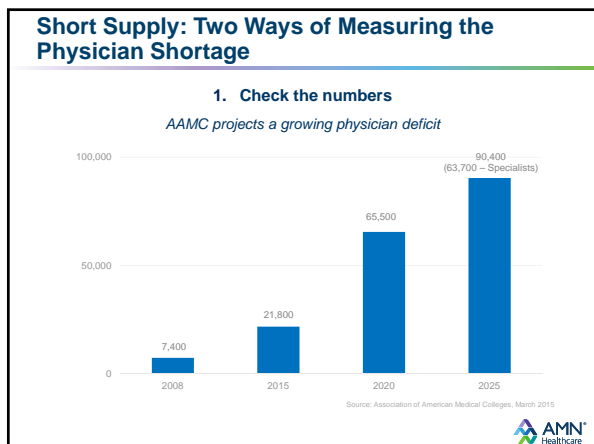
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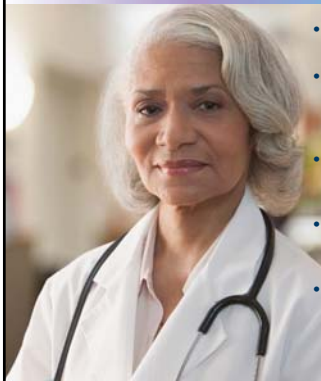
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Other Factors



- **The Affordable Care Act:** 16.4 million people now insured
- **More population growth:** 45 million new Americans from 2000 – 2020 (roughly the population of Ukraine)
- **Provider aging:** 55% of nurses are 50 or older; 28% of physicians are 60 or older
- **Medical advances:** Over 10,000 prescription drugs, organ transplants, Botox, and Bariatrics
- **Our own success:** 18 million cancer survivors by 2020



What Do Consumers Seek in an Era of Provider Shortages?

Access

The new mantra:
*“Be everywhere,
all the time”*



The Rise of Convenient Care



- Walk in clinic:**
Walk in and be seen by a healthcare professional without an appointment
- Retail clinic
 - Urgent care
 - Pharmacies
 - Emergency Room
 - Employer clinics
 - Occupational health clinics



Retail Clinics and Pharmacies

Retail Clinics	Typical Staff	Services
	<ul style="list-style-type: none"> Nurse practitioners Physician assistants Pharmacists Pharmacy technicians 	<ul style="list-style-type: none"> Non-emergent injuries and illness Flu and cold symptoms, strep throat Minor cuts, scrapes and skin conditions <p>Preventative Health Services:</p> <ul style="list-style-type: none"> Immunizations Annual physicals and health screenings <p>Expanding Services:</p> <ul style="list-style-type: none"> Chronic disease management Prescribed medications – adjacent pharmacies

Slightly less advanced medical procedures than urgent care

Urgent Care Centers

Urgent Care	Typical Staff	Services
	<ul style="list-style-type: none"> At least one medical doctor Nurse practitioners Physician assistants Medical assistants Laboratory Imaging Physical therapists RNs (MS, PED) Pharmacists 	<ul style="list-style-type: none"> Non-emergent injuries and illness Falls, sprains, broken bones Preventative health services Laboratory services Imaging

Slightly more advanced than a retail clinic, fill the gap between primary care doctor and ER

U.S. Market Size

<p>1,658 Retail Clinics</p>	<p>As of June 2014, five organizations operated 90% of retail clinics</p> <p>CVS, Walgreens, Kroger, Target, and Wal-Mart</p>
<p>9,900 Urgent Care Centers</p>	<p>Heavily fragmented market</p> <p>Large urgent care chains are only 2.2% of market</p>

Sources: Merchant Medicine, Rand Health "Retail Clinics Play Growing Role in Health Care Marketplace", Urgent Care Association of America

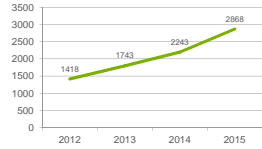
Retail Clinic Growth

Retail Clinics Growth Expectations

20-25% annually

Between August 2013 and 2015, the number of retail clinics was predicted to grow 20% to 25% annually, doubling from 1,418 to 2,868

U.S. Retail Health Clinics to Double by 2015



Source: Ascendare, Aug 2013 "Retail Medical Clinics: From Fix to Franchise"

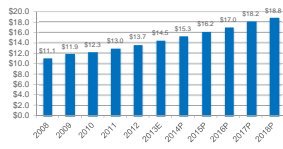


Urgent Care Growth

Urgent Care Center Growth Expectations

5.8% annually

\$14.5 billion urgent care industry expected to grow 5.8% annually through 2018



Source: IBIS World

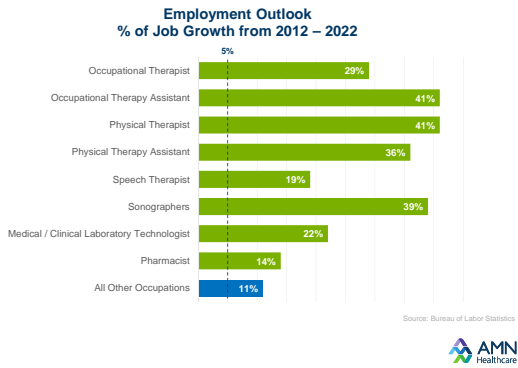




Sooner or Later, We All Need Therapy



Allied Health Growth



Niche Target



- EHR projects requiring staffing support**
 - EHR implementation**
 - Paper to electronic
 - Transition from one software to another
 - Upgrade current system
 - New facility opening**
 - Unit expansion**
-

EHR Positions Needed



- EHR Trainers**
 - EHR Super Users**
 - EHR Backfill Providers**
 - EHR Go-Live Support**
 - On-site Project Coordinator**
-





