

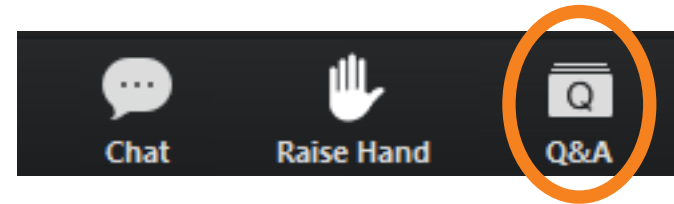
The logo graphic consists of a series of overlapping, diamond-shaped tiles in various colors including red, orange, yellow, pink, green, and dark green, arranged in a pattern that suggests a staircase or a path.

Trella
HEALTH

**Leadership Tools to
Boost Productivity
in 2023**

Housekeeping

Use the “Q&A” feature at the bottom of your screen to submit a question



We will reserve time for our Q&A session at the end

We are recording the session for those unable to attend today

The recording will be sent out after the webinar is completed

Today's Speakers



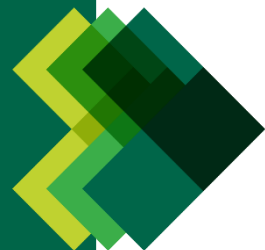
Jessica Chew
VP, Marketing



Josh Price
Solution Engineer



Kara Justis
VP, Strategic Consulting



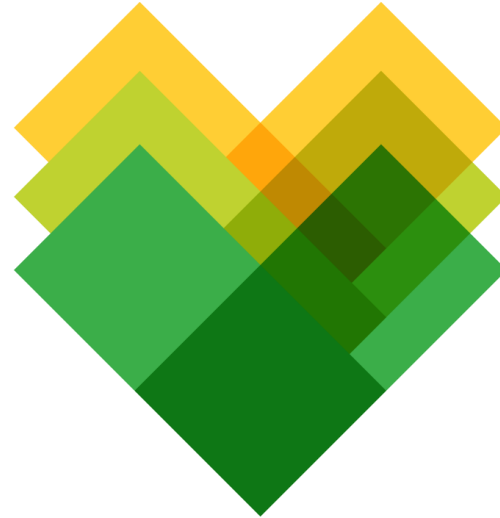
Marketscape

One Integrated Platform for All Your Growth Needs.



Marketscape **INSIGHTS**

Robust Market Intelligence



Marketscape **CRM**

Relationship Management



Marketscape **CONNECT**

EHR Integrations and API Connections

One Source of Sales Truth

Marketscape

INSIGHTS



100% Part A, B & C claims from CMS



Medicare Advantage & Commercial Claims



Data updated quarterly and published prior to other data sources

Trella Health's collective data set covers **90% of all lives 65+ in the U.S.**

CRM



Real-time visibility into sales productivity and ROI



Infused with market data and conversation starters



Historical and current referral trends, reporting, and dashboards

Improve productivity, maintain relationships, and generate new business with data-driven conversations.

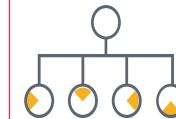
CONNECT



Integrations with **over 30 leading EHRs** for PAC



Clinically connect sales and marketing teams through referral stage tracking



Attribute referrals by **source, branch, and rep** for complete visibility

Closing the gap with **purpose-built integrations** for post-acute sales teams on-the-go.

Agenda



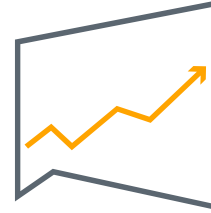
- Driving growth through effective coaching
- Best practices in executing your sales playbook
- Building credibility with data-driven messaging
- Monitoring the right KPIs for productivity
- Getting more time back in your day
- Questions



POLL QUESTION:

What is your confidence level
in measuring rep productivity?

Effective Coaching



- Customize your message, recognize the unique needs of each rep
- Utilize group and 1:1 coaching
- Focus on Situational Leadership
- Focus on one thing at a time, and build on it
- Effective coaching will also be efficient



Playbook Best Practices



**Make it
easily
accessible**



**Update it
regularly**



**Train on it
continuously**

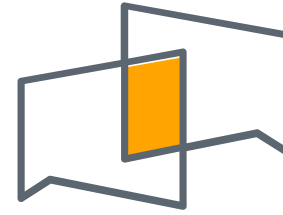


**Hold team
accountable
to using it**



**Manage
to it**

Executing Your Playbook – Role playing



- Incorporate role playing into every sales meeting
- Give reps advance notice of the topic, and let them know to expect role playing
- Don't spend hours on it; 20-30 minutes max
- Focus each mtg on a step of the sales process, or a specific play
- Discuss how to leverage your data and CRM solution
- Reps should leave each sales meeting with actionable guidance



Hospital Case Manager Persona – Home Health

SUCCESS MEASURES

- Re-admissions
- Patient satisfaction

CHALLENGES

- Not enough time
- Re-admissions
- Staffing

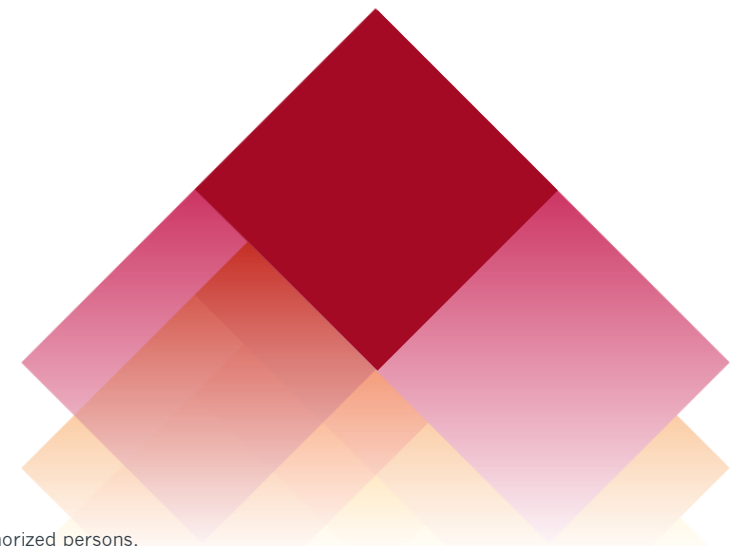
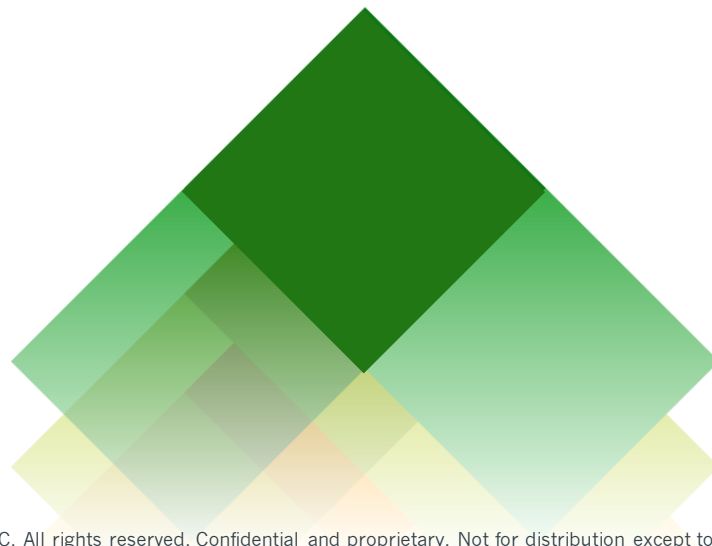
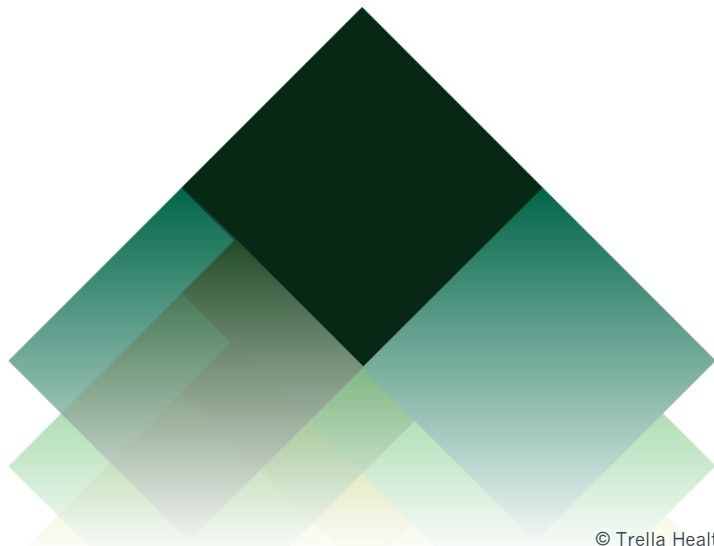
MOTIVATORS & OBJECTIONS

Motivators

- Data
- Ease of use, time savings
- Patient satisfaction

Objections

- We let the patient choose
- We have a preferred provider



How do you earn
the right to
present your
evidence-based
solution?



Leveraging your strengths

Hospitalization Rate within 30 days from Start of Care

At **14.72%** PLEASANT VALLEY CARE, INC's Hospitalization Rate is **2.52% lower** than SUNSHINE CARE, INC's value of **17.24%**.

Total Patient Cost Following HHA (12-month Risk Adjusted)

At **\$35,090** PLEASANT VALLEY CARE, INC's Total Patient Cost is **20.86% lower** than SUNSHINE CARE, INC's value of **\$44,337**.

6-month Risk Adjusted Total Cost of Care following Home Health

At **\$18,882** PLEASANT VALLEY CARE, INC's Cost of Care is **7% lower** than SUNSHINE CARE, INC's value of **\$20,315**.

Making the right play - example

ALIGN YOUR SOLUTIONS

- Patients discharged from Hackensack UMC Pascack Valley were admitted within 2 days of discharge.
- **Value proposition:** timely home health admission prevents re-admissions, makes the Case Manager look good



VALIDATE THE ASSUMED PERSONA

- What are your biggest challenges?
- How is success measured in your role?
- What's most important to you when selecting a home health provider?



ANTICIPATE OBJECTION

- We let the patient choose.
- We have a preferred provide.

Assisted Living Wellness Coordinator Persona – Hospice

SUCCESS MEASURES

- Census/occupancy
- Risk mitigation

CHALLENGES

- No clinical support
- Difficult families
- Staffing

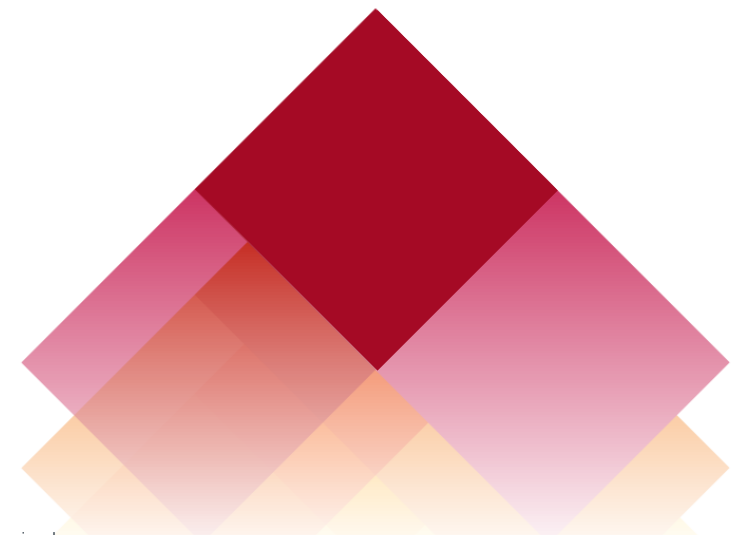
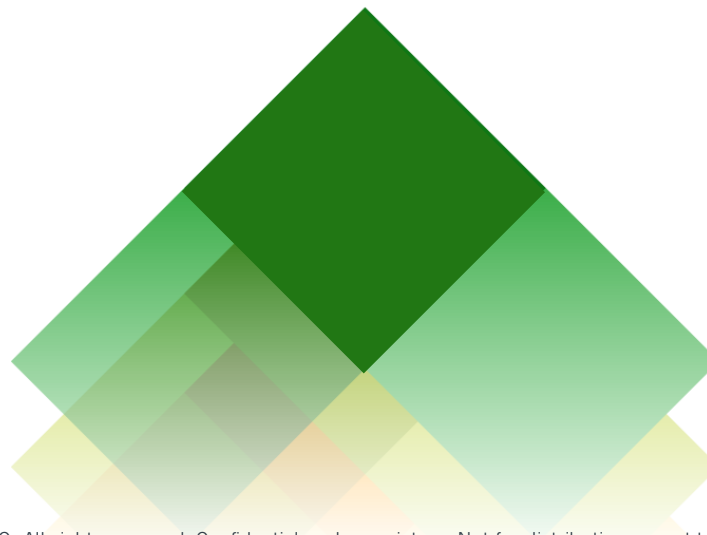
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Making the right play - example

Assisted Living Wellness Coordinator Persona – Hospice

ALIGN YOUR SOLUTIONS

- Visits near death above avg.
- **Value proposition:** Wellness Coordinator can protect their census, while also getting clinical support when they need it most – ease of mind.



VALIDATE THE ASSUMED PERSONA

- What are your biggest challenges?
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- What's most important to you when selecting a home health provider?



ANTICIPATE OBJECTION

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Data-driven messaging as part of coaching

Hospice Example



Market Share Table

Agency	Market Share	% Change Admits
Hospice A	-0.66%	-10.83%
Hospice B	-0.53%	-9.95%
Hospice C	-0.83%	-14.00%
Hospice D	0.72%	11.49%

Facility Destinations

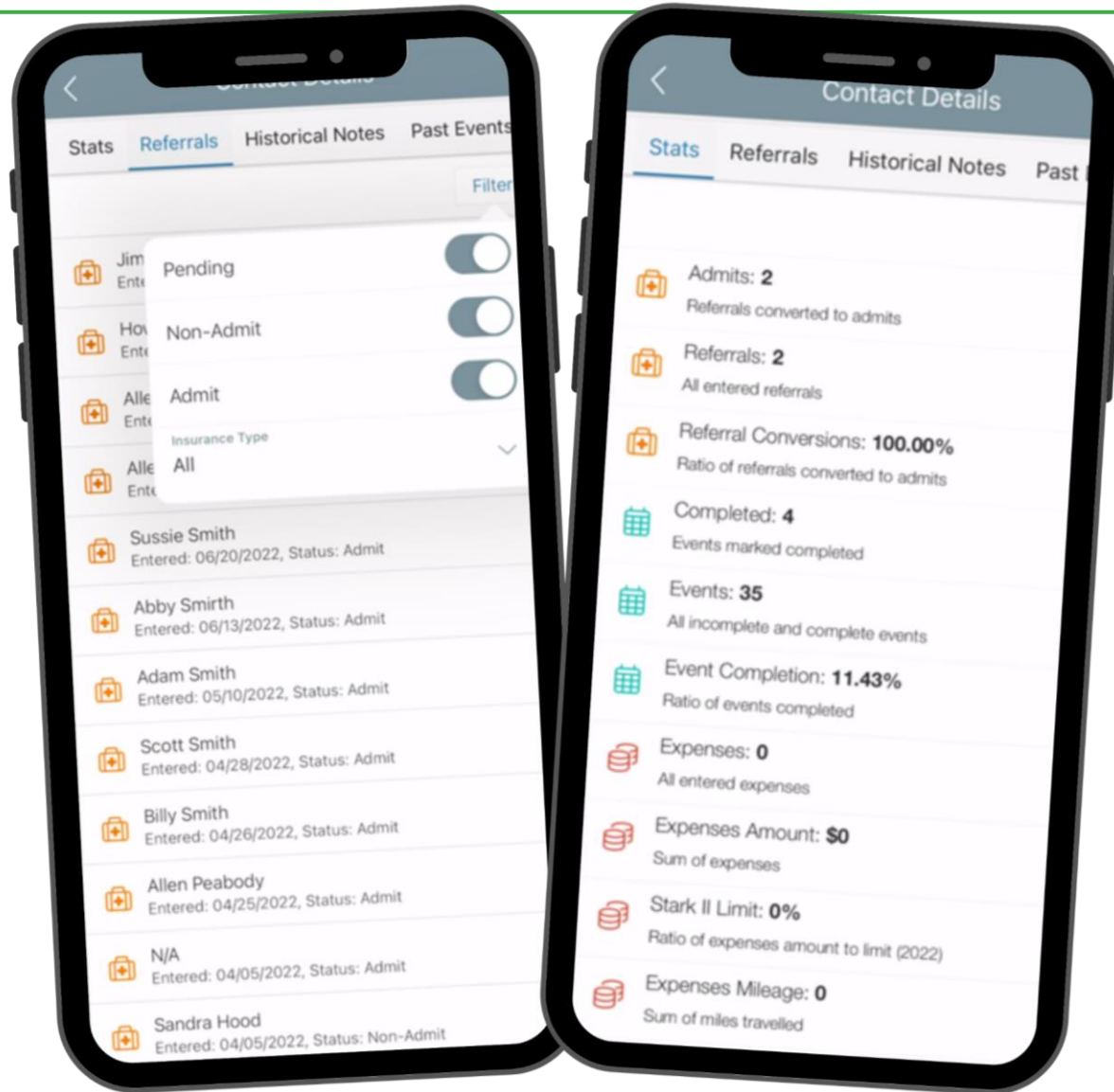
Top Hospice Destinations

Rank	Hospice	Patients	Affiliation
1	Hospice C	107	36.27%
2	Hospice A	62	21.02%
3	Hospice D	52	17.63%

Sales Spotlight

- At 2.71 **Hospice D's** All Visits Last 3 Days is **38.77%** Higher than **Hospice C's** value of 1.83
- At 2.69 **Hospice D's** RN Visits Last 7 Days is **27%** higher than **Hospice A's** value of 2.05

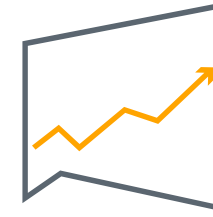
Measuring & monitoring sales performance



Visibility

- Correlate activity to results
- Track Pending, Admitted, and Non-Admit patient details
- Measure % to monthly quota
- Inactivity report for top rated and targeted prospects
- Conversion by account and contact
- Identify performance gaps
- Manage under performance

Summary



Get more time back in your day...

- Be effective AND efficient in your coaching
- Focus on plays; establish a sales mtg agenda and stick to it
- Use data to help your reps see where they can be successful
- Measure everything – focus on activity, audience and message
- Get time back for coaching!



POLL QUESTION:

Would you like to learn more about Trella's data insights, CRM, and/or strategic consulting solutions?



Questions?