



HOW-TO GUIDE: STARTING THE CONVERSATION WITH DOCTORS

Tips for building relationships with local doctor offices.

Starting the Relationship

Your goal is to become a local, trusted resource for Medicare guidance. Here's a few ideas to start relationships with doctor offices.

- Search to find doctor offices near to you.
- Call each doctor office to introduce yourself and to speak to the office manager or doctor. Introduce yourself as a local agent and community resource.
- Ask when you can bring in lunch for the office.
- Stay informed about providers who are moving or leaving, and ask them if you could host a seminar to help their patients stay in-network.
- When you visit, bring a copy of your introduction letter and flyer to leave with them.
- Ask them about any upcoming events, and offer to participate. Offer to laminate their patients' Medicare cards.
- Be real. Be friendly — when they can tell that you care, they will care about what you offer.

Be Compliant!

Your interactions with health care providers need to always adhere to the the Federal Anti-Kickback Statute (42 U.S.C. 1320a-7b), a criminal law which places strict limitations on payments or gifts connected to health providers or patients who receive federally funded services. Find out more [here](#).



Understanding What Doctor Offices Care About

Provider offices all work in unique ways, but doctor offices will often have common concerns and needs for helping their patients. Get to know some basics so you're ready to help:

- Stay on top of changes to coverage in local plans, as this can affect their patients.
- Be informed about any new carriers in the network or carriers that are leaving.
- Doctors may not have a lot of time with each patient, so having someone who can answer coverage questions can help.

Nurture the Relationship

Increase your “stickiness” so that each provider office remembers you with simple gestures:

- If you offer a client newsletter, ask if you can place it in their waiting area.
- Enhance their waiting room experience by stocking a candy bowl or bringing flowers.
- Deliver healthy snacks for the office staff (make sure you leave a note with the food, reminding them you have stopped by and how to get in touch).
- Talk to everyone you encounter to build relationships: billing clerk, receptionist, doctors, nurses and so on.
- Find ways to create materials with your contact information, and leave them at the office for patients. It could be simple items that add value, like pens, medication trackers or pill boxes.

Be Their Local Resource

Your relationship with providers can help their patients' well-being. You're helping with patient peace of mind, answering their broader health care coverage questions, supporting higher patient satisfaction and making sure patients have access to the right Medicare plan for their needs.