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# How to Connect for Success



*Brought to you by*

**The Alliance of Professional Health Advocates**

[www.APHAdvocates.org](http://www.APHAdvocates.org)



## The Alliance of Professional Health Advocates

is pleased to offer you this Connections presentation to help you kick start your new year of success.

Our goal is to help patients get what they need from the healthcare system. You are the vehicle for making that happen. **Your success is our success.**

We are available at all times to help our members build their advocacy and care management practices to support that success. Call on us. We want you to connect, and to succeed.

Connect for Success in 2018!



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# Your Challenge

- Connect with **2 new people per week\***:

- One you can help.
- One who can help you.

- Make it your own business assignment, using a specific procedure (we'll look at that shortly)

- Engage: (we'll look at this shortly, too)
- Put what you learn into action.
- Repeat!

*\* Yes, of course you can connect with more! Two connections should be your minimum.*



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# Who should you connect with?

- **Clients:** the bread and butter of your practice
- **Other Advocates:** support systems, leaders, complementary service providers, mentors
- **Other Professionals:** medical providers, social workers, lawyers, business advisors, community service providers, educators, organization leaders
- **Influencers:** media, clergy, medical providers, other possible referral professionals like lawyers, financial advisors, senior service providers, community leaders



# People You Can Help

- **Clients:**

People on your email list, people you meet, people who contact you for help, caregivers, employers, others who might engage you to help themselves, or someone else they want you to help.

**Ask them questions as if you want them to help you:**

*“Mrs. Jones, I’m getting my advocacy practice started. What situation would compel you to call an advocate? What would you be looking for in an advocate?”*

- **Other Advocates:**

Other APHA members who are newer than you or haven’t yet begun their paths to success, possible referral advocates, advocates or care managers who may not offer the services you offer but could expand their practice if you would help. There are many ways to help other advocates so you both succeed.

- **Influencers:**

Media is always looking for stories and experts, clergy know who is sick, lawyers and financial advisors want to support their clients (and make more money), organizations are looking for speakers. Influencers want to be heroes, and you can help them be heroic.



# People Who Can Help You

- **Other Advocates:**

Those who can help you build your practice when they offer services you don't offer, and you can subcontract with them. Plus mentors, and those who have developed business skills you have not yet developed.

- **Other Professionals:**

Can help you improve your clients' journeys. Providers can help you answer questions, social workers and other community workers know good resources.

- **Influencers**

Can help you spread the word about your advocacy, and refer clients to you.

- **Other Professionals**

Especially during the early days of your practice, seek out SBA, SCORE, or SBDC business counselors, advocate mentors, educators, or business coaches who can keep you on track.



# Connection Process and Goals

- Create a connections calendar. Set aside time to work on this part of your business each week. (1-2 hours should be enough.)
- Make lists of those you can help, and those you think can help you, to draw from for your future connections. Ideally they will be people you haven't yet met, so the connection will help you each learn more about the other.
- Good connections are all about asking questions and getting answers, no matter whether you are the helper, or the helpee. Over time, when you think of them, write down your questions so you can draw from them as needed. Your choices of people to connect with can be based on your questions.
- Use the *Engage! Process* to manage your connections (coming soon...)



# How to Connect

- **Make an appointment.** Use email or phone to do so, and try to do so at least one week in advance. Tell the person you want to connect with exactly why you want to do so, how long you would like to spend with them, and give them some dates and times to do so. Schedule 30 minutes. (It may run longer, but let your contact determine that.)
- **Meet by phone, by video (Skype, Hangouts, Zoom), in your office, their office, or even in person in a public place.** A coffee shop is a great setting, and since you're the inviter, you should spring for the coffee.
- **Take notes,** or if your new connection is willing, record the session, then take notes later.
- **Important!** Follow up with an enthusiastic **thank you** that includes something you learned that will help you move forward.



# Engage! (Step-by-Step Process)

- **Ask useful questions.** *When you do public speaking, what topics do you offer?*
- **Provide useful advice.** *Do you have a BNI in your city? It's a great place to network.*
- **Share resources.** *I quite often share Hospital Compare with new clients to determine infection rates.*
- **Keep track.** Add new people, their contact info, and notes about conversations to your Contact List.
- **Take notes.** Record impressions, possible collaborations, referrals, new ideas, resources, and possible follow up questions.
- **Follow up.** Send a thank you email with your contact info and suggestions for collaborations, if that seems possible.
- **Put what you learn into action.**
- **Repeat!**



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# Where to Find Your Connections\*



- **New Clients:**

These folks may find you first, but you should actively seek them out, too. Ask former clients to make referrals, talk to influencers to see if they know of potential clients you can interview, attend support group meetings, give out your business card everywhere you go. Finding new clients requires good marketing. Your goal in finding new clients is for them to eventually hire you, even though that may take a long time. (They won't actually hire you until they need you, even though they might be willing to talk with you today.)

- **Other Advocates:**

Attend networking events, find interesting people in discussion forums or online, join organizations that encourage you to connect with others, look in the AdvoConnection Directory.

*\*Links and resources can be found on the last page of this program.*

# Where to Find Your Connections\*

- Other Professionals:

Find them online, at local networking events (Chambers of Commerce, BNIs), referrals from others, through your local Bar Association, regional directories

- Influencers:

- Media: go online to read about reporters and their interests, or reach out to assignment editors at newspapers, radio stations, TV
- Clergy: find the visitation person at large churches or synagogues
- Lawyers: Reach out to your local Bar Association and ask about sections that oversee eldercare, wills and estates, and other legal specialty areas that focus on your own target audiences
- Financial advisors: call on these advisors and discuss the advantages to them of having their clients work with you

*\* Links and resources can be found on the last page of this program.*



# Ideas for Topics to Discuss

- Your connections' backgrounds including education and experience, certification, the services they offer, their overall plans and goals, reasons for choosing their profession (when applicable) depending on which connection group they are part of.
- Similarities between you and your work. Then differences – which may yield ways you can work together.
- Local health systems, their plusses and minuses.
- People you both know who have been helpful. People who haven't been so helpful (people to avoid!), people the other person knows who might be worth an introduction. People you are willing to introduce the other person to.
- Local and online resources generally available to your clients.
- Specifics of cases, minus names (HIPAA considerations.)
- Patient Advocate Certification
- Advocacy programs and organizations. Wish lists for the support you both need. (Then report those to APHA please!)
- The weather – or anything else at all! This is about establishing a bond. Share with each other!



# Some Final Thoughts

- Mix up your outreach so that you are tapping into different groups of connections. One week talk to another advocate plus a business advisor. The next week, talk to a client and a provider, etc.
- When it comes to identifying other advocates, choose those who live and work in a different region from yours so that no one feels as if they are sharing too much with a potential competitor.
- Make your interest in the other person obvious. Work to make the conversation at least as much about them as it is about you, if not more so. Such obvious interest will help them understand that you truly do want to learn about them and share information.
- Try to come away from each connection with one new idea, and a commitment for yourself to research its implementation. Then implement those that make sense for your goals. At two connections per week, that's more than 100 new ideas per year to move your practice forward!



# Resources: Find People and How-Tos

- APHA, The Alliance of Professional Health Advocates
  - Members – check out the supporting material at your membership site: [www.myAPHA.org](http://www.myAPHA.org)
  - Not yet a member? Then join us! [www.APHAdvocates.org](http://www.APHAdvocates.org)
- AdvoConnection Directory – find advocates from across the US and Canada: [www.AdvoConnection.com](http://www.AdvoConnection.com)
- How-tos on finding new clients, connecting with media, public speaking, talking to providers, and much more: **The Health Advocate's Career Series** (books) [www.HealthAdvocateResources.com](http://www.HealthAdvocateResources.com)
- The APHA Summits – connect with other advocates in your region – in person! Please learn how to cement your connections, and market to clients: [www.APHASummits.com](http://www.APHASummits.com)
- Educational programs and organizations – step up your learning and make connections with other students: [www.HealthAdvocatePrograms.com](http://www.HealthAdvocatePrograms.com)
- Find business advisors through your local [SBA](#), [SBDC](#), or [SCORE](#) (sometimes for free!)



# Now go forth and Connect for Success !



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