

# Playbook for Health Care Providers



# Playbook for Health Care Providers



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## I. Buyer Persona

Title:	
Location:	
Years in Business:	
Revenue:	
Staff:	

### Goals:

### Challenges:

### Objections:



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## Marketing Message:

## Elevator Pitch:

## II. Initial Meeting Questions

### Basic Information:

1. How long have you been in practice?
2. Can you describe the demographics of your typical patient?



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## Current Insurance:

1. What specific coverages do you currently have?
2. What was the decision-making process you used to choose these coverages?
3. What do you find most valuable about your current insurance package?
4. What are the drawbacks or what do you wish could be improved?

## Risk Perception and Pain Points:

1. Have you or your practice faced any challenges or risks that made you reconsider your insurance needs?
2. What are your biggest fears or concerns regarding potential risks in your practice?
3. Are there any specific coverages you've been contemplating?



### III. Budget and Decision-making

1. Who are the decision-makers for choosing an insurance package?
2. Do you have a budget allocated for insurance coverage?
3. Are there any insurance requirements mandated by partnerships or professional affiliations?

### IV. Setting the Pre-Close

### V. Rules of Engagement

1. **Needs Assessment:** A comprehensive discussion to understand your unique insurance requirements.
2. **Customized Solutions:** We present a draft proposal aligned with your needs, budget, and practice goals.
3. **Feedback Loop:** Opportunity for you to suggest changes or seek clarifications.
4. **Final Review and Agreement:** Detailed overview of finalized package before signing.



## VI. Company Profile Questionnaire for Quoting

### Company Information:

1. Name of the Practice:	
2. Years in Operation:	
3. Annual Revenue:	
4. Total Payroll:	
5. Estimated Budget for Insurance:	
6. Types of Treatments/Procedures:	
7. Number of Full-Time Employees:	
8. Number of Part-Time Employees:	
9. Do you subcontract any services?	
Yes      No	
<i>If yes, is there a hold harmless agreement?</i>	Yes      No
10. Membership in Professional Associations:	



## VII. Risk Assessment

1. What is the age and condition of the building where your practice is located?

2. Please list the specific types of treatments or procedures offered at your practice.

3. Do you have an active list of all the equipment and technologies used?

4. Do you store hazardous materials, pharmaceuticals, or controlled substances?

5. What safety measures do you have in place for both patients and staff?

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6. Do you have any kind of data protection for patient records?

7. Are all the licenses for practitioners and the facility current and in good standing?

8. Any history of malpractice claims or other legal issues?

9. Do you have existing protocols for crisis management, such as a fire or cybersecurity attack?

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10. Would you like information about integrating financial planning, investments, or other high-value coverages?



## Healthcare FYI

### **CHIROPRACTORS**

Category: Health Care Providers

SIC CODE: 8041 Offices and Clinics of Doctors of Chiropractic

NAICS CODE: 621310 Offices of Chiropractors

Suggested ISO General Liability Codes: 66561

Suggested Workers Compensation Codes: 8832

### **DENTAL LABORATORIES**

Category: Health Care Providers

SIC CODE: 8072 Dental Laboratories

NAICS CODE: 339116 Dental Laboratories

Suggested ISO General Liability Code: 12014

Suggested Workers Compensation Code: 4692

### **DENTISTS**

Category: Health Care Providers

SIC CODE: 8021 Offices and Clinics of Dentists

NAICS CODE: 621210 Offices of Dentists

Suggested ISO General Liability Code: 66561

Suggested Workers Compensation Code: 8832

### **HOME HEALTH CARE AGENCIES**

Category: Health Care Providers

SIC CODE: 8082 Home Health Care Services

NAICS CODE: 621610 Home Health Care Services

Suggested ISO General Liability Code: 44500, 44501

Suggested Workers Compensation Code: 8835



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## **OPTOMETRISTS**

Category: Health Care Providers

SIC CODE: 8042 Offices and Clinics of Optometrists

NAICS CODE: 621320 Offices of Optometrists

Suggested ISO General Liability Code: 66561

Suggested Workers Compensation Code: 8832

## **PHYSICIANS**

Category: Health Care Providers

SIC CODE: 8011 Offices and Clinics of Doctors of Medicine

NAICS CODE: 621111 Offices of Physicians (except Mental Health Specialists)

Suggested ISO General Liability Code: 66561

Suggested Workers Compensation Code: 8832

## **PODIATRISTS**

Category: Health Care Providers

SIC CODE: 8043 Offices and Clinics of Podiatrists

NAICS CODE: 621391 Offices of Podiatrists

Suggested ISO General Liability Code: 66561

Suggested Workers Compensation Code: 8832