

KELLEY KNOTT

Expert Insight



BEGINNERS GUIDE

New Physician Liaison
CHECKLIST

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INTREPY HEALTHCARE MARKETING

Congrats on your new role as a physician liaison!

A role of a physician liaison is both exciting and a great way to expand your career in healthcare marketing.

But you're ready to hit the ground running and need a little help to kick start your marketing, I got you covered with my new physician liaison checklist!

☐ **DEFINE YOUR ROLE & RESPONSIBILITIES**

What is expected from you, day to day, and goals?

☐ **GET TO KNOW YOUR PHYSICIANS & STAFF**

Is it clear who you are, what you do, and how and why to get a hold of you?

☐ **GATHER THE DATA YOU NEED**

Collect the data, analytics, and information on the current status of the physician referral program.



☐ RESEARCH THE CLINICAL SIDE

Dive into the medical world! Get to know all the in and outs of the organization and what clinical information you need in your messaging.

☐ GET FAMILIAR WITH THE TOOLS, SOFTWARES, AND RESOURCES

You will have a lot on your plate, so make sure you have a good understanding of the software and tools that will keep you organized and on track.

☐ START ASKING QUESTIONS

You're not expected to know it all on your first day. Ask questions even if you're afraid of looking stupid. The more you ask, the more you know.



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☐ DEVELOP YOUR PHYSICIAN LIAISON MARKETING PLAN

Alright, you have the data, you know the targets, you have researched the material...

Now it's time to put the plan on paper. Create benchmarks and goals as well as your marketing plan while in the field.

☐ A/B TEST YOUR MESSAGE

Start to craft your message and test what works and what doesn't.

☐ RIDE ALONG

Watch and learn with a ride-along. Bring someone in the field with you, a Sr. liaison, office manager, and/or a physician. Watch and learn



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☐ BE PREPARED FOR OBJECTIONS

Be prepared for objections from gatekeepers and staff members and address how you will overcome those challenges.

☐ TRACK YOUR MARKETING

Keep detailed notes on your marketing visits, who you talked to, where you went, and what you talked about.

☐ SHARE YOUR SUCCESS

Keep your physicians and team in the loop with the growth and progress of the program!



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☐ PLAN YOUR NEXT VISIT

The work has just begun, plan what you need for your next visit to build lasting referral relationships.

☐ FIND NEW OPPORTUNITIES

Be creative and explore new physician referral opportunities, maybe a new practice, new territory, or new specialty.

☐ INVEST IN YOURSELF

Never stop learning! Invest in training and education that can help you grow. If you need additional support, to connect with other liaisons.

☐ BUILD YOUR NETWORK

Research ways you can get involved in the local healthcare and business community to build connections and relationships.



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☐ HAVE FUN

This is an exciting time; you will make mistakes. BUT you also have BIG ones. Let loose have fun and let yourself grow.

**FOR MORE PHYSICIAN LIAISON TRAINING AND
TO JOIN A GROUP OF LIKE-MINDED LIAISONS
ENROLL IN MY PHYSICIAN LIAISON
MASTERCLASS, PHYSICIAN LIAISON
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