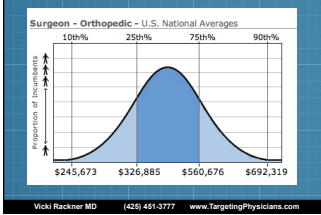


Cracking the Physician Code



Cracking the Physician Code



Cracking the Physician Code

What makes this a great time to acquire physician clients?

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Financial Wake-Up Call

- Rising taxes
- Looming fee cuts while costs of business continue to rise
- An uncertain economic recovery
- The Affordable Care Act AKA *ObamaCare*

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Cracking the Physician Code

Physicians answer a call to medical service.

Put patients first
Alleviate pain and suffering
Carve their legacy.

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Physicians engage in a lengthy training process

Undergraduate degree
Medical school
Residency
Optional fellowship training

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Physicians' skills and temperament traits needed to get through medical school make them challenging prospects and clients.

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The single most influential person in a physician's life is a mentor or senior colleague.

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Biggest Surprise

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For physicians,
money is the
ultimate
taboo topic.



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The Financial Lives of Physicians

1. The culture of medicine.
2. Low financial literacy.
3. Awareness of their vulnerability.

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1. Benign neglect.
2. Do-it-yourself.
3. Delegate.

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Biggest Secret

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If you want to
conduct business
with physicians,
conduct yourself as
one.



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Mirror Neurons



Mirror Neurons

"I like you."

"I'm like you."

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The Biggest Secret

MD

Physical Health

FA

Fiscal Health

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Biggest Key

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Physicians manage their wealth as patients manage their health.

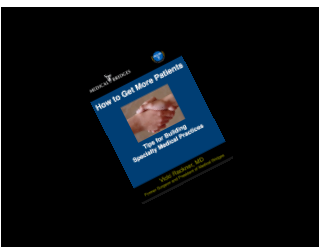


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Teacher Leader

"Pati" Leadee





The B2D Blueprint

- Lesson # 1: Give Gifts
- Lesson # 2: Educate
- Lesson #3: Talk to Influencers
- Lesson #4: Attend Physician Gatherings
- Lesson #5: Sponsor Events
- Lesson #6: Recruit Physician Opinion Leaders
- Lesson #7: Repeat Your Message

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2013 Report on U.S. Physicians' Financial Preparedness

2013 REPORT Key Findings

- Half of physician respondents believe they are behind where they'd like to be in retirement preparedness; only 6% feel they are "ahead of schedule."
- Physicians reported gaps in personal financial knowledge and lack of confidence in financial decisions that include retirement savings, life and disability insurance coverage and estate planning.
- Female physicians trend behind male counterparts in many areas of financial preparedness.
- All have a healthy concern for the future; retirement savings is a top issue for all age groups.

AMERICAN INSURANCE

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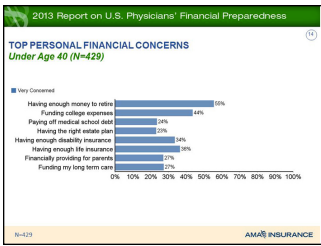
AMERICAN INSURANCE

2013 Report on U.S. Physicians' Financial Preparedness

RETIREMENT PREPAREDNESS Additional Findings

- Of the 6% who consider themselves "ahead of schedule" versus other respondents, the key difference appears to be based on a deeper knowledge level of personal finance issues rather than age, gender or specialty.
- Family Medicine and Internal Medicine physicians, and female physicians in general are more likely to feel behind where they'd like to be.

N=2,365 AMERICAN INSURANCE



The B2D Blueprint

Strategy Tactics

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Step #1: Focus
Choosing Your Best-fit Clients

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High Performers
vs
Hobbyists

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The B2D Blueprint

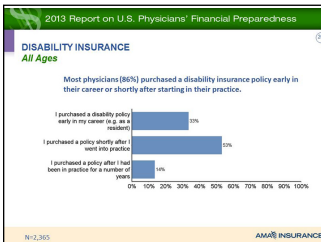
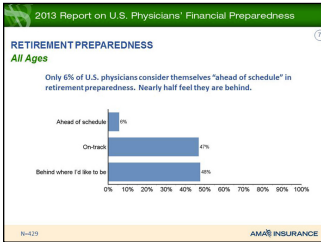
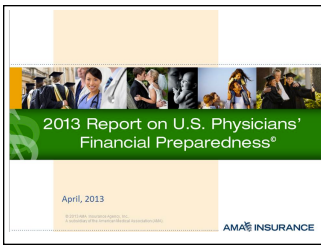
Focus contributes to
high performance and
accelerated growth.

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The B2D Blueprint

1. Like-minded
2. Gather regularly
3. Affinity

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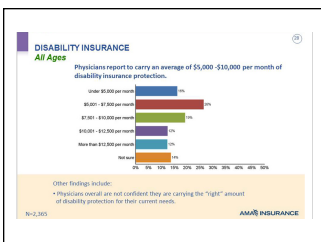


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AMA INSURANCE



2013 Report on U.S. Physicians' Financial Preparedness

DISABILITY INSURANCE
All Ages

Slightly more than three quarters (77%) of respondents believe disability insurance is essential and the majority (74%) of them have a policy.

Response	Percentage
It's essential	77%
It's nice to have, but optional	21%
It's not important	2%

Other findings include:

- 75% have disability coverage through employer; 35% have a policy through employer as well as a personal policy they purchased shortly after residency.

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2013 Report on U.S. Physicians' Financial Preparedness

DISABILITY INSURANCE
Additional Findings

- 60% of physicians have known of a doctor who suffered a disabling accident or injury.
- Most respondents believe their policy offers "own-specialty" protection, although 50% are not sure.
- Nearly 40% of doctors under age 50 do not feel adequately prepared if they were to suffer a disabling accident or injury.

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Step #2: Research

Gathering Intelligence

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**Be in the right place
at the right time
with the right
message**

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"Courage is what it takes to stand up and speak; courage is also what it takes to sit down and listen."--Winston

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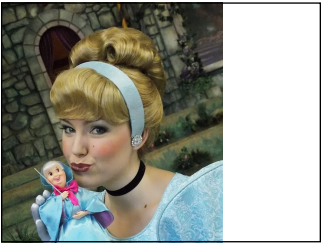
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Step #3: Groom for Engagement

Optimizing your medical magnetism



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My \$40K Mistake

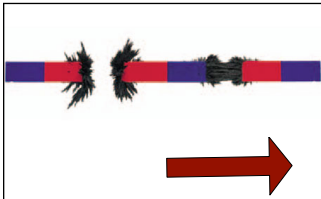
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Deliver what prospects want and earn the privilege to deliver what they need.



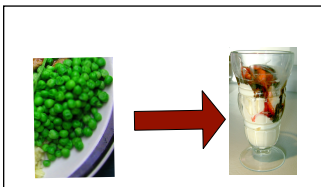


Repel -3 -2 -1 0 1 2 3 4 Attract

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Needs → Wants

Repel 0 1 2 3 4 5 Attract



Repel 0 1 2 3 4 5 Attract

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Positioning Statement

The B2D Blueprint



The B2D Blueprint

1. Relationship Marketing
2. Educational Marketing
3. Community Marketing

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Step #6: Generate Referrals

Get doctors talking



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Conspiracy of Service

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The Referral Toolkit

1. The right mindset
2. The right language
3. The right habits

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The speed at which your referral-based practice grows is driven by:

- Your ability to deliver the right message to the right person at the right time
- The strength of the tribal affiliation
- Your perceived value.

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Cracking the Physician Code

Make a Plan



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The B2D Blueprint

Do What
WORKS
for YOU

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Rx Dr. Vicki's
Rx for Health

Be who you are.
Know what you know.
Do what you need to do.

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Action Step:
What's your \$400K
idea?

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Insurance Marketing Organization



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What's your \$400K
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The B2D Blueprint

How to Optimize Your
Medical Magnetism
and
Engage More Physician
Referrals and Clients



Your feedback for:
- Understanding what drives and
- identifying your unique value
- determining the effectiveness of your
- marketing programs and
- determining how to best use the
- marketing budget

Contact your
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Office

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