

UNDERSTANDING YOUR COMPETITION: EVALUATING, POSITIONING, AND BRANDING

ALAN A. AYERS, MBA, MACC

CONTENT ADVISOR AND BOARD OF DIRECTORS,
URGENT CARE ASSOCIATION OF AMERICA
ASSOCIATE EDITOR, JOURNAL OF URGENT CARE MEDICINE
VICE PRESIDENT, CONCENTRA URGENT CARE

Learning Objectives

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Upon completion of this course, attendees will be able to:

1. Understand the service attributes that are important to patients and properly define “what” and “who” is “competition” based on consumer behavior.
2. Conduct an inward evaluation of an urgent care center’s strengths, weaknesses, opportunities and threats, focusing on how well the center meets patient expectations and identifying what patients “like” and “dislike” about the center.
3. Develop a structure to assess each competitor’s strengths and weaknesses relative to location, facility, scope of services, operating hours, staffing model, technology, process, insurance participation, cash pricing, leadership, funding, branding and marketing tactics.
4. Consider the impact of competition on business strategy including operating model, market and site selection in order to create a plan to respond to competition through patient segmentation, service innovation, customer loyalty, marketing differentiation and acquisition.
5. Know the various methods of competitor research, recognize and abide by ethical and legal guidelines, and realize the value of identifying and implementing best practices observed from competition.

Drivers of Urgent Care Visits

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- Insurance referrals
- Drive-by visibility
- Clear signage
- Repeat visits
- Word-of mouth
- Paid advertising
- Grassroots tactics
- Employer referrals
- Physician referrals
- Media exposure
- Internet search



Forecasting Model Components

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- Households or Establishments
- Population or Employees
- Demographics or SIC Codes
- Propensity to Utilize Services

**Density:
Trade Area Factors**

- Retail Adjacencies/Draw
- Signage Visibility
- Traffic Counts/Accessibility
- Aesthetics

**Site:
Real Estate Factors**

- Operating Hours
- Medical Providers/Training
- Equipment/Capabilities
- Customer Service

**Operations:
Delivery Factors**

**Marketing:
Limiting Factors**

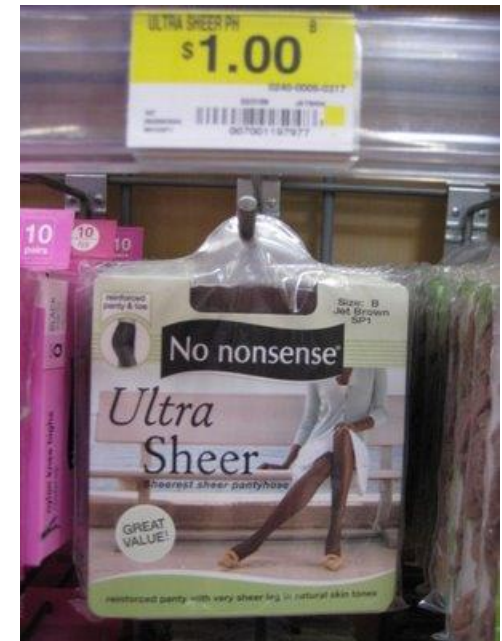
- Payer Penetration
- Competition**
- Marketing Budget

Volume Projection

On learning from competitors...

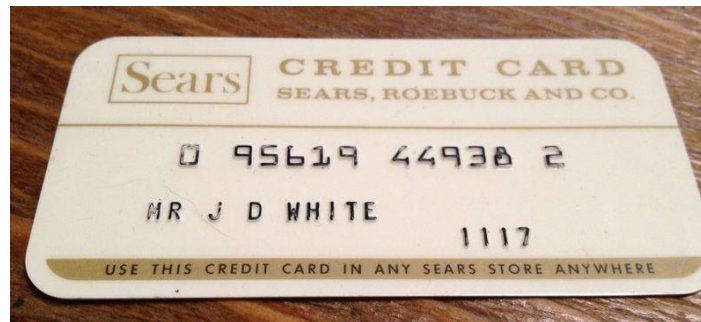
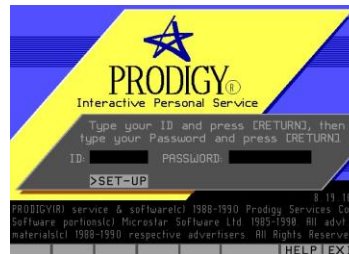
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“If you get one good idea, that’s one more than you went into the store with, and we must try to incorporate it into our company.” --Sam Walton



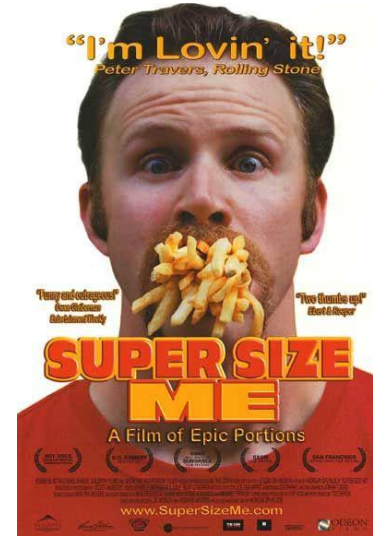
No matter how strong at the moment, no business is immune to competition and demographic changes.

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Follow what's going on with the industry and with the competition.

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Pair the competitors...

8



Pair the competitors...

9



Who is competition for urgent care?

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Urgent Care Competition

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Urgent Care Competition, cont'd.

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An advertisement for elite care 24/7 Emergency Care. The top text reads "24/7 EMERGENCY CARE WITHOUT THE WAIT". Below this, it states "ELITE CARE IS A LICENSED FULL SERVICE FREE STANDING EMERGENCY DEPARTMENT". A list of services includes: "Wait times are typically 10 minutes or less", "Highly qualified ER physicians 24 hours a day", "Radiology department on-site with CT, X-Ray & Ultrasound capabilities", "Advanced cardiac life support", "Emergency trauma and critical care capabilities", "Laboratory tests and results within minutes", and "Acceptance of most insurance plans and all major debit and credit cards". The ad features a photo of a child being examined by a nurse and a "NOW OPEN!" starburst. At the bottom, it provides the address "4780 STATE HWY 121 LOCATED AT HWY 121 & JOSEY LANE", phone number "214-469-2500", and website "www.ellitcareemergency.com".



Urgent Care Competition, cont'd.

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She's uncomfortable. You should be too.

At Children's Close To HomeSM centers with urgent care services, we're staffed and equipped to care for children. Only children. That means you can rest assured your child will get the right care, the first time. Because here, kids and their parents benefit from our experience and the expertise that makes us pediatric specialists. You should always call your child's doctor first, but because we know kids, we know your doctor may not always be available when you need help. So our urgent care services are accessible during evening and weekend hours. All of which should make everyone, especially your kids, feel a lot more comfortable.

 **Children's**
CLOSE TO HOMESM
HEALTH CARE CENTER
ChildrensCloseToHome.com/urgentcare

Urgent Care | 5675 Venture Drive | 614.335.8400 | Monday-Friday 3-10 pm, Saturday-Sunday noon-8 pm

Urgent Care Competition, cont'd.

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Urgent Care Competition, cont'd.

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Urgent Care Competition, cont'd.

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Urgent Care Competition, cont'd.

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Urgent Care Competition, cont'd.

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Urgent Care Competition, cont'd.

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Urgent Care Competition, cont'd.

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Five-Step Process of Competitive Differentiation

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Step 1: Define the business you're in.

Step 2: Identify the universe of competitors.

Step 3: Assess each competitor's business model.

Step 4: Identify competitor strengths/weaknesses.

Step 5: Differentiate from the competition.

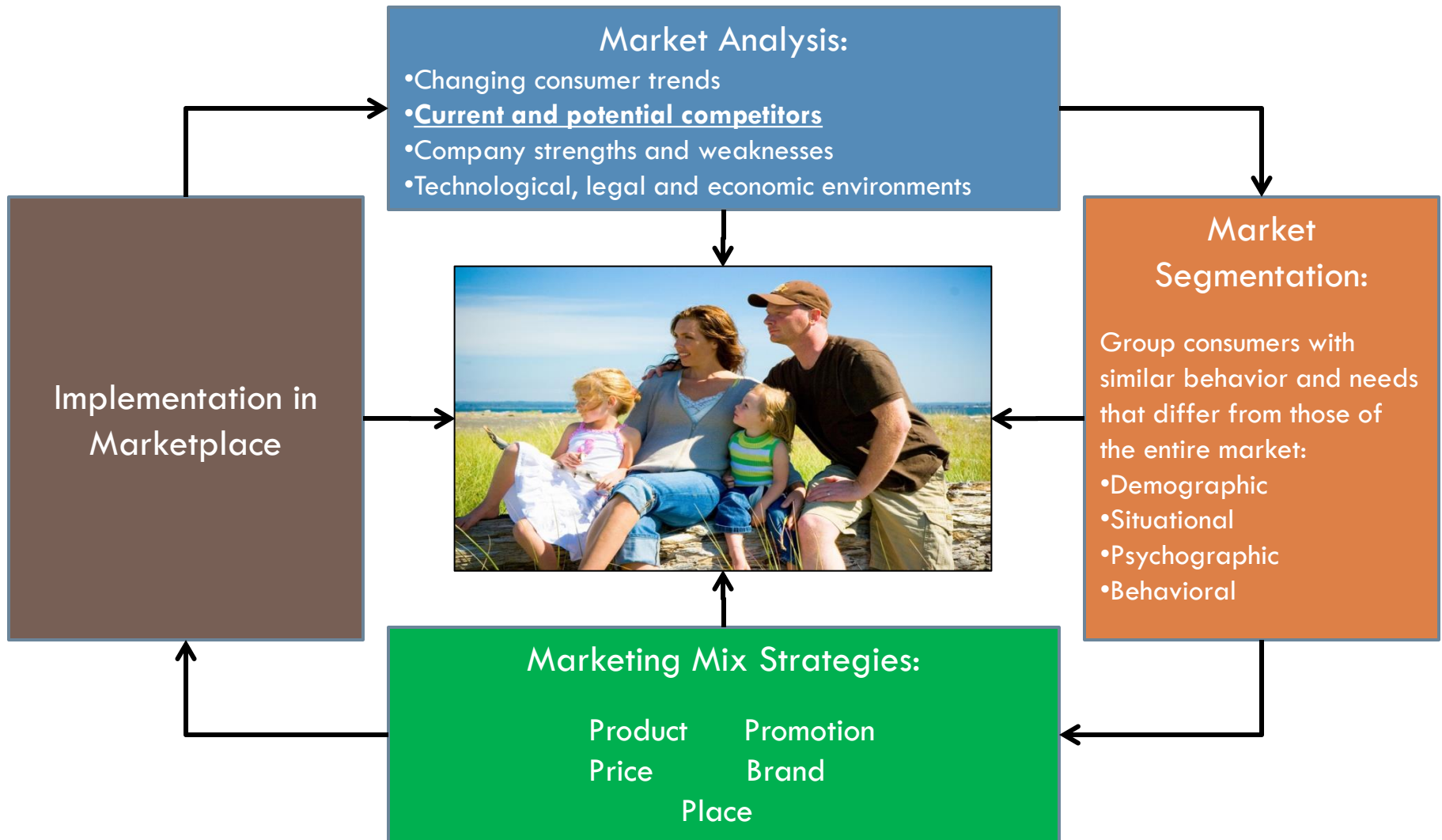
Step 1: What business are we in?

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- Working definition of urgent care:
 - ▣ *Non-scheduled, walk-in treatment of acutely arising episodic medical conditions that require immediate attention but are not medical emergencies.*
- Adding value from a consumer perspective:
 - ▣ Help me feel better, sooner.
 - ▣ Get me back to work and life.
 - ▣ Give me peace of mind.
 - ▣ Make me compliant.

Consumer-Centric Marketing Strategy

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Consumer Urgent Care Demographics



Married Couple with Children Present



College Graduate Age 35-54



Owner-occupied Single Family Housing



Growing Suburbs of Major Metro Areas

Member ID

HUMANA. www.humana.com
Guidance when you need it most

PPO

Subscriber: JOHN Q SAMPLEMEMBER	Coverage Type: ECH
Group Name: SAMPLEGROUP	Group ID: 123456
Member I.D.	Member Name:
555550667	01 JOHN Q SAMPLEMEMBER
555550667	02 JANE B SAMPLEMEMBER
555550667	04 JAKE C SAMPLEMEMBER
555550667	05 WILLIS R SAMPLEMEMBER
Effective Date	
01/01/2006	
01/01/2006	
01/01/2006	
01/01/2006	

Ofc Visit Co-pay	ER Co-pay	Pharmacy Benefit
\$5	\$10	\$5/\$10/\$40/20%

Pharmacists: 1-800-865-8715
 ANSI BIN # 610649
 PCN # 03190000

Employer-Provided Health Insurance



Household Income \$50,000 to \$100,000

Suburban Soccer Moms

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The Business of Urgent Care

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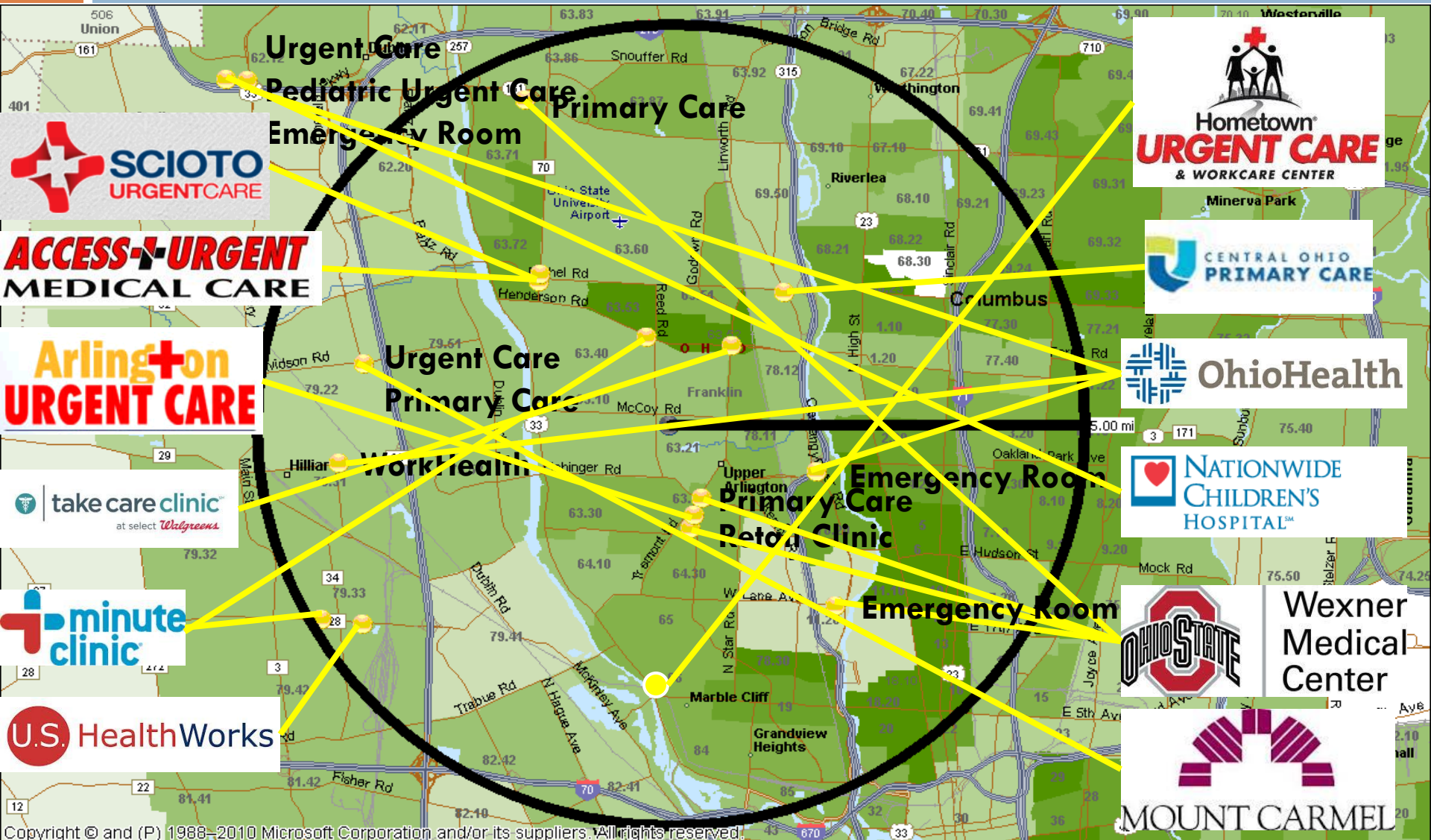
- Urgent care is successful to the extent it:
 - ▣ Understands the wants, needs, and motivations of:
 - Patients
 - Employers
 - Payers
 - Partners
 - ▣ Creates a delivery model to meet those needs:
 - People
 - Processes
 - Technology

Step 2: Identify the Universe of Competitors

- A competitor is any existing or *potential* option available to consumers to meet the same need that an urgent care center intends on meeting.
- Competitors include:
 - ▣ Other walk-in urgent care centers
 - ▣ Primary care offices (advance- and same-day appointments)
 - ▣ Hospital emergency rooms
 - ▣ Freestanding emergency rooms
 - ▣ Pediatric after-hours
 - ▣ Retail health clinics
 - ▣ Occupational medicine clinics
 - ▣ Employer worksite clinics
 - ▣ Student health centers
 - ▣ Telemedicine (Internet, telephone consultations)

Urgent Care Competition: 5 Mile Radius of Upper Arlington, Ohio (Population 34,000)

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Urgent care's biggest competitors are likely...

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- ❑ Self-treatment (over-the-counter, Internet research)
- ❑ Doing nothing (letting condition resolve on its own)

The screenshot shows the WebMD website interface. At the top, there is a search bar and navigation links for "My WebMD Sign in", "Sign Up", and "Why WebMD?". Below this is a navigation menu with categories: "Health A-Z", "Drugs & Supplements", "Living Healthy", "Family & Pregnancy", and "News & Experts". The main content area is titled "Cold, Flu, & Cough Health Center". On the left, there is a sidebar with "Cold & Flu Health Center" and "Cold Guide" sections. The main content area features a "Tools & Resources" section with links like "Can Bad Teeth Affect Sinuses?", "Does Vitamin C Help Colds?", and "How to Manage a Cough". Below this is a "Listen" section with the article "Cold Medicine and Treatment: When? What? How?". The article text discusses the effectiveness of cold medicines and treatments. To the right of the article, there are "Today in Cold, Flu, & Cough" sections with "SLIDESHOW" and "QUIZ" options. At the bottom, there is a "Recommended Related to Cold & Flu" section with a link to "Flu Shot Failure? Questions & Answers".

Step 3: Assess each competitor's business model.

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- Physical Facility
- Operating Hours
- Operating Model
- Scope of Services
- Technology
- Staffing Model
- Providers and Staff
- Reimbursement/Collections
- Marketing Tactics

Competitor Assessment Grid

Table 1: Sample Urgent Care Competitor Evaluation Grid

	My UCC	Competitor A	Competitor B
Number of Locations			
Physical Facility			
Street address			
Type of facility (e.g., freestanding, medical building)			
Size of facility			
Traffic count			
Size and visibility of exterior signage			
Ease of turning into/exiting the center			
Curb appeal of facility			
Interior condition/aesthetics of facility			
Adjacent tenants (driving traffic/visibility)			
Operating Hours			
Monday–Friday			
Saturday			
Sunday			
Holidays			
Operating Model			
Ownership (e.g., hospital, physician, corporate, etc.)			
Owner name(s)			
Investor name(s)			
Affiliations			
Certifications (e.g., UCAOA certification)			
Accreditations (e.g., JCAHO urgent care accreditation)			

Step 4: Identify competitor strengths/weaknesses

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- What can we learn from each competitor?
- What is each competitor doing that's unique?
- What is each competitor doing better than us?
- What are we doing better than each competitor?
- What is each competitor doing that we can improve upon?
- What products/services can we add to better serve our target customers?
- What systems/processes/technology can we implement?
- What's the reputation and turnover of the competitor's providers and staff?
- How do we respond to "non-traditional" or "emerging" competition?

Seek out and learn from best-in-class providers.

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CareNow—Web Check-in, Mobile App, Mass Marketing



Patient First—Integration of Primary Care, Hospital JV



Texas MedClinic—Real Estate, Signage, Mass Marketing



MedExpress—Scalability, Success in Secondary Markets

Signage Visibility

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Step 5: Differentiate from the Competition

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Differentiation is not...

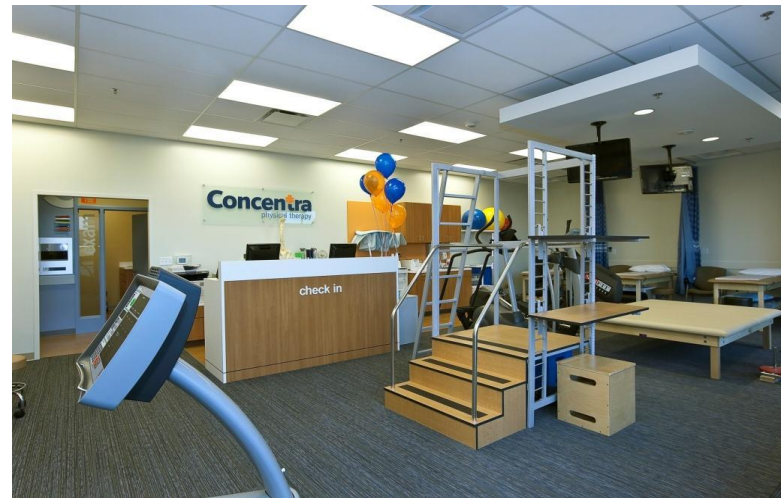
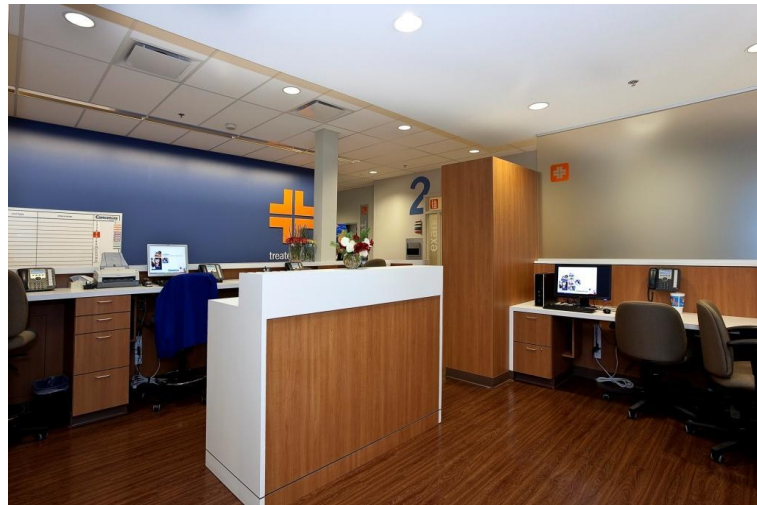
- What's important to doctors
- What patients can't see or understand
- Board certified physicians
- Digital x-ray, CLIA-certified lab, and EKG on-site
- Electronic medical record
- Walk-in care open nights and weekends
- In-network insurance provider

Differentiation is...

- What's important to patients
- Respectful, welcoming, skillful patient experience
- Great workplace culture
- Peaceful, aesthetically-pleasing environment
- Patient self-service technology
- Web registration, Wi-Fi, short waits
- Transparent self-pay pricing

Center Aesthetics

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Tangibles: Environment of Care

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Differentiate from the Competition, cont'd.

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- Identifying customer segments you can best serve
- Defining your service offering in terms that are important to those customers
- Developing a unique infrastructure to support delivery of your service offering
- Building your brand around what makes your center unique
- Communicating your brand message clearly and frequently

Our Opportunity...

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Research suggests consumers feel health care companies focus too much on their financial bottom lines, rather than a dedication to individual patient care. And they want a better patient experience.



The combination of a retail experience with quality health care is a unique offering.

Contact Information

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Alan A. Ayers, MBA, MAcc

Dallas, Texas

alanayers1@gmail.com

www.alanayersurgentcare.com