



# 2018 - 2019 Annual Report



Tom Anderson , Board President 2018 - 2019, and Sara Miller, President Elect 2018 - 2019

# A NOTE FROM AAPL BOARD PRESIDENT

The **American Association of Physician Liaisons** continues to be the only organization that is for physician liaisons and lead by physician liaisons. Each of the association’s active and engaged members have helped make AAPL the leading professional association for our field. The growth that AAPL has experienced is evident throughout the pages of our Annual Report, and this growth is also a testament to the importance of the liaison role in the everchanging healthcare landscape.

During the past year, AAPL sought out the feedback and advice of our members and engaged with our consultant partners and vendor sponsors. Utilizing this vast group of liaison expertise has afforded AAPL the opportunity to develop and advance the organization in a way that brings value to each and every one of our members.

Highlights of the past year include:

- ◆ Gained 106 new AAPL members
- ◆ Held two successful regional meetings (Portland, Oregon and Worcester, Massachusetts)
- ◆ Expanded Resource Library offerings
- ◆ Offered nine educational webinars
- ◆ Continued to grow AAPL’s social media presence

Excitingly, in the spring of 2019, AAPL completed its first ever benchmark survey! The success of this would not have been possible without our valued partnership with the Society of Healthcare Strategy and Market Development, Tiller-Hewitt Healthcare Strategies, and Barlow / McCarthy Physician Relationship Solutions. If you have yet to review this valuable resource, please make sure you take the time to explore the survey. You can find it in the member resources section of the website.

It has been my honor and privilege to serve as AAPL’s President. The advances that the organization has made over the past year would not have been possible without the support and guidance of our amazing Board of Directors. Thank you to each one of you for your dedication to AAPL and the liaison role. To each of our members, I wish you continued success in your careers.



## Mission Statement

The **American Association of Physician Liaisons** (AAPL) is an organization of healthcare professionals actively engaged in or supporting physician liaison activities in the health care field. The goal of AAPL is to bring those who function in this capacity together for educational and networking opportunities.



*Tom Anderson*


AAPL President 2018 - 2019

The **American Association of Physician Liaisons** is the only professional network that is powered by and developed for physician liaisons. AAPL consists of a geographically diverse group of healthcare professionals who are interested in establishing professional relationships with their peers from around the country. AAPL sponsors an annual educational conference that offers exciting, expert speakers who present information on subjects of relevant interest, aimed at improving the skills and capabilities of the Physician Liaison.


AAPL members work in 46 states across the country as:

- Physician Liaisons
- Vice Presidents of Physician Relations
- Hospital Sales and Marketing Team Members
- Business Development Liaisons
- Directors of Business Development
- Directors of Referral Development
- Business Development Managers

**3%**  
Children's Hospital




**23%**  
Academic Medical Center




**9%**  
For Profit



**7%**  
Free-Standing Center



**4%**  
General Acute Care




**44%**  
Not For Profit



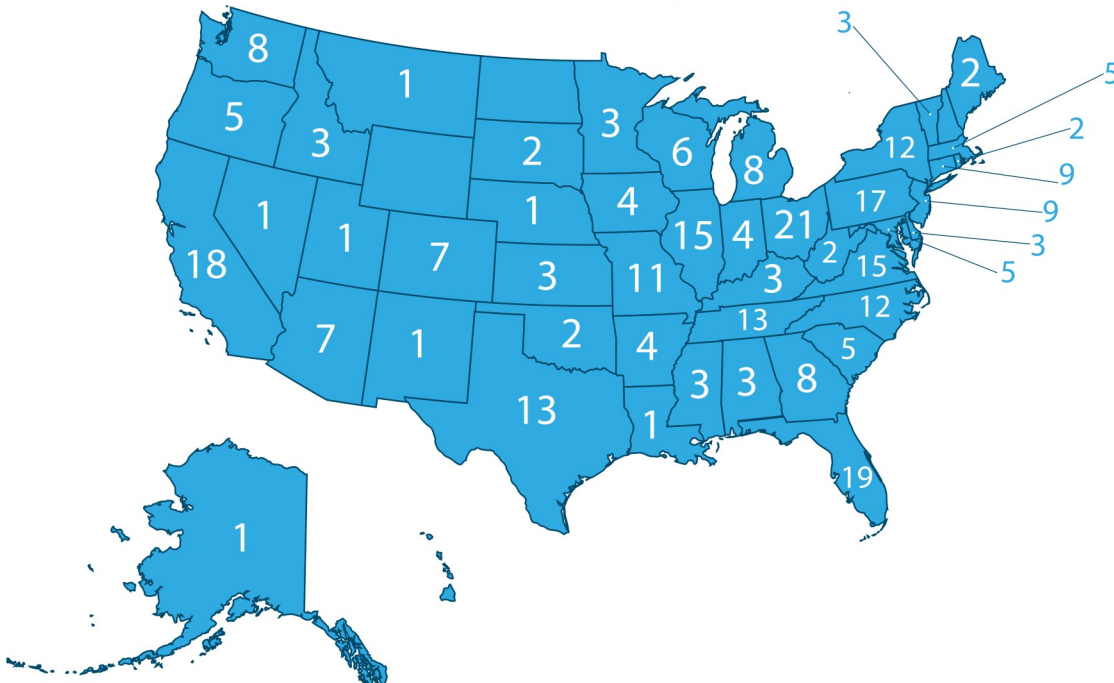
**3%**  
Specialty



**7%**  
Teaching Hospital



## Institutions by State



# AAPL MEMBERSHIP

Thank You to our  
Membership Committee Co-Chairs



**Amy Lynch**

Sarasota Memorial Health Care System  
Sarasota, Florida



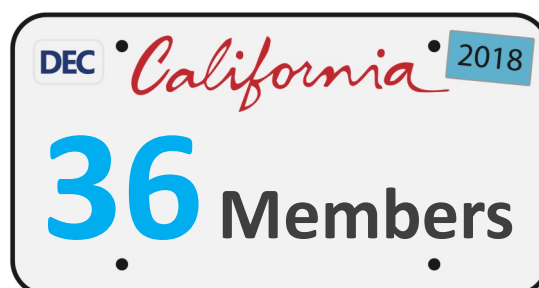
**Stephanie Niemi**

Main Line Health  
Radnor, Pennsylvania

## Membership by the Numbers

<b>Current Members:</b>	<b>530</b>
• New Members	106
• New Institutions	67
• 15+ Year Members	8
• Institutions	283
• States	46

***Congratulations California,*** for having more AAPL members  
than any other state!





**Purpose of Committee:**

- Define and communicate benefits of membership
- Help identify areas of growth
- Act as a resource for other committees

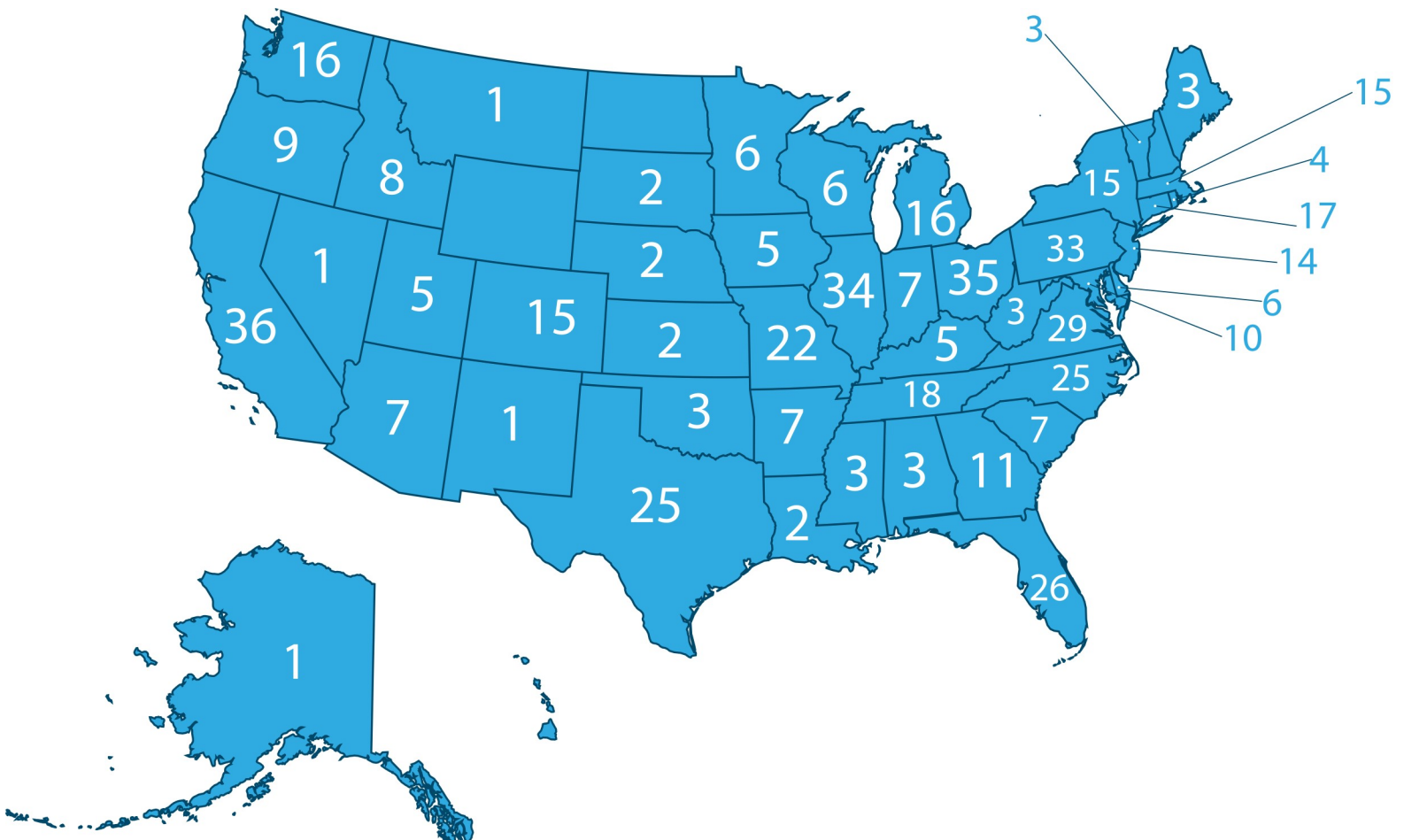
**Role/Responsibilities:**

- Participate in monthly conference calls
- Provide input and feedback
- Provide insight, experience, and action in membership recruitment

**Time Commitment:**

- 1 conference call/ month
- Outreach assignments/ special projects

## Members by State



# AAPL MEMBERSHIP

# 15<sup>Year</sup>

## AAPL MEMBER RECOGNITION

In recognition of AAPL members who have been active in membership and have supported the AAPL for more than 15 years. Thank you for your dedicated membership.

Carla Alexander  
Ann Hollingsworth  
Melanie Meyer  
Erica Monday  
Liz Nottingham  
Lyn Reed  
Danette Santana  
Pat Shallahamer

## Goals & Outcomes Membership Committee

### Gain average of 15 new members monthly

*Goal reached with average of 15½ new members monthly*

### Build a list of US hospitals for future recruitment efforts

*List has been secured with over 5000 hospitals*

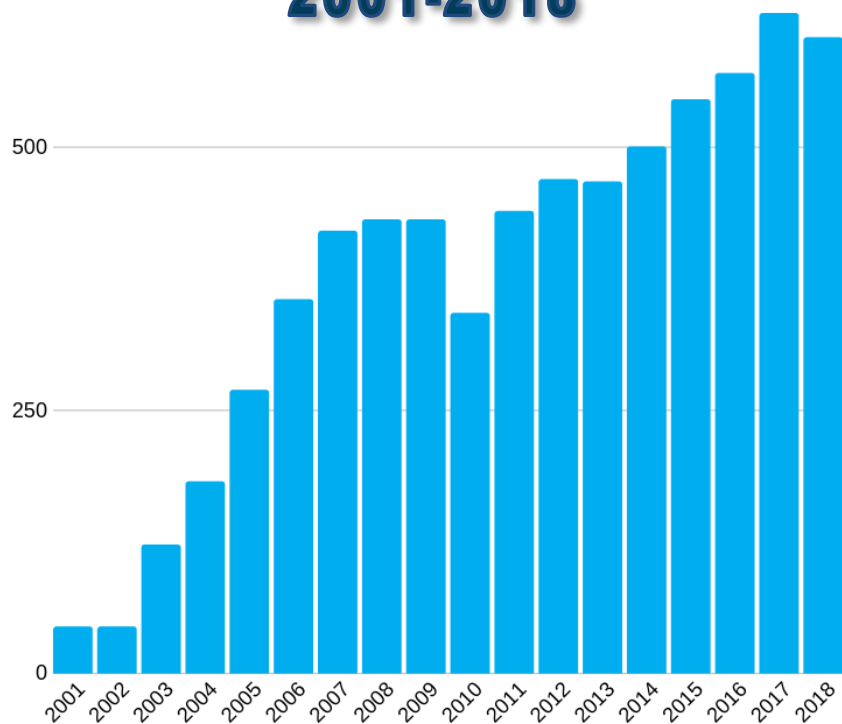
### Implement reliable tracking system to support membership recruitment efforts and progress

*Expanded use and access of AAPL database software*

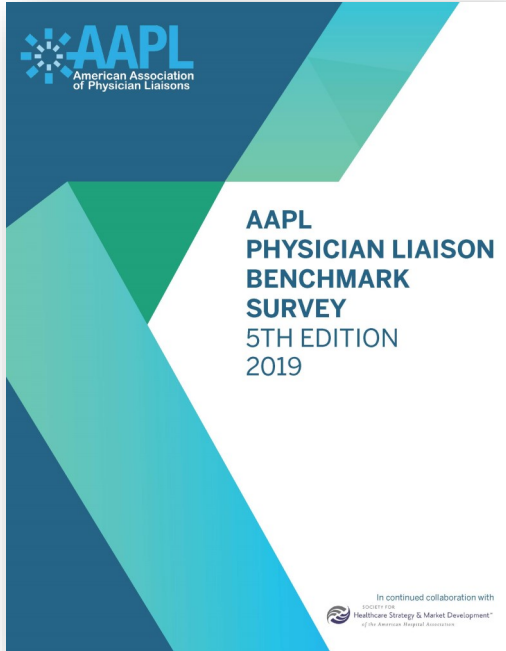
### Create and utilize new tactics to support increased member recruitment

*Created and mailed 500+ postcards to hospitals around the country to increase awareness of AAPL and its member benefits*

## AAPL Membership Growth 2001-2018



# Membership Resources



## The Value of a Liaison

**Building Strong Physician Relations Networks**  
Physician liaisons build valuable referral networks to drive sustainable operational growth. Liaisons educate, market, and communicate to connect their organization with the healthcare community.

Top 5 Functions of a Physician Liaison & how they facilitate these roles.

 <p><b>BUILD TRUST WITH REFERRING PHYSICIANS</b></p>	<ul style="list-style-type: none"> <li>Be responsive</li> <li>Provide useful info</li> <li>Ask for feedback</li> <li>Serve as a resource</li> <li>Be the voice of the physician</li> <li>Connect the entire office</li> <li>Ease referral process</li> <li>Be genuine</li> </ul>
 <p><b>PROMOTE INSTITUTIONAL UNIQUENESS</b></p>	<ul style="list-style-type: none"> <li>Understand competition</li> <li>Highlight clinical advances</li> <li>Connect to leadership</li> <li>Innovate ideas</li> <li>Provide customer service</li> <li>Inject culture</li> <li>Highlight accreditation</li> <li>Showcase community</li> </ul>
 <p><b>DEVELOP NEW BUSINESS RELATIONSHIPS</b></p>	<ul style="list-style-type: none"> <li>Conduct outreach</li> <li>Understand markets</li> <li>Promote new programs</li> <li>Communicate feedback</li> <li>Educate on new ideas</li> <li>Develop community</li> <li>Be a connector</li> <li>Monitor business climate</li> </ul>
 <p><b>POSITION PHYSICIANS AS EXPERTS</b></p>	<ul style="list-style-type: none"> <li>Develop public relations</li> <li>Provide satisfaction</li> <li>Distribute research</li> <li>Identify recognition</li> <li>Target value propositions</li> <li>Create accessibility</li> <li>Market practices</li> <li>Develop introductions</li> </ul>
 <p><b>BRIDGE REFERRING PHYSICIANS AND INSTITUTION</b></p>	<ul style="list-style-type: none"> <li>Facilitate access</li> <li>Address needs of parties</li> <li>Understand threats</li> <li>Provide single point of contact</li> <li>Share trends</li> <li>Eliminate barriers</li> <li>Advocate for physicians</li> <li>Coordinate with staff</li> </ul>

**Strengthening Reputations in the Community**  
Physician liaisons play an important role in the healthcare community. By participating in local events, streamlining communications, and maintaining open communication practices, liaisons are able to build a positive reputation for the institution.



## Top 10 Best Practices Strengthening The Reputation Of Your Institution




- PROMOTE**  
Promote organizational capabilities along with physician areas of interest, expertise and outcomes through media, outreach and educational opportunities
- PRESENT**

  - Build meaningful relationships — practice active listening, show empathy, be responsive
  - Coordinate CME events to highlight physician expertise
  - Partner with community to provide patient education opportunities
- PARTICIPATE**  
Seize the opportunities to align and engage with physician and senior leadership to assist with timely issue resolution and outreach strategies
- PROVIDE**  
Elevate your value by providing timely feedback to referring physicians while also delivering market intelligence to leadership
- PARTNER**  
Collaborate with internal stakeholders and referring physicians, creating a bridge between them
- PROFESSIONAL**  
Be polished and poised in all situations while representing the visions and values of your organization
- PERSONAL**  
Seek out personal and professional development opportunities to expand your network, industry knowledge and awareness of national best practices
- PROACTIVE**  
Anticipate the needs of key groups, hospitals and physicians by utilizing analytics combined with market intelligence
- PHYSICIAN FOCUSED**  
Position yourself to be the physician's go-to resource
- PATIENT FIRST**  
Never lose sight of your organization's mission to improve patient care

www.physicianliaison.com

## Physician Needs Analysis



Liaison Name   Date:	
Physician Name:	
Hospital   Organization:	
Office Location:	
Clinical Location:	
Administrative Assistant:	
Office Phone #:	
Mobile Phone #:	

- Tell me about your clinical interests and expertise. What differentiates you and your practice? What is your care philosophy?
- Are you interested in speaking at Grand Rounds/Dinner Lectures? Specify which. What topics are you interested in?
- Who are your key referring physicians?

AAPL Copyright 2018  
www.physicianliaison.com

# AAPL WEBINARS

Thank You to our  
Webinar Committee Co-Chairs



**Matt Hughes**

Nationwide Children's Hospital  
Columbus, Ohio



**Stephanie Pinkerton**

Arkansas Children's Hospital  
Lowell, Arkansas



## AAPL Offered 9 Educational Webinars July 2018 - June 2019

- ◆ **Making a Measurable Difference**  
*September 2018*
- ◆ **Outreach Tactics and Strategies that Equate to ROI**  
*November 2018*
- ◆ **A Data-Driven Approach to Service Line Growth**  
*November 2018*
- ◆ **Making Time Matter**  
*December 2018*
- ◆ **Field Approaches that Leaders Value Most**  
*February 2019*
- ◆ **Innovative Outreach Strategies to Improve Referral Relationships**  
*April 2019*
- ◆ **3 Strategies for Growth-Oriented Physician Outreach**  
*April 2019*
- ◆ **How to Build a Successful Physician Liaison Organization**  
*April 2019*
- ◆ **Leading Change in a Disengaged World**  
*June 2019*

# AAPL SOCIAL MEDIA

Thank You to our  
Social Media Committee Co-Chairs



**Jeremy Holt**

Spartanburg Regional Healthcare System  
Spartanburg, South Carolina



**Trent Hickes**

Cone Health  
Greensboro, North Carolina

**Like, Post, and Tag**  
Attendees of the 2019 Annual Conference enjoyed social media contests, blitzes and prizes!

- ◆ **Business Card Blitz** - earn points for every photo with conference attendees and their business card
- ◆ **Vendor Selfie Showdown** - take selfies with vendors; the bigger the group, the more points you earn



**884** likes  
@AAPLinc



**237** followers (Association Page)  
**3,063** members (Closed Group)  
American Association  
of Physician Liaisons



**268** followers  
@AAPL\_Network



**84** followers  
@AAPL\_Network



Custom Geofilter  
AAPL Conference 2019



# AAPL LIAISON CONNECT PROGRAM

Thank You to our  
*Liaison Connect Co-Chairs*



**Bonnie Little**

UNC Health Care  
Raleigh, North Carolina



**Paula Murphy**

St. Louis Children's Hospital  
St. Louis, Missouri

*"One of the greatest values of mentors is the ability to see ahead what others cannot see and to help them navigate a course to their destination."*

- John C. Maxwell



The **Liaison Connect** Program fosters professional growth and development by connecting more experienced AAPL members (mentors) with members who desire to grow those same skills (mentee). Participants of this dynamic program boast improved skill sets, better networking skills, as well as closer connections to their AAPL colleagues across the country.

AAPL mentors have 5 years or more of liaison experience in the work place, with a desire to share their honed liaison skills. Any AAPL member may be a mentee; a desire to improve and grow in their liaison career is the only requirement. During 2018-2019, **Liaison Connect** is proud to boast:

- ◆ 21 Mentors
- ◆ 17 Mentees
- ◆ 15 Program Matches
- ◆ New questionnaire developed to more effectively match new Liaisons and Manager/Directors
- ◆ Developed **Mentoring Mingle** event for the 2019 AAPL Annual Conference



# AAPL PHYSICIAN LIAISON BENCHMARK SURVEY

Thank You to our  
Benchmark Ad Hoc Chair

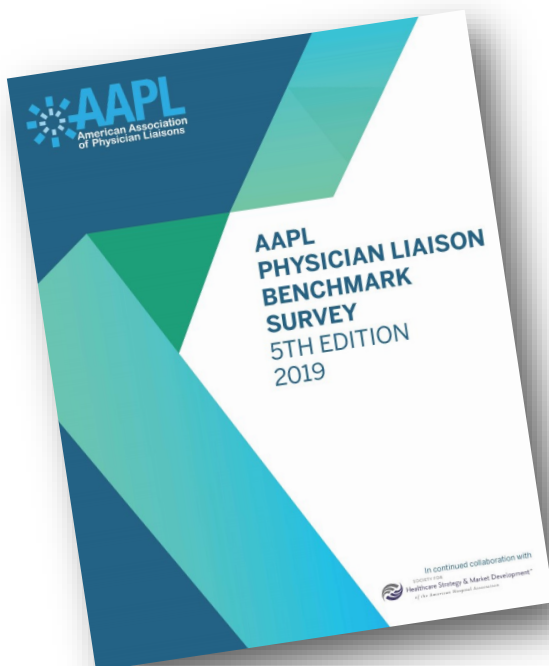


**Gail Chellis**

Shriners Hospital for Children  
St. Louis, Missouri

The Physician Liaison role continues to evolve with the transformation of healthcare. While some of the basic tenets of our function remain the same, we find ourselves taking on additional and/or different duties as many health systems and free-standing facilities shift to value-based medicine. AAPL's 2019 benchmarking survey and report provides trending information in the areas of staffing, compensation, changing job focus and potential challenges. Where possible, the current survey compares data with that of previous surveys performed by the Society of Healthcare Strategy and Market Development (SHSMD). Overall, this information provides an understanding of peer programs and identifies potential opportunities to help revise current programs.

The survey reveals that today's physician liaison programs must examine challenges, strategies and solutions vital to succeeding in today's intensely competitive healthcare environment. To be successful, programs must be nimble enough to adapt to the changes in healthcare while continuing to focus on and improve our relationships with doctors in creative ways.



- ◆ Conducted in March 2019 in collaboration with:
  - Society for Healthcare Strategy and Market Development
  - Tiller Hewitt Healthcare Strategies
  - Barlow / McCarthy Physician Relationship Solutions
- ◆ Trending information in the areas of:
  - Staffing
  - Compensation
  - Changing job focus
  - Potential challenges in the future
- ◆ Total of 272 respondents

# AAPL 2019 ANNUAL CONFERENCE SALT LAKE CITY, UTAH

Thank You to Our  
Program Planning Committee Chair



**Sara Miller**

Saint Alphonsus Health System  
Boise, Idaho

Thank you to all who joined AAPL in Salt Lake City, Utah at The Grand America Hotel in June 2019! It was a thrill to welcome **101** first time attendees, **54** new AAPL members, **154** health systems, and a total of **265** attendees!





# E<sub>XP</sub>LORING *new frontiers*





# AAPL REGIONAL MEETING PORTLAND, OREGON



- ◆ Thank you to our host, Oregon Health & Science University
- ◆ 38 Attendees
- ◆ 24 Health Systems represented





# AAPL REGIONAL MEETING WORCESTER, MASSACHUSETTS

## Regional Meeting Worcester, Massachusetts



American Association of Physician Liaisons - Regional Meeting  
Wednesday, November 7, 2018 - 9:00am - 3:30pm  
UMass Memorial Health Care

- ◆ Thank you to our host, UMass Memorial Health Care
- ◆ 34 Attendees
- ◆ 24 Health Systems represented



# 2018 - 2019 AAPL FINANCIAL REPORT

Thank You to our  
Treasurer

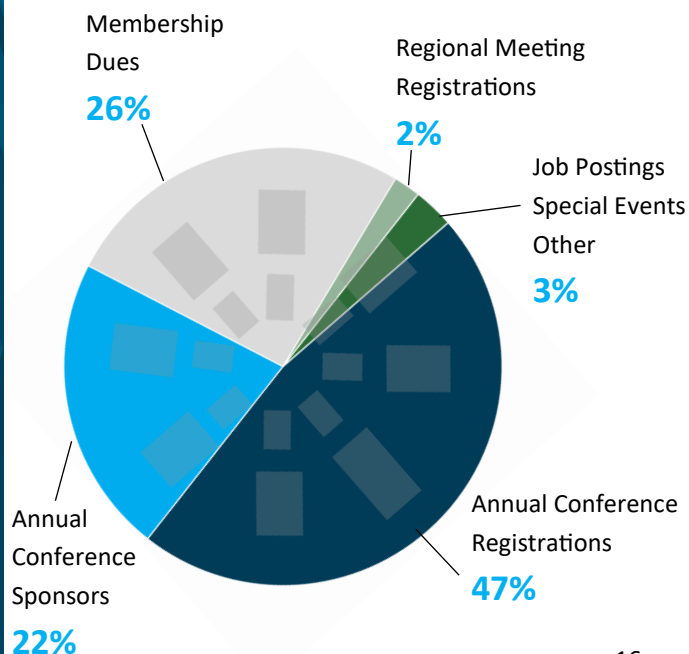


**Amy Lynch**

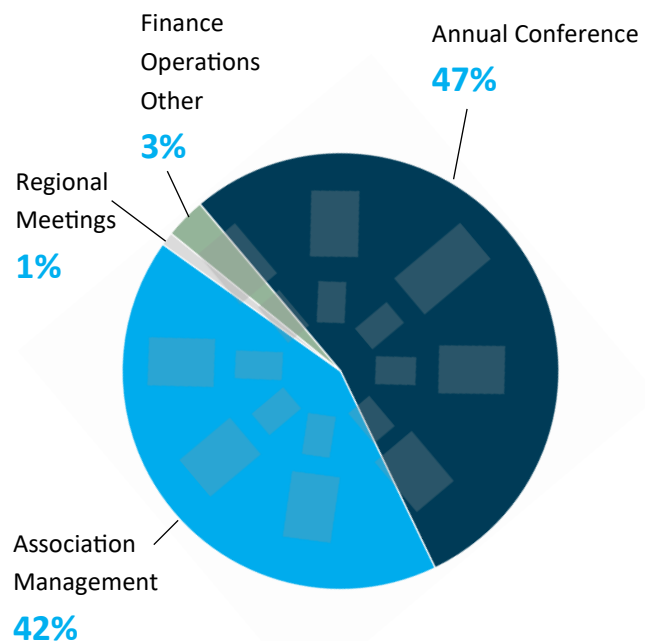
Sarasota Memorial Health Care System  
Sarasota, Florida

- ◆ AAPL's financial records are professionally managed by accountants at our Management Company, Kassalen Meetings and Events, LLC.
- ◆ All bank accounts and credit card transactions are reconciled at the end of each month.
- ◆ The Board is provided with monthly financial reports such as Balance Sheet, Profit and Loss Statement, Actual vs. Budget, Profit and Loss Details.
- ◆ At the end of 2018, the Balance Sheet indicates AAPL's net worth as \$89,586. That means money in our bank accounts and reserves, minus any outstanding liabilities.
- ◆ AAPL is classified as a non-profit 501(c)6 corporation.
- ◆ Certified Tax Accountant reviews AAPL financial accounts annually.
- ◆ The AAPL Treasurer, Board, and Management Company use historical data and planned initiatives to develop a budget for the upcoming year.

## Revenue FY 2018-2019



## Expenses FY 2018-2019





# AAPL Income and Expenses

## July 1, 2018 - June 30, 2019

	7/1/2018 - 6/30/2019
<b>Revenue</b>	
Annual Conference Registrations	\$130,500
Annual Conference Sponsors	\$59,300
Membership Dues	\$71,350
Regional Meeting Registrations	\$6,125
Job Postings, Special Events, Other	\$7,980
<b>TOTAL REVENUE</b>	<b>\$275,255</b>
<b>Expenses</b>	
Annual Conference	\$142,724
Association Management	\$111,066
Regional Meetings	\$4,447
Finance, Operations, Other	\$8,436
<b>TOTAL EXPENSES</b>	<b>\$266,673</b>
<b>Net Change</b>	<b>\$8,582</b>

# 2018 - 2019 Board of Directors



Tom Anderson  
*President*



Sara Miller  
*President-Elect*



Gail Chellis  
*Past President*



Amy Lynch  
*Treasurer*



Paula Murphy  
*Secretary*



Trent Hickee  
*Board Member  
at Large*



Jeremy A. Holt  
*Board Member  
at Large*



Matt Hughes  
*Board Member  
at Large*



Bonnie Little  
*Board Member  
at Large*



Stephanie Niemi  
*Board Member  
at Large*



Stephanie Pinkerton  
*Board Member  
at Large*



Beth A. Kassalen  
*Executive Director*



**Beth Kassalen**

Kassalen Meetings and Events  
Pittsburgh, Pennsylvania

**AAPL** is investigating ways of increasing our **member reach and our organization's visibility**. Engagement is the key to furthering both goals. This past year we have reached out to physician liaisons using a multitude of approaches such as electronic communications, snail mail, and advertising. We've explored new connections with liaisons in independent and free-

standing facilities, vein clinics, dermatology clinics, and dental groups while maintaining our connections to liaisons at academic medical centers, children's hospitals, community, and private hospitals.

**Engagement** can have many levels of service, and active participation was achieved at the AAPL 2019 Annual Conference through social media. AAPL had a presence on Facebook, Twitter, Instagram, LinkedIn, and we are delving into SnapChat this year and even have our own SnapChat Filter which was available during the conference. There were two live engagement contests during the Annual Conference: #BusinessCardBlitz and #SelfieChallenge. We had many members sign up, follow, like, post, engage and win prizes.

Engagement and **participation** allow you to make a difference, contribute to the greater good, strengthen the network, and have an impact on the physician liaison profession. Participating on any of the AAPL Committees, or its Board of Directors, not only helps the organization but also provides liaisons with the tools to learn, grow, and take away best practices to make you a better person and liaison. Board and Committee participation provides each member to have a seat at the table, hone your analytic skills, and gain valuable leadership experience to build your resume.

Another way to engage with your AAPL colleagues is to take advantage of our unique **mentoring program**

**Liaison Connect**. If you are new to the field, apply to be matched with a Mentor. If you are a seasoned liaison or in a higher-level position, consider serving as a Mentor and be matched with a Mentee. The commitment is minimal, much like sitting down and having a cup of coffee while having a detailed discussion about the role and importance of the physician liaison. Interaction may be face to face or via the phone or Skype once a month. AAPL provides you with ideas to keep the conversation moving and the structure to make the experience rewarding for both the Mentor and the Mentee.

Consultants serving the physician liaison-related fields, and vendors and sponsors participating in our Annual and Regional Meetings deserve our **thanks**. Each of them provides incredible additional resources for liaisons. They increase our access to articles, blogs, videos, training sessions, hands-on software tutorials, data analytic systems, dashboards, referral materials and more. These companies also provide a pathway for exploring new frontiers. They provide financial support to AAPL so that your registration fees remain relatively affordable compared to other industry-related conferences. The AAPL Board continues to search for new ways to collaborate with our consultants and sponsors, and AAPL is discovering new ways that these partnerships can help us achieve our strategic goals.

Collaboration is most evident with the **Benchmark Survey** where members of Barlow/McCarthy and Tiller Hewitt & Associates participated with our liaison-based committee to bring our members a valuable resource.

# EXECUTIVE DIRECTOR REPORT

Lastly, increasing income is a goal identified in the [AAPL Strategic Plan](#). Running AAPL is like running a business and our network needs to remain strong, expand, and achieve all goals and expectations set forth in our Strategic Plan and in the minds of our members. AAPL has two main sources of income: membership dues and annual conference profit. We know there are many more liaisons across the country who either have not heard of AAPL or have not found the opportunity to be exposed to our vast network. Increasing membership numbers will increase AAPL's income, as will increasing attendance at our regional and annual conferences. Our best recruitment campaign involves YOU, our members. Spread the word about AAPL, invite a colleague to participate in an AAPL activity, educate your supervisor of the benefits of having your entire team be AAPL members. If you are willing to embark on a new journey, I would like to hear from you. Contact me at [beth@kassalen.org](mailto:beth@kassalen.org).

## Top 10 Reasons to Serve in AAPL Leadership

- #1** Networking! Stay on top of your field
- #2** Learn to drive change through team involvement
- #3** Learn best practices
- #4** Professional development
- #5** Understand budgets, strategic plans, and revenue generation
- #6** Engage in stimulating conversations with professionals and continue your own education
- #7** Share and discover new ideas that can be put into practice immediately
- #8** Support your professional field organization
- #9** Grow as a leader; grow as a team member
- #10** Show your AAPL pride!

Beth's "Call to Action"  
- Get Involved -



Your work will benefit others throughout the AAPL Network.  
Your work will make a difference to the profession.

You, personally, will benefit from the involvement. On the Board, you will be exposed to C-suite level activities, decision-making techniques, financial analysis and negotiation skills at a minimum. Serving on a committee, you will hone your team-building abilities, perfect your techniques as an influencer, and be the driver of change and innovation. There is no limit to the opportunities you can gain by stepping into a leadership role for your professional organization – AAPL! Thank you.

*-Beth Kassalen*

AAPL Executive Director



# THANK YOU TO OUR 2018 - 2019 SPONSORS

