



2019 - 2020 ANNUAL REPORT



A NOTE FROM AAPL PRESIDENT



Sara Miller

**AAPL President
2019 - 2020**

The American Association of Physician Liaisons continues to be the only organization that is for physician liaisons and lead by physician liaisons. Each of AAPL's members have helped make it the leading professional association for our field. AAPL's growth is evident and is a testament to the importance of the liaison role in the everchanging healthcare landscape.

During the past year, and particularly in recent months, the AAPL continues to evolve to meet the needs of our members and their associated healthcare institutions. These are unprecedented times, and we continue to engage our members, consultant partners and vendor sponsors in order to elevate best practices through new and existing member activities. Many of us find ourselves working remote, supporting new projects, exploring new strategies and supporting our institutions using new and innovative outreach ideas. Now more than ever, we are looking to our peers to think outside of the box to ensure we are a value add to our healthcare institutions. 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 one of our members.

Highlights of the past year include:

- ◆ 223 new AAPL members (205% over prior year)
- ◆ 22 Community COVID Chats
- ◆ Successful regional meeting in Columbus, Ohio
- ◆ Expanded Resource Library offerings
- ◆ 10 educational webinars
- ◆ Continued growth of AAPL's social media

Although the 2020 AAPL Conference was cancelled to ensure the safety of our members and valued partners, weekly AAPL Community COVID Chats began on March 31st, 2020. To date, close to 400 members have participated in one or more chats. We appreciate our vendor partners who have supported the organization by facilitating the AAPL chats and we look forward to their continued partnership.

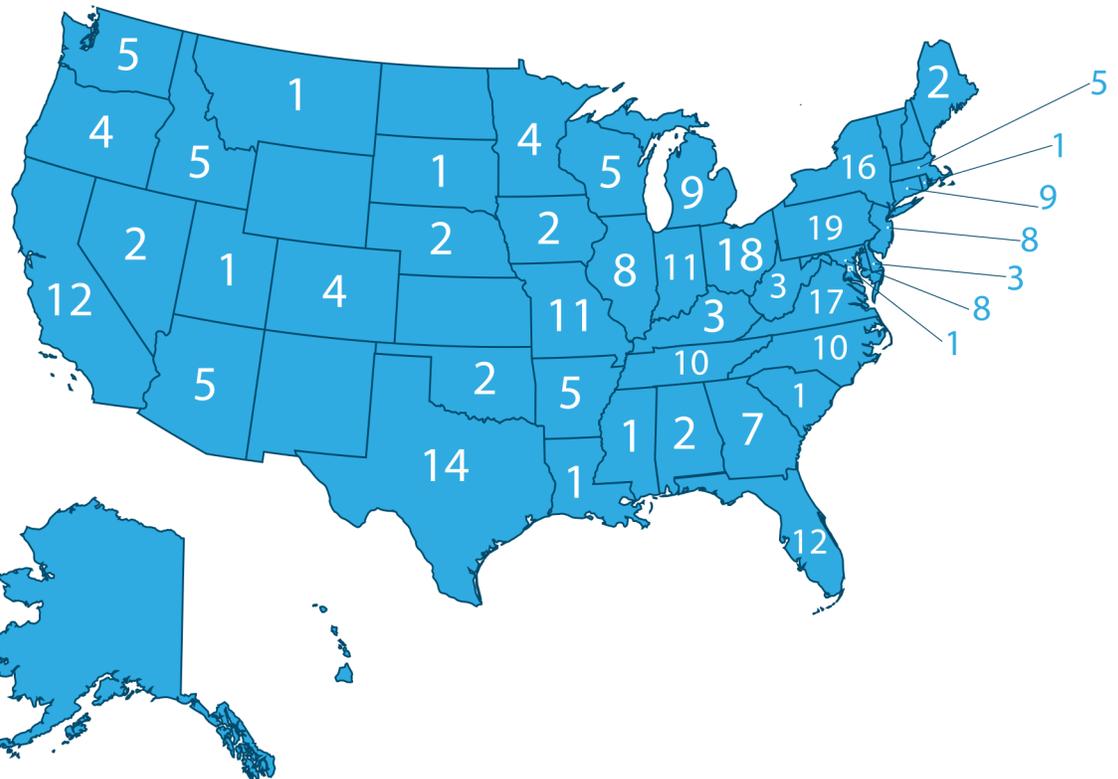
Since joining the AAPL in 2012, I have had the pleasure of meeting liaisons from across the country and I am continuously impressed by their dedication and ingenuity. It is an honor to call you friends and it has been a privilege to serve as AAPL's President. Our successes could not have happened without the hard work and commitment of our incredible committee members and Board of Directors. To each of you, thank you for your friendship and devotion to AAPL. To each of our members, I wish you good health and continued success in both your professional and personal lives and I encourage you to lean in and join one of our incredible committees.

Please make plans now to join us for the [Wired Workshop](#) on October 21-22, 2020. We will be participating in strategic planning post-COVID, physician relations program development, adapting to change, and more! I look forward to seeing you there.

36%

Academic
Medical
Center

Institutions by State



24%

Community /
Private
Hospitals

15%

Children's
Hospital

14%

Specialty

11%

Free-Standing
Center

AAPL members work in 43 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

Thank You to our
Membership Committee Co-Chairs



Amy Lynch
Sarasota, Florida



Paula Murphy
St. Louis, Missouri

Congratulations!





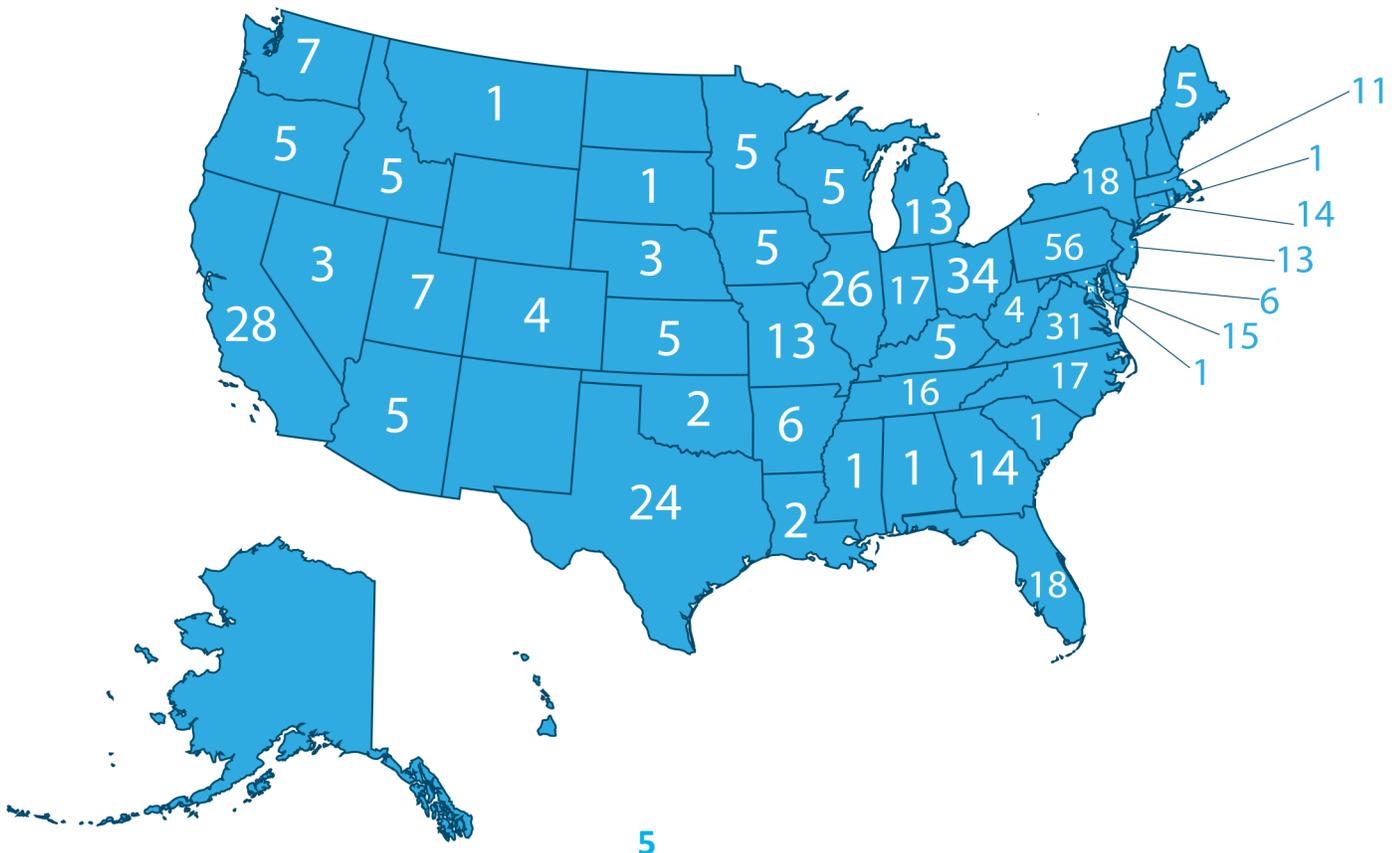
Membership by the Numbers

Current Members:	488
• New Members	223
• Renewed Members	311
• 10+ Year Members	8
• Institutions	398
• States	43

Goals & Outcomes

- ◆ **Continue outreach to non-AAPL members**
Goal reached with 233 new members in Fiscal Year 2019
- ◆ **Create membership tangibles to promote AAPL visibility**
Member Certificate and Pin were created
- ◆ **Support outreach using postcards, letters, and advertising**
Postcards and collaterals were updated with 2020 information
- ◆ **Target prospects in areas surrounding annual and regional meetings**
Increased engagement resulting in new members, especially with children's hospitals and oncology liaison programs

Members by State



Congratulations & Thank You to Ann Hollingsworth!



Ann is retiring this year after 33 years as Director of Physician Liaisons at Vanderbilt University Medical Center. AAPL thanks her for her service and dedication as

- ◆ AAPL's 1st President
- ◆ AAPL Founding Member
- ◆ and 20-year AAPL Membership!

"I was one of the original 10 Physician Liaisons who came together back in the 1990's to share our challenges, war stories, strategies, wounds, successes and not-so-successful "learning experiences". By 1999, we determined that a more structured organization was needed, so in 2000, our original Charter, Bylaws and the name "AAPL" were incorporated, and Board Members were elected,. It was my honor and privilege to serve as the 1st AAPL President. I am overwhelmed with gratitude for the many opportunities offered me by AAPL, the lifelong friendships formed, and memories of fun times. I wish AAPL continued success in support of each Physician Liaison, and I wish each of you great success in your professional endeavors. Most of all, I wish you, individually and collectively, strength, contentment and peace in your personal lives, something we all need in these unusual times. The years pass so quickly!"

15 *Year*

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.

*Ann Hollingsworth
Lorraine Placido
Pat Shallahamer*

*Catherine Mikelson
Lyn Reed
Ellen Steward*

*Liz Nottingham
Danette Santana*

Thank You to our
Resource Development
Committee Chair



Tom Anderson
Worcester, Massachusetts

COVID-19 COMMUNITY CHATS

Share. Listen. Support.



AAPL is proud of the timely offering of **22 COVID Community Chats** through June 2020. These small-group chats enabled the sharing of experiences, best practices, and engagement among AAPL members in order to support one another during this unprecedented pandemic.

To-Do 2019-2020

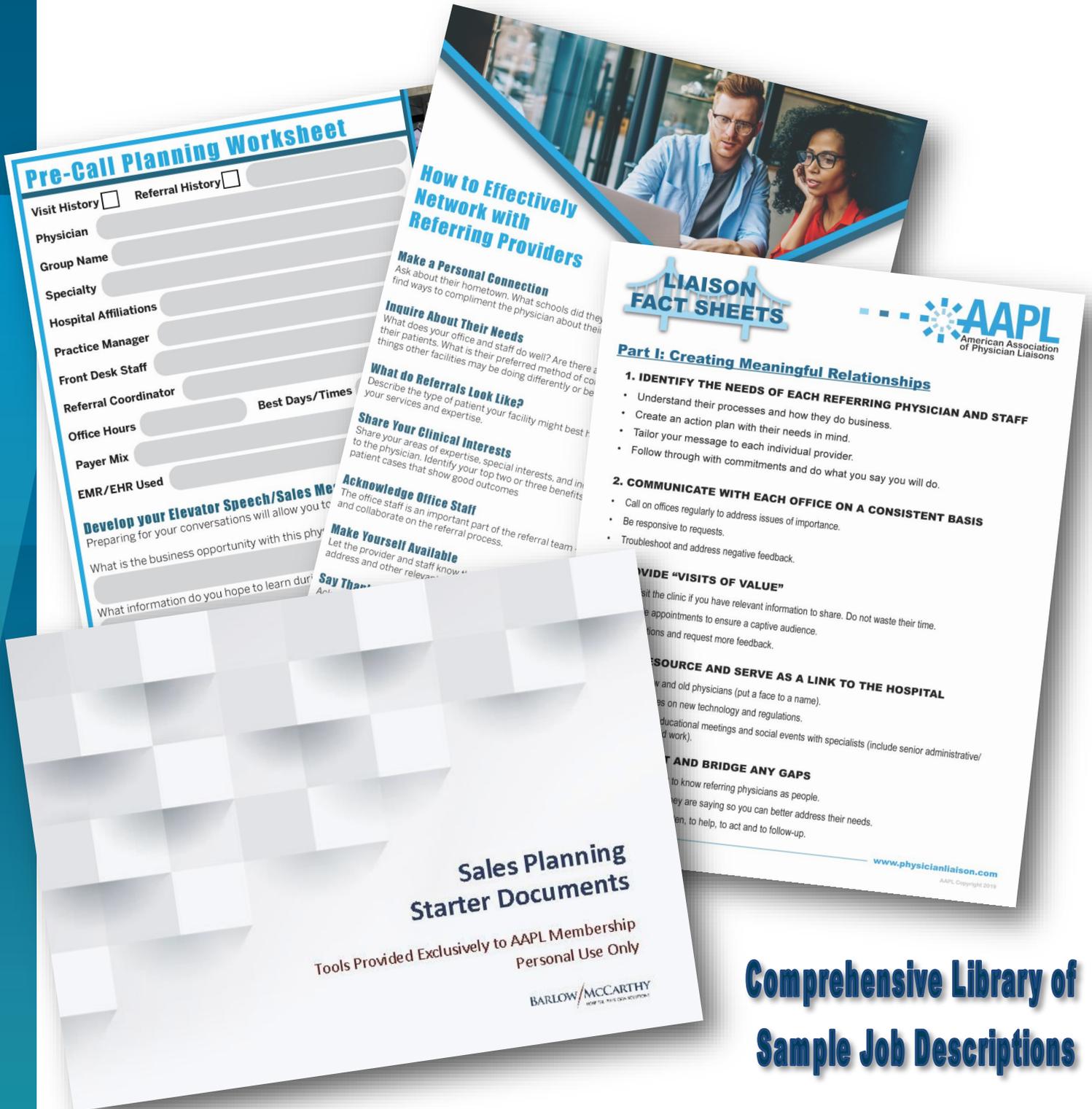
Develop pre-call planning tool ✓

Update job description toolkit ✓

Develop tool to assist with referring providers ✓

Create best practice tools for post-COVID outreach ✓

Member-Only Resources 2019-2020



Pre-Call Planning Worksheet

Visit History Referral History

Physician _____

Group Name _____

Specialty _____

Hospital Affiliations _____

Practice Manager _____

Front Desk Staff _____

Referral Coordinator _____

Office Hours _____ Best Days/Times _____

Payer Mix _____

EMR/EHR Used _____

Develop your Elevator Speech/Sales Message

Preparing for your conversations will allow you to _____

What is the business opportunity with this physician? _____

What information do you hope to learn during your call? _____

How to Effectively Network with Referring Providers

Make a Personal Connection
Ask about their hometown. What schools did they attend? Find ways to compliment the physician about their patients.

Inquire About Their Needs
What does your office and staff do well? Are there any challenges? What is their preferred method of communication? Are there things other facilities may be doing differently or better?

What do Referrals Look Like?
Describe the type of patient your facility might best serve.

Share Your Clinical Interests
Share your areas of expertise, special interests, and innovations with the physician. Identify your top two or three benefits for your services and expertise.

Acknowledge Office Staff
The office staff is an important part of the referral process. Thank them and collaborate on the referral process.

Make Yourself Available
Let the provider and staff know you are available to address and other relevant questions.

Say Thank You
Actively thank the provider and staff for their time and assistance.

LIAISON FACT SHEETS

Part I: Creating Meaningful Relationships

- 1. IDENTIFY THE NEEDS OF EACH REFERRING PHYSICIAN AND STAFF**
 - Understand their processes and how they do business.
 - Create an action plan with their needs in mind.
 - Tailor your message to each individual provider.
 - Follow through with commitments and do what you say you will do.
- 2. COMMUNICATE WITH EACH OFFICE ON A CONSISTENT BASIS**
 - Call on offices regularly to address issues of importance.
 - Be responsive to requests.
 - Troubleshoot and address negative feedback.

PROVIDE "VISITS OF VALUE"

Visit the clinic if you have relevant information to share. Do not waste their time. Schedule appointments to ensure a captive audience. Ask for feedback and request more feedback.

BE A RESOURCE AND SERVE AS A LINK TO THE HOSPITAL

Connect new and old physicians (put a face to a name). Educate on new technology and regulations. Attend educational meetings and social events with specialists (include senior administrative/clinical staff and work).

IDENTIFY AND BRIDGE ANY GAPS

Take the time to know referring physicians as people. Listen to what they are saying so you can better address their needs. Offer assistance, to help, to act and to follow-up.

Sales Planning Starter Documents

Tools Provided Exclusively to AAPL Membership
Personal Use Only

BARLOW/MCCARTHY
HOW TO MAKE YOUR CALLS

www.physicianliaison.com
AAPL Copyright 2019

**Comprehensive Library of
Sample Job Descriptions**

Thank You to our
Webinar Committee Co-Chairs



Matt Hughes

Columbus, Ohio



Stephanie Niemi

Radnor, Pennsylvania

10 Educational Webinars

- ◆ Making the Marriage Work Between Marketing and Liaisons
- ◆ Stark Law Update
- ◆ Leveraging Big Data for Targeted Outreach
- ◆ The Art of Playing Dumb
- ◆ Self-care, Resilience and the Passionate Pursuit of Purpose
- ◆ How Technology Has Changed the Role of the Physician Liaison
- ◆ Maximizing Your Daily Energy and Dealing with Negativity
- ◆ Everybody Sells—Supporting Secondary Service Lines and Physicians
- ◆ DIY Physician Growth Strategies: Using Data to Do It Yourself
- ◆ Leading Change in a Disengaged World

Thank You to our
Sponsors for their Webinar Presentations

DIAMOND LEVEL



PLATINUM LEVEL



GOLD LEVEL



SILVER LEVEL



Thank You to our
Communications Committee Co-Chairs



Jeremy Holt

Spartanburg, South Carolina



Trent Hicke

Greensboro, North Carolina

Our 2019-2020 Goal was
Like, Post, and Tag!

AAPL's 4 social media channels saw increases of engagement!



452 followers

939 likes

@AAPLinc



479 followers (Association Page)

3,091 members (Closed Group)

American Association
of Physician Liaisons



279 followers

@AAPL_Network



112 followers

131 posts

@AAPL_Network

Thank You to our
Liaison Connect Mentorship Co-Chairs



Bonnie Little

Raleigh, North Carolina



Sarah Latorre

Worcester, Massachusetts

"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 2019-2020, **Liaison Connect** is proud to announce:

- ◆ 18 Mentors
- ◆ 18 Mentees
- ◆ 12 Program Matches
- ◆ Hosted successful **Mentoring Mingle** event at the 2019 AAPL Annual Conference for 28 members

Thank You to Our
Program Planning Committee Co-Chairs



Lyn Reed

Indianapolis, Indiana



Loren Van Ostrand

New Haven, Connecticut

AAPL 2020 Annual Conference is Rescheduled for Spring 2022

The AAPL Annual Conference was originally scheduled for June 2020 in Atlanta, Georgia. After much deliberation and discussion, it was decided to reschedule it for Spring 2022.

- ◆ All registrations were refunded
- ◆ Thanks to strong relationships with our sponsorship partners, many committed to moving their sponsorship from 2020 to 2022
- ◆ Areas of Focus:
 - Children's Hospitals and Pediatric Liaison Focused Track
 - Interactive Sales Training
 - Leadership Intensive
 - Physician Perspectives and Panel Discussion
 - Analytics and Data Management Best Practices
 - Networking Opportunities



ANNUAL CONFERENCE

Thank You to Our
AAPL 2020 Annual Conference Sponsors

DIAMOND LEVEL



PLATINUM LEVEL



GOLD LEVEL



SILVER LEVEL



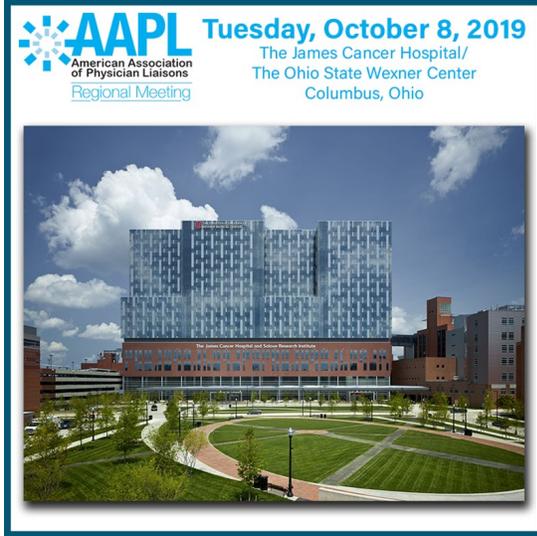
AAPL
American Association
of Physician Liaisons

2022 Annual Conference
June 15 - 17, 2022

A T L A N T A

Intercontinental Hotel Buckhead

AAPL REGIONAL MEETING COLUMBUS, OHIO



Thank You to our Host

The James



- ◆ October 8, 2019 in Columbus, Ohio
- ◆ 70 Attendees
- ◆ 32 Health Systems represented



Thank You to our
Treasurer

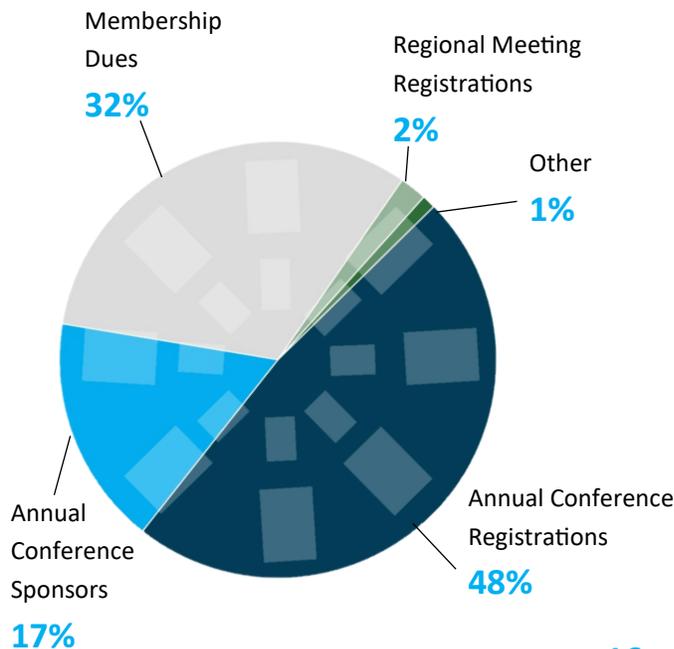


Amy Lynch

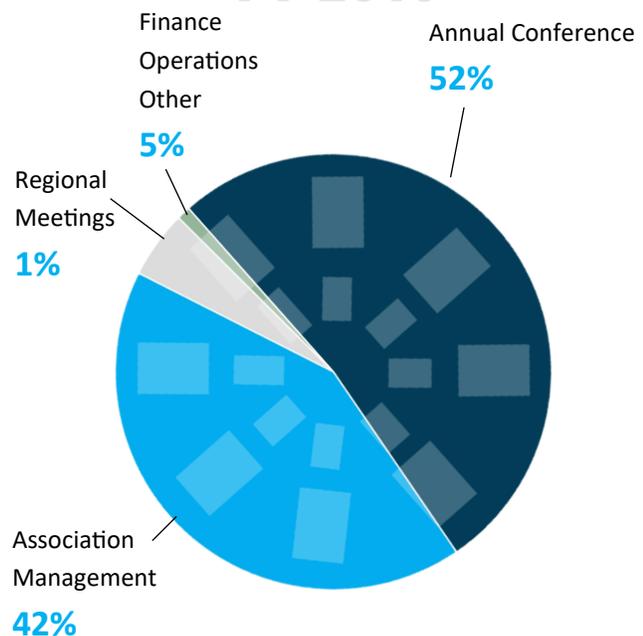
Sarasota, Florida

- ◆ AAPL’s Fiscal Year runs January 1, 2019 - December 31, 2019
- ◆ 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.
- ◆ 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 2019



Expenses FY 2019



AAPL Income and Expenses Fiscal Year 2019 vs 2018

	1/1/2019 - 12/31/2019	1/1/2018 - 12/31/2018
Revenue		
Annual Conference Registrations	\$148,270	\$130,500
Annual Conference Sponsors	\$54,400	\$59,300
Annual Conference Special Event	\$1,665	
Membership Dues	\$98,173	\$71,350
Regional Meeting Registrations	\$5,230	\$6,125
Job Postings, Interest, Other	\$1,015	\$7,980
TOTAL REVENUE	\$308,753	\$275,255
Expenses		
Annual Conference	\$138,338	\$142,724
Association Management	\$112,473	\$111,066
Regional Meetings	\$2,305	\$4,447
Finance, Operations, Other	\$12,176	\$8,436
TOTAL EXPENSES	\$265,292	\$266,673
Net Change	\$43,461	\$8,582

2019 - 2020 Board of Directors



Sara Miller
President



Lyn Reed
President-Elect



Tom Anderson
Past President



Amy Lynch
Treasurer



Loren Van Ostrand
Secretary



Trent Hicke
*Board Member
at Large*



Jeremy A. Holt
*Board Member
at Large*



Matt Hughes
*Board Member
at Large*



Sarah Latorre
*Board Member
at Large*



Bonnie Little
*Board Member
at Large*



Stephanie Niemi
*Board Member
at Large*



Beth A. Kassalen
Executive Director

EXECUTIVE DIRECTOR REPORT



Beth Kassalen

**Kassalen Meetings
& Events**

The American Association of Physician Liaisons Board, members, and staff will always remember 2020, along with the rest of the world. As the coronavirus COVID-19 wreaked havoc on the public, healthcare systems, state and national government entities, our professional organization had to dig down to regroup and strategize. The Board quickly realized that the pandemic was impacting our members' jobs, roles, and liaison-team activities. Much of our membership was suddenly working remotely and no longer visiting physician offices.

AAPL has done a fantastic job **pivoting quickly** to offer our members strategic resources during this unprecedented time. Teams were disbanded or furloughed, and yet others were redistributed throughout their healthcare systems doing work collecting PPE, rescheduling elective procedures, and checking employee and patient temperatures.

Without a doubt, AAPL's main accomplishment this year is the offering of **COVID Community Chats**. As of the virtual business meeting held at the end of June, more than 22 online networking chats had been offered, many hosted by our tireless Past President, Tom Anderson. AAPL provided a place and time for more than 300 members to connect, share their personal and business COVID experiences, discuss best practices, exchange ideas for coping and remaining connected with their physicians, and finally, discussions about how to prepare for **conducting business in a new way**.

The Annual 2020 AAPL Conference scheduled for Atlanta, Georgia was postponed until 2022 at the same venue. Due to the financial impact of COVID-19 on hospital systems, and the uncertainty of the spread, the AAPL Board determined that the organization should hold virtual offerings in Fall 2020, perhaps again in Spring 2021, and then resume the in-person conference the following year. Our strategy is strong for 2020, offering key lectures digitally in October. AAPL also worked to keep its sponsors and vendors engaged by offering them virtual exposure, either at the Fall conference, through webinars, or their participation on Community chats. AAPL is grateful to those sponsors who were able to stand by our side, continue their financial support, and provide key product information or leadership insight to our members.

AAPL members can be proud that their professional organization has evolved into a **resilient machine**, assessing the current needs of the membership as the pandemic raged on. Financially, AAPL had some money saved for a rainy day. With the loss of the annual conference revenue in 2020, the Board scaled back on many expenses, ensuring that low or no costs membership benefits and resources remain visible.

EXECUTIVE DIRECTOR REPORT

Members continued joining AAPL as many found that working remotely meant that they needed a larger support network. Membership outreach continued and members continued receiving membership certificates and personal welcomes. Social media kept announcements and new resources visible to our members. The Forum at www.physicianliaison.com allowed members to **communicate** with each other by posting questions and answers from colleagues. AAPL explored special interest groups for oncology-focused liaisons as well as those working in children's hospitals.

To wrap up the end of June, AAPL said goodbye to four long-standing board members, welcomed three new board members, and the business meeting allowed Sara Miller to 'pass the gavel' to Lyn Reed who will navigate AAPL 2020 – June 2021 – no doubt successfully twisting and turning where needed, and also leaning on her Board of Directors to keep AAPL going strong and remaining visible to its members.

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

- Lean on AAPL -

AAPL is your professional association. It is here to help you weather the storm and travel this road of uncertainty. Remain involved, participate in online education, webinars, and chats. Offer ideas and learn from your colleagues. AAPL is membership-focused, take advantage of that! Keep your dues up to date and reap the benefits of AAPL – our professional community is needed by each member now more than ever.

-Beth Kassalen

AAPL Executive Director

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.

WiredWorkshop

presented by



Physician Relations
and the Path Forward:

WHAT'S NEXT?

October 21-22, 2020