

The 10 Laws of Physician Engagement

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| Law of Physician Engagement | Lesson for Financial Advisors | Action Steps |
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| 1. If you want to conduct business with doctors, conduct yourself as one. | People want to work with people they know, like and trust. | Conduct yourself as the “wealth doctor.” |
| 2. Doctors manage their wealth as patient manage their health. | Understand “patient” behavior. | Be aware that emotions drive motion. |
| 3. Doctors believe they have unique financial needs. | Perception is reality. | Demonstrate your working knowledge. |
| 4. Doctors triage and delegate. | Solve doctors’ urgent problems. | Address “hot topics” like tax planning and, accelerating retirement. |
| 5. Doctors behave like tropical fish— or “fish-icians” | Your top priority is to be seen as “one of them” who knows the secret handshake! | Gather intelligence to be at the right place and the right time with the right |
| 6. Doctors want to work with experts— not sales reps. | Master the mental handshake; show you’re not armed with a sales pitch | Establish expertise by delivering value AT EVERY ENCOUNTER. |
| 7. The most influential person is a doctor’s life is another doctor. | Get doctors to open the red velvet rope. | Create a doctor advisory board, and inspire doctors to “toot your horn.” |
| 8. Doctors need repeated exposure to a message before they take action. | Be patient. Doctors will move forward at their own pace. | Implement smart automated drip marketing. |
| 9. “Doctors like boxes.” | Break through complexity and keep things simple. | Tell doctors what they need to know to inspire them to take action. |
| 10. Doctors are people. | Once you successfully build relationships with doctors, they’re just like any other | Become more skilled at engaging doctors in initial conversations and building trust. |