

HOW AND WHEN TO SELL TO THE NHS?



**Understanding the NHS
Annual Financial Cycle.**

THE ANNUAL

FINANCIAL YEAR

CALENDAR

DOMINATES EVERYTHING

This carousel has been adapted from the
[following article:](#)



Understanding the NHS annual cycle is critical if you're working with it. Here's what you need to know.



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38 articles

✓ Following

LIAM CAHILL

Founder at Together Digital

“Successfully working with the NHS is done by tuning in to it's rhythm, and being proactive and ready for the right moment.”

The NHS is actually quite predictable.

So like with your allotment or garden, there is something to be done throughout the different phases of the NHS year, it may just not be outright selling.”



THE NHS FINANCIAL YEAR IS APRIL TO MARCH.

The first and most important thing you need to understand is that **the NHS does not function on calendar years.**

If the NHS is your primary customer then all of your **outgoing materials** should be absolutely aligned with this, and not communicated by calendar year (Jan - Dec).

APRIL

THEY ARE DOING:

- . Budgets will have all but been assigned.
- . Most delivery focused teams in the NHS will be fairly busy starting implementation.
- . If Easter falls later then this might be a slower month as people take time off over the bank holidays.

YOU SHOULD BE:

- . Focusing on **customer support** and making your **existing partners** happy.
- . If you're kicking off new projects then getting the **contractual and financial logistics** in place is wise.





THEY ARE DOING:

- . Delivery should be in full swing and heads down for planning.
- . If they have open tenders based on their agreed budgets for the current financial year then this might be when they will be formally going out to market.

YOU SHOULD BE:

- . Chasing any outstanding activities with **momentum** as this is the end of that window to do so.
- . Focusing on **soft engagement** and gentle **relationship building**.



JUNE

THEY ARE DOING:

- . **Peak delivery** will be kicking in.
- . **First mini conference** season of the year with events like NHS Expo (now called Confed Expo) and a few others **getting people out and about**.



YOU SHOULD BE:

- . Taking the opportunity to **network** before the summer break.
- . **Arranging meetings** in August with people you do meet.
- . If already delivering with NHS partners, focus on **success and implementation**.



JULY

THEY ARE DOING:

- . **Busy and crammed with meetings.**
- . **A mad dash to get meetings covered, decision making before everything slows down or stops around the 20th of July.**

YOU SHOULD BE:

- . **Focusing on business development, being patient and understanding.**
- . **Suggesting discussions when things quieten down over the summer.**



AUGUST

THEY ARE DOING:

- . **Summer holidays.**
Nothing really gets done.
- . **Very few internal or big meetings which might mean that there are some free diary slots going.**



YOU SHOULD BE:

- . **Trying to get exploratory meetings and relationship building underway.**
- . **If you have existing NHS partners, now is the time to be trying to detail case studies that you can share in the months ahead.**
- . **Apply for awards (calls will be coming out.)**



SEPTEMBER

THEY ARE DOING:

- . **Back from holiday.**
Ready to catch up on meetings.
- . **Mindful that they need to start planning soon** and will be germinating and propagating ideas.

YOU SHOULD BE:

- . **PRIME CONTRACT TIME.**
- . Starting to put out more **tangible proposals** in preparation for the next FY business case development cycles.
- . Start communicating our **plans and intentions** for the following year to our NHS subscribers



OCTOBER

THEY ARE DOING:

- . Getting into winter conference and awards period.
- . Many teams will also be very much focusing on Hurricane Season (Winter Pressures).
- . May divert energy and attention there.

YOU SHOULD BE:

- . **Getting out there**, trying to set up or have meetings, win awards, get tangible interest, holding webinars.
- . **Start talking to existing leads** about their plans for the next financial year.
- . **Anticipate the budget**, process and timescales they will need if they are thinking about you.



NOVEMBER

THEY ARE DOING:

- . Start scheduling in air time and gathering information for their business cases.

- . Usually the time where they are most receptive.

YOU SHOULD BE:

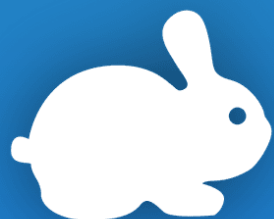
- . **Going hard for it!** (But don't be a pest).
- . **Sending over proposals and supporting assets** (such as helpful template business cases and information sheets that could be used in a tender) and commercial stuff.
- . **Be receptive to the needs of any of your hot leads.**



DECEMBER

THEY ARE DOING:

- . A bit of a dead month. Winter pressure will be full on.
- . Likely to struggle to get a meeting.
- . Late December is also when the NHS puts its operating guidance out.



YOU SHOULD BE:

- . Probably not much.
- . Do some light engagement, but don't push too hard.
- . Send nice and eye-catching Christmas cards.



JANUARY

THEY ARE DOING:

- . Starting to actively get plans agreed by their boards, if they can get airtime.
- . Peak winter pressure.
- . Discussions may be getting bounced off until it begins to calm down in February.

YOU SHOULD BE:

- . Keeping warm and **your morale up.**
- . Respectfully keeping the **momentum going,** and checking in.
- . Have **under-spend discussion** and agreements, especially for consulting and service work.



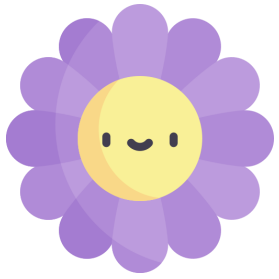
FEBRUARY

THEY ARE DOING:

- . Work is getting done a decisions are being made.
- . National bodies are dropping more clarity around the coming financial year.
- . Looking to tie up plans.

YOU SHOULD BE:

- . Hopefully be hearing back around business cases for the following year and getting ready with planning.
- . **Send out follow up reminders with few extra information, conduct webinars, remind folks that you can accommodate underspend.**



MARCH

THEY ARE DOING:

- . **Last minute national guidance will be coming out.**
- . **There may be a few last minute decisions and planned projects going down.**
- . **The last 2 week are dead weeks as the need to use up remaining leave comes into play.**

YOU SHOULD BE:

- . **Last minute deal sealing, and invoicing. Period.**



BUT THAT'S SO LITTLE TIME FOR ENGAGEMENT AND SELLING?

Yes dear, beloved reader. Exactly.

**That's why you've got to be clever
and proactive to make all of the gains
you can in the short windows
available.**

Hope you found this helpful!



This is a series we are making to help
HealthTech Innovators access better
resources.

Just our small way of helping!