Marketing Role in CRM: Nurturing Leads Along the Path to Care
Housekeeping

Audio is available through your computer speakers or through dial-in. All lines are muted.

You can submit questions/comments at any time. We will address all questions during the Q&A session at the end of today’s presentation.

Links to the slides and recording will be made available and sent to all attendees via e-mail.
About Us

We work with nationally-recognized Institutions:
- 5 “Honor Roll” institutions
- 5 out of the top 10 cancer programs
- 3 out of the top 4 pediatric hospitals
- 3 out of the top 10 cardiovascular programs

National Benchmarking Studies:
- Patient experience management
- Marketing practices
- Physician relations programs
- International programs

Ranked as one of top 35 Healthcare Consulting firms by Modern Healthcare

Presented By
Shannon Frazier
Practice Lead, Digital Insights & Dashboards
Agenda

3 Innovative Ideas

To help you build a foundation for 1:1 marketing

1. Lead Nurturing
   Nurturing leads by integrating digital and traditional channels with email marketing

2. Quality Interactions
   Maximizing quality interactions with leads from online and offline campaigns

3. Channel Switching
   Stopping leaks when your leads switch channels

4. Customer Service on Social Channels
   Tips for taking on Social customer service

5. Metrics that Matter
   Demonstrating impact and effectiveness through lead tracking across channels
Integrating digital and traditional channels with email marketing
Send me an email... and I’ll ignore it later.

Content + Timing = Relevance
Marketing

Making Appointments
Asking a question
More Information
Find a Doctor
Make a Donation
Getting a Referral

Call Center

ONE WAY
Marketing + Call Center
Developing **Market & Customer Profiles for CRM**

How Do We Want to Engage?

<table>
<thead>
<tr>
<th>Acquisition</th>
<th>Action</th>
<th>Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How customers and leads find you</strong></td>
<td><strong>Desired versus actual actions taken</strong></td>
<td><strong>User generated content &amp; social sharing</strong></td>
</tr>
<tr>
<td>Ability to generate awareness, increase demand and drive leads and customers and prospects to website.</td>
<td>Ability to encourage desired passive and active engagement with digital touchpoints.</td>
<td>Ability to facilitate leads and customer participation in content development and conversation.</td>
</tr>
</tbody>
</table>

**BRAND BUILDING**

**CONSIDERATION & CONVERSION**

**ADVOCACY**
Prioritize vs. Nurture
Let Digital Do the Work For You

Workflow Rules
- Automatically schedule field visits
- Send thank you and follow up emails
- Generate lapsed/at-risk notifications

Marketing Automation

Brand Building
CRM to capture leads lost through channel switching
Channel Switchers
Customer Impact

Aggregated Impressions
- Owned
  - Web
  - Mobile
  - Social
  - Email
  - Events
  - Store
- Paid
  - Advertising
  - Paid Search
  - Sponsorship
- Earned
  - Media/PR
  - Natural/Direct Search
  - Social

Aggregated Conversion Rate
- Business Rules
  - Marketing Qualified Lead
  - Qualified Patient
  - Arrived Patient
  - Customer Lifetime Value

Attention

Engagement

Advocacy
Customer Impact

Experience Map

Awareness
- Perceptions / knowledge
- Choice of hospitals for delivery / practice
- Ideal relationship

Need
- Evaluation and selection of treatment providers
- Discussion with patients (diagnosis, referral options)
- Preparing patients for what to expect

Scheduling
- Initial contact
- Timing and ease of process
- Resources for patients and their families

Treatment
- Coordination of care with specialist
- Progress notes and methods of communication
- Family feedback about their clinical experience

Transition of Care
- Discharge summary
- Coordination of on-going care
- Ongoing patient care/support
- Call-backs for assistance

Primary Experience Stewards
- Physician Liaisons
- Faculty/Staff
- Front Desk Staff
- Faculty/Medical Staff
- Support Staff
- Faculty/Medical Staff
- Support Staff
- Faculty/Medical Staff
- Support Staff
- Faculty/Medical Staff
- Support Staff

Key Touchpoints
Using **Social Media** to Provide Customer Service

Are You Meeting Customer Expectations?

Source: PwC HPI Social Media Consumer Survey, 2012
Using **Social Media** to Provide Customer Service

- Listen at Key Touchpoints
- Capture, Categorize and Prioritize
- Respond & Escalate (if needed)
- Integrate with CRM
- **ANALYZE & IMPROVE**

**Figure 8: Percentage of respondents finding value in services offered by healthcare providers via social media**

- Availability of doctor appointments: 72%
- Appointment reminders: 71%
- Referral to specialists: 70%
- Discounts or coupons for services: 69%
- Continued support post-treatment/discharge: 69%
- Voice complaints/seek customer service: 68%
- Patient reviews of doctors: 68%
- Treatment reminders: 68%
- Current ER wait times: 65%

Source: PwC HRI Social Media Consumer Survey, 2012

**Think Bigger than Issue Resolution**
Measuring the Impact

Selecting Measures and Metrics That Matter
Selecting **Measures** and Metrics That Matter

**Initiatives & Tactics**

**Acquisition**
*How customers and leads find you*

Ability to generate awareness, increase demand and drive leads and customers and prospects to website.

**Action**
*Desired versus actual actions taken*

Ability to encourage desired passive and active engagement with digital touchpoints.

**Participation**
*User generated content & social sharing*

Ability to facilitate leads and customer participation in content development and conversation.

---

**Brand Building**

**Consideration & Conversion**

**Advocacy**

---

**Desired Outcomes**
*(Tangible & Intangible)*
Selecting **Measures** and Metrics That Matter

**Initiatives & Tactics**

**Acquisition**
*How customers and leads find you*

- Ability to generate awareness, increase demand and drive leads and customers and prospects to website.

**Action**
*Desired versus actual actions taken*

- Ability to encourage desired passive and active engagement with digital touchpoints.

**Participation**
*User generated content & social sharing*

- Ability to facilitate leads and customer participation in content development and conversation.

**Desired Outcomes**
**(Tangible & Intangible)**

**BRAND BUILDING**

**CONSIDERATION & CONVERSION**

**ADVOCACY**

*Don’t Forget Your Call to Action!*
Picklists & Checkboxes!
Standardize Data For Ease of Reporting

Use standard options for tracking:
• Campaign Tactics Names
• Audience and Segments
• Dates/times
• Service Line Promoted
• Tagging Content/Messages

Marketing Activities
Voice of the Customer
Digital Marketing Tools
Tools to Track Leads and Conversions

- Tracking codes
- Vanity URL
- Vanity Numbers
- Referring Physician App
- Invisible Transfer
- Calls to action
- Print Material
- Clickstream (views, downloads, UGC)
- Monitored Sessions
- Form Abandonment

#FreeParking
Print materials with unique codes to track patient leads.
Marry Your Data!

- Referrals AND Leads
- Quality of Relationship
- Advocacy
- Issue Resolution
- Analyze/Segment
Quick Start

Getting Started Today

• Maximize CRM and Email Marketing tools for use with both anonymous and customer data (ask us for our digital tool checklist)

• Use profiles to help you understand customer needs, preferences and expectations to target messages and communications. 100% know how your customers want to engage with you!

• Remember it’s not just what you say, but what you do. Use voice of the customer and social media to help us understand and address customer pain points.

• Borrow out of industry tactics to engage with your customers in new and innovative ways- they are expecting it! (Ask us for our Campaign Planning Matrix)

• Tell a compelling story with your data by overlaying data sources and by using rich visual graphics
Questions?

“The experience begins and ends outside the institutional walls. This is where expectations are set and advocacy (word of mouth) often takes place.”

- Gelb Consulting Group
Endeavor Management is a management consulting firm that leads clients to achieve real value from their strategic transformational initiatives. We serve as a catalyst by providing the energy to maintain the dual perspective of running the business while changing the business through the application of key leadership principles and business strategy.

In 2012, Gelb Consulting became an Endeavor Management Company. Our combined experience (Gelb founded in 1965) offers clients unique capabilities to focus their strategic initiatives with a thorough understanding of customer needs to drive marketing strategies, build trusted brands, deliver exceptional customer experiences and launch new products. Our experienced consultants and analysts use advanced marketing research techniques to identify customer needs and spot high potential market opportunities.

The firm’s 40 year heritage has produced a substantial portfolio of proven methodologies, enabling Endeavor consultants to deliver top-tier transformational strategies, operational excellence, organizational change management, leadership development and decision support. Endeavor’s deep operational insight and broad industry experience enables our team to quickly understand the dynamics of client companies and markets.

Endeavor strives to collaborate effectively at all levels of the client organization to deliver targeted outcomes and achieve real results. Our collaborative approach also enables clients to build capabilities within their own organizations to sustain enduring relationships.