Marketing's Secret Weapon for Improved Patient Engagement

Gary Druckenmiller
Marketing Practice Leader
Evariant
Meet your speaker

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Evariant
About Evariant

The leading provider of a healthcare CRM platform designed to help health systems thrive in today’s hyper-competitive and rapidly changing environment.

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Agenda

› What You Think
› What is Marketing Automation?
› What to Look for in a Marketing Automation Tool
› How to Nurture Acquired Consumer Prospects
› How to Engage and Retain Existing Patients
› Campaign Ideas and Concepts
› What Others are Doing
› Final Thoughts
Almost 75% of those surveyed DO NOT yet have a marketing automation tool or are unsure if they do.
If you have a marketing automation tool in place or are planning on implementing one soon, how do you use it? Please check all that apply.

Answered: 26  Skipped: 14

<table>
<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
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<tbody>
<tr>
<td>Nurture existing patients</td>
<td>69.23%</td>
</tr>
<tr>
<td>Nurture inbound leads (prospective patients)</td>
<td>69.23%</td>
</tr>
<tr>
<td>Communicate with physicians</td>
<td>34.62%</td>
</tr>
<tr>
<td>Send one off email sends to existing patients</td>
<td>34.62%</td>
</tr>
<tr>
<td>Send one off email sends to leads (prospective patients)</td>
<td>38.46%</td>
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</table>

Total Respondents: 26

Comments (1)

Well into the majority plan on using marketing automation for “nurturing” both consumers and/or existing patients.

Perfect.
What is Marketing Automation?
Marketing Automation Defined

A persistent methodology for acquiring/developing prospects and engaging patients so that they keep your health system on the “list for consideration.”
“Not implementing a Marketing Automation (MA) solution may be the ultimate career limiting move for today’s marketers. If you haven’t gotten started you’re already behind the 8 ball.”
“Marketing automation rules. Seriously, it kicks butt. You need it. You can personalize content easier. Qualify prospects faster. Cut 100 hour campaigns down to 10. Gleam a 71% improvement in YOY acquisition cycle time. 51% improvement in clinical conversion rates. And 54% in patient engagement.

What’s up?”

Gary D., about 8 days ago
The Stats on Marketing Automation

Being a priority to CMO’s or other C level execs

30% of marketing-related technology & services are already purchased by marketing executives, and in 2011 B2B & B2C marketing budgets were almost three times as high as IT budgets.

How many Fortune 500, mid-level and small companies are using marketing automation?

- 15% of small & midsize businesses (SMBs) have adopted a map.
- 36% indicated they are planning to use a map within the next year - that's more than double!
- 25% of Fortune 500 companies use marketing automation.

(Marketing automation platform = MAP)

Marketing is the fastest-growing CRM category for 2012 when it grew at 21%, more than four times the software industry forecast norm for that year.

4,000+ attended the connections event last year. This was record-setting.

Salesforce.com noted that Gartner has forecasted that 21 percent spending growth to continue through 2017.
THE NEED FOR AUTOMATION

Marketing and sales departments alike experience issues with the lead generation process. These issues can lead to a disconnect between the two departments, but that can be corrected with automation.

- 68% of companies have not identified or attempted to measure their sales funnel.
- 65% of companies have no defined lead nurturing process or toolset.
- A staggering 79% of marketing leads are never converted to sales.
- Only 56% of companies have a system or toolset in place to qualify marketing leads.
Corporate Marketing 1:Many

Corporate provides approved collateral & leads to local agents.

Local measurement is difficult & time-consuming.

Agents waste time trying to customize materials for the local market.

Co-op marketing dollars may be offered, and are difficult to track.

Local Producers 1:1

Brand, legal & quality standards are easily compromised.

Campaigns are of poor quality and irrelevant to the customer.

New channels like social & mobile have increased complexity.

Agents lack tools & sophistication needed to leverage channels.

Communication Channels

Customers
The Ultimate MA Goal

<table>
<thead>
<tr>
<th>Consumer-Centric Content</th>
<th>The Start</th>
<th>Progress</th>
<th>Nirvana</th>
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</thead>
<tbody>
<tr>
<td>Mimic messages across channels and media manually</td>
<td>Integrate response reporting for online/offline and for print/email/voice campaigns</td>
<td>Automate integrated campaigns and reporting across channels and media</td>
<td></td>
</tr>
<tr>
<td>Blast campaigns targeted to segments based on product history</td>
<td>Different versions to different lists to improve relevant messaging</td>
<td>Automated 1 to 1 dynamic messaging using print on demand and dynamic email</td>
<td></td>
</tr>
<tr>
<td>Preference Center</td>
<td>eMail &amp; Phone Opt-in</td>
<td>Basic preference profiles</td>
<td>Many explicit preference options combined with implied preferences based on behavior</td>
</tr>
<tr>
<td>Analytics &amp; Behavioral Targeting</td>
<td>email &amp; site behavior tracked separately from conversion response behavior</td>
<td>Use email &amp; Web behavior to improve email cadence</td>
<td>Triggered print/email/voice messaging based on preferences, Website, email &amp; purchase behavior</td>
</tr>
<tr>
<td>A/B &amp; Multi-Variant Testing</td>
<td>Ad hoc campaign testing</td>
<td>Turnkey routine testing</td>
<td>Automate reporting dashboards throughout the organization</td>
</tr>
</tbody>
</table>
Highlights of Marketing Automation

Automate repetitive tasks
Reduce human error
Streamline marketing organization activity
What to Look for in a Marketing Automation Tool
Lots of Vendors
Numerous Cloud Based Marketing Automation Systems

salesforce marketing cloud

ORDER NOW!
00:59

ORACLE | eloqua | eTrique | HubSpot

Marketo | Infusionsoft

SalesFUSION | optify | TERADATA

Marketing Automation for the Rest of Us
Small Business Sales & Marketing
Qualification
Nurture Email - Personalized and Relevant

<table>
<thead>
<tr>
<th>From: Jim Redmond</th>
<th>To: Jason Smith</th>
<th>Subject: Forrester Lead Generation Report</th>
</tr>
</thead>
</table>

Hi Jason,

I noticed you were on the site today and downloaded our 8 Critical Steps to Lead Generation Guide. I also thought that you may also be interested in a new Forrester Report on Lead Generation available complimentary to you at [http://www.omniture.com/forrester/lead-generation](http://www.omniture.com/forrester/lead-generation).

We've been helping a number of our High Tech marketing customers, similar to Software, Inc, improve lead generation through Omniture Test&Target as well as measure important campaign results beyond the lead such as opportunities, closed deals, and sales with Closed Loop Marketing for Salesforce.

If you don't mind, as I periodically come across relevant information to assist you in your job, I'll send it to you. Please let me know if I can provide you with a free evaluation report of how [www.software.com](http://www.software.com) compares in generating leads to others in the industry – it requires only 15 minutes of your time to walk you through the findings.

Please contact me with any questions at (888) 783-3942.

Jim Redmond
Omniture

Also, if you find that my emails aren't of value to you, please [click here](http://www.software.com) and I'll stop sending them – hopefully, this isn't the case.
A Focused Direct Marketing Campaign Evolves Over Time To Capture Qualified Leads And Increases Closed Sales

<table>
<thead>
<tr>
<th>Month</th>
<th>Activity Description</th>
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<tbody>
<tr>
<td>Month 1</td>
<td>3rd party article on decreasing shopping cart abandonment: e-mail &amp; follow-up call/voice mail</td>
</tr>
<tr>
<td>Month 2</td>
<td>Forrester Report on behavioral targeting: e-mail &amp; follow-up call/voice mail, mailed report</td>
</tr>
<tr>
<td>Month 3</td>
<td>Experts-On-Demand Retail Webinar: e-mail &amp; follow-up call/voice mail</td>
</tr>
<tr>
<td>Month 4</td>
<td>3&lt;sup&gt;rd&lt;/sup&gt; party article on holiday shopping tips: e-mail, follow-up call/voice mail</td>
</tr>
<tr>
<td>Month 5</td>
<td>Complimentary Retail Site Assessment via OTTO Digital: e-mail, follow-up call/voice mail</td>
</tr>
<tr>
<td>Month 6</td>
<td>Invitation to relevant event</td>
</tr>
<tr>
<td>Month 7</td>
<td>3rd party article on pertinent technology via e-mail</td>
</tr>
<tr>
<td>Month 8</td>
<td>Invitation to webinar via e-mail with follow-up call</td>
</tr>
<tr>
<td>Month 9</td>
<td>Free report via direct mail with follow-up call</td>
</tr>
<tr>
<td>Month 10</td>
<td>Invitation to local seminar via e-mail with follow-up call</td>
</tr>
<tr>
<td>Month 11</td>
<td>Link to relevant partner webinar via e-mail with follow-up voicemail</td>
</tr>
<tr>
<td>Month 12</td>
<td>Retail Industry case study via e-mail with follow-up call</td>
</tr>
</tbody>
</table>
Templating

Template Development

Enjoy hassle-free rollover service

Schedule a free consultation

If you’ve been avoiding the decision to roll over your retirement plan assets due to the paperwork and red tape involved, turn to American Century Investments®. You’ll work with a Rollover Specialist responsible for tackling the details for you by overseeing the transfer from your employer’s plan to your new Rollover IRA from start to finish.

Your dedicated Rollover Specialist will:

- Guide you through calls with your former employer as necessary.
- Assist you with all the transfer paperwork.
- Provide complimentary investment advice and guidance to help you build a diversified portfolio and select a mix of investments appropriate for your goals.
- Monitor the status of your rollover and notify you once your funds have been transferred.

Our one-call rollover service makes rolling over your retirement assets simple. And, your satisfaction is guaranteed.

Make a smart move. Call 1-800-345-2451 or get started by scheduling a complimentary, one-on-one consultation.

Still have questions? We’re here to help. Access articles, tools and calculators.

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Real World Email

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Andrew Bruns
Investment Consultant
1-888-345-9166 Ext. 48120
ecomm3@americancentury.com
www.myamericancentury.com/andrewbruns

You should consider the fund’s investment objectives, risks, and charges and expenses carefully before you invest. The fund’s prospectus, which can be obtained by calling 1-800-345-2451, contains this and other information about the fund, and should be read carefully before investing. Investments are subject to market risk.

Manage your subscriptions here
How to Nurture Acquired Consumer Prospects
Why Nurture?

70% of marketers believe that MA technology can help them develop more high-quality leads. *(Forrester Research)*

Marketing & Biz Dev personnel dedicate 14% of their time to lead development, but only 6.3% of leads are utilized. *(Sirius Decisions)*
Plugging the Leak

New marketing focus

Reach → Interest → Desire → Convert → Enrich → Retain

Sales focus

Lead-nurturing programs plug the leak.

Lead information capture, scoring, routing, and monitoring close the gap.

1. Define your objective
2. Define the WHO
3. Define collateral needed
   ▶ Touch point
     • Emails
     • Postcard
     • Phone scripts
     • Letter
   ▶ Content Assets
     • White papers
     • Web cast
     • Analyst reports
     • Pod cast
     • Articles
     • Flash demo
     • Research Papers
   ▶ Interactive media
     • Poll / survey
     • Scorecard / rank yourself against your peers
4. Map out the customer experience
5. Test and launch
6. Ongoing evaluation and monitor reporting
7. Keep content fresh
Best Practices to Start

› Keep it simple to start
› Provide value-added content
› Allow leads to “raise-their-hand” with secondary calls-to-action
› Keep them interested by telling them what is coming next
› Track online activity to determine when a lead’s interest has increased
Best Practices in Flight

- Nurture leads throughout the **buying cycle**
- Average of 4 touches/program
- **Test timing** between touches
- B2B: 10 days between touches
- B2C: 3-8 days between touches; **more frequent in front half**, then slow
How to Engage and Retain Existing Patients
**Marketing & Ops Procedures**

**Definition & Planning**
- Assemble plans for advanced targeting
- Define goals for patient engagement

**Data Collection**
- Obtain all data info from emails and sources
- Map out all data required to deliver new engagement tactics

**Data Targeting**
- Develop data targeting strategy
- Determine data validation process
- Develop ongoing processes

**Engagement**
- Implement engagement program
- Develop client cycling and frequency processes

**Physician Inclusion**
- Develop joint co-branded campaigns
- Track/report and provide physician with necessary data

**Personalized Content**
- Engage top patients with highly personalized content

**High-Touch Activities**
- Top patient direct mail
- Follow-up with timely phone call and email

**Engagement Refinement**
- Adjust and re-engage
- Re-target with new messaging

**Conversion**
- Convert and maintain program
Map the Patient Journey

Systematically track the behavior of individuals from the research to conversion stage, and then work with system operations to understand where patients drop off, and how we can best target them with the right communication at the right time to reengage them:

- At what point should an outbound call be placed instead of an email?
- At what point does the patient move to the patient portal as the main point of connection with system? How should marketing be involved here?
- How might we help the patient experience after the information session, leading up to surgery, post-surgery, etc.?
Patient Journey Map

1. Marketing segment is identified
2. An individual who was targeted sees an ad (or multiple ads)
3. Online research about weight loss surgery leads her to UC Medicine's website
4. A week later, further research lands her on a UC Medicine campaign landing page where she fills out a form to register for an information session
5. She receives a thank you email and event confirmation
6. She receives an event reminder the day before the event
7. She attends an information session
8. She attends an information session
9. New Patient Visit
10. Pre-op Psychology Screening
11. Pre-op medical and surgical screenings
12. 6-9 months later — after medical weight management, support groups, pre-op testing, etc...
13. She has bariatric surgery
14. She has post surgery medical care and concerns. Her skin is flabby. She is in pain. She has to be on a liquid diet. She still has diabetes, but it is being managed by a non-penn primary care provider (MAYBE).
15. She receives an email about our plastic surgery program
16. She has a lower body lift done 6 months later
17. She brags about UC Medicine’s care to her friends, rates her doctors on public websites, joins the weight loss online community, and offers to post her patient testimonial online
Patient Retention Program

1. Send Invite Email 1.0
   - Objective: Engage with Patient; Value Proposition
   - Wait 3 days
   - Register
   - If Register is YES, proceed to Send Confirmation Email 1.0:
     - Objective: Register for webinar
     - Link to webinar Registration Page
     - 1 Day Pre-Webinar
   - If Register is NO, proceed to Send Invite Email 1.1:
     - Same as 1.0 email with new subject line
     - Wait 4 days
     - Register
     - If Register is NO, proceed to Send back to Nurture Program

2. If no action in 7 days, proceed to Send Invite Email 1.1

3. If no action in 14 days, complete initial actions.

4. Send Reminder Email 1.0
   - Webinar
   - Attend
   - If Attend is YES, proceed to Thanks for attending (w/ Survey)
   - If Attend is NO, proceed to Sorry We Missed You
7 Rules of Engagement

1. Do not initiate contact without a clear objective.
2. Start with the patient, not the service.
3. Pick up where the last interaction left off.
4. Don’t ask a patient for the same thing more than once.
5. Make the interaction personal and personalized.
6. Deliver information that reflects what you’ve learned about them.
7. Learn about patients in bits….not all at once.
Campaign Ideas
# Campaign Ideas

<table>
<thead>
<tr>
<th>Interest</th>
<th>Learn</th>
<th>Evaluate</th>
<th>Justify</th>
<th>Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>Education</td>
<td>Why Us</td>
<td>Urgency</td>
<td>New</td>
</tr>
<tr>
<td>Campaign</td>
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<td>Campaign</td>
<td>Campaign</td>
<td>Customer</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Onboarding</td>
</tr>
</tbody>
</table>

**GOAL**
- Welcome new subscribers
- Get them ready to talk to Sales
- Juxtapose your solution to their need
- Remove roadblocks, speed purchase decision
- Welcome new customers
- Retain and develop

**DESCRIPTION**
- Introduce brand
- Reiterate subscription benefits
- Engage to further profile prospect
- Educate about value prop
- Differentiate your brand from competitors
- Reiterate value prop
- Include relevant case studies, testimonials
- Provide decision tools
- Thank them
- Identify next steps
- Reiterate purchase/relationship benefit
- Seek feedback
- Tips/tricks to get most of product
Welcome Program

The Patient Communication Welcome Program is your first formal interaction with a new patient. It is a critical opportunity to thank your patients for their confidence, to reaffirm their purchase decision, and to set the tone for their patient experience.

Evariant recommends a multi-channel campaign to make a more powerful and positive first impression with new patients, including…

- Email thanking the patient, encouraging download of service info and linking to an patient social microsite through a personalized URL
- Direct mail reinforcing purchase decision, providing certificates for services and first service, and motivating the patient to visit the patient’s social microsite
- Patient’s social microsite where visitors can upload and share patient experiences, profiles and photos. The site would also enable patients to spread the good word about their new experience to friends and family, inviting them visit the personalized URL.
An ongoing retention program will continuously fill the pipeline by communicating with your best patients on a consistent basis.

This program will tap into the vast quantity of existing patients that are in-market for additional treatment or surgery every day.

Each month, qualified prospects from the following potential sources will be driven to a microsite/website to learn more about the service line or brand

- Former patients, who still model in-market
- Lifestyle events
  - New Movers
  - Recent failed surgery
  - Recent failed treatment
What Others are Doing
Fertility Acquisition Campaign

Campaign Duration: 5 Phases from November 2011 – June 2014

Preceded by a multi-channel campaign. Automation was used to send a series of emails to those interested in learning about Penn Fertility care.

GOALS

• Increase consultations and convert consultations into new patient

STRATEGY

• Guide individuals facing fertility issues to recognize their need to seek help
• Continue to communicate with patients through decision period
Fertility Acquisition Strategy

CTA Strategy: Soft CTA to convert leads, and provide an opportunity for ongoing engagement. Hard CTA for those ready to take action.

Nurturing Content: Penn Fertility Chronicles including 8 individual chapters
Fertility Campaign Automation

› All email content completed ahead of time, and scheduled within Eloqua.

› After form completion on the landing page:

  – Thank you email sent immediately
  – Issue 1 of chronicles sent withy in a day
  – Subsequent issues sent every month for 8 months to correspond with the ovulation cycle
Fertility Nurturing Results

- Total Delivered: 20,000
- Total Opens: 6,000
- % of Total Opens: 30% (Industry Standard: 15-30%)
- Total Appointment Requests: 45 directly from email
What Do I Now Know About My Leads?

Take Online Self-Assessment
Register for a Seminar
Download a Guide

(Nurturing for Acquisition Purchase Process: Interest, Learn, Evaluate, Justify, Purchase)

Lead Segmentation
Lead Interest
Lead Behavior
Lead Buying Stage

Compared to just ‘pushing to a website…’
‘Healthcare’ Buying Process

Example 1

Marketing Campaign
(Lead Generation)

Leads are shopping and buying now:
- Cancer (2nd opinion)
- Transplant
‘Healthcare’ Buying Process

Example 2

Marketing Campaign
(Lead Generation)

Leads are shopping now, with some buying. Other leads buying over a longer period of time based on various factors:

- Cardiology
- Orthopaedics (non-injury)
‘Healthcare’ Buying Process

Example 3

Marketing Campaign (Lead Generation)

Leads are shopping now, but buying after a period of education, evaluation and justifying the product:
- Weight-loss Surgery
- Home Dialysis
Weight Management

- SEO
- Pay Per Click
- Display
- Social Ads

**Take Online Self-Assessment**

- Main Landing Page
- Register for a Seminar
- Download a Guide
- Landing Page
- Seminar Register Page
- Thank You Landing Page
- Call

**Landing Page**
- Landing Page
- Landing Page 2 - Surgical
- Landing Page 2 - Medical

**Email Nurturing**
Weight Management

Acquisition Landing Pages
Weight Management

Lead Nurturing Emails

1 Week Post-Acquisition

3 Weeks Post-Acquisition

5 Weeks Post-Acquisition
## Nurture for Acquisition

### 4 Campaigns

<table>
<thead>
<tr>
<th></th>
<th>Total Leads</th>
<th>Direct Appointments</th>
<th>Leads to Nurture for Acquisition</th>
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<tbody>
<tr>
<td>Bariatrics</td>
<td>1,765</td>
<td>249</td>
<td>1,516</td>
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<tr>
<td>Orthopedics</td>
<td>825</td>
<td>61</td>
<td>764</td>
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<tr>
<td>Campaign C</td>
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<td>0</td>
<td>278</td>
</tr>
</tbody>
</table>

Total Appointments 339
Total Leads to Nurture 2,690
Leads to Nurture Ratio 8:1
Final Thoughts
Best Practices Operations

› Budget 50K – 200K depending on features and # of users.
› Need at least 1 resource dedicated to MA. Not shared!
› Plan on integrating MA with CRM and perhaps even CMS.
› Work with system ops immediately on lead flow/quality.
› Map every service line patient journey. **ABSOLUTE MUST!**
Q&A + Contact Information

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Visit evariant.com/events to see our full calendar & register for upcoming events