



Transitioning from Traditional to Strategic CRM



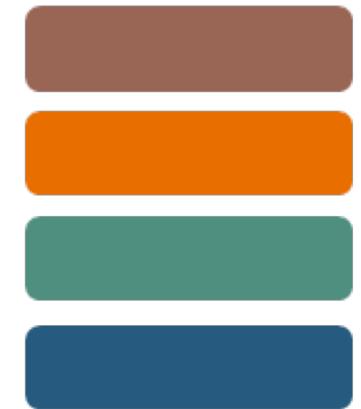
5 Disruptions to Marketing



Digital Transformation



Microservices and APIs



Vertical Competition



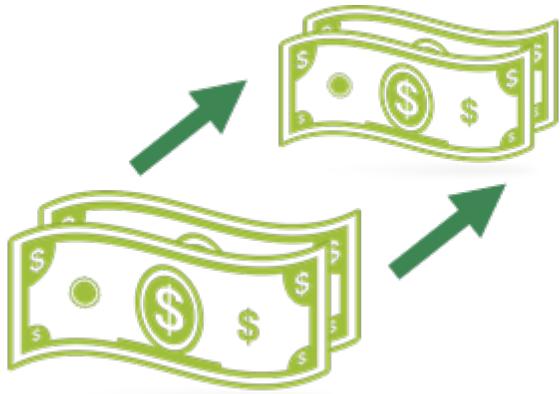
Digital Everything



Artificial Intelligence

The Landscape is Changing

Market Forces in the Healthcare Industry



**Reimbursement
is Shifting**



**Narrow
Networks**



**Service Line
Growth**



**Physician
Loyalty**



**Cost of
Delivery**



Regulation

Health Systems
need – and want –
to adapt their
approach to
marketing ...

A large billboard is illuminated at night, displaying the text "Is this really where you choose a doctor?". The billboard is supported by a tall, cylindrical structure. In the background, there are power lines, streetlights, and a highway overpass with light trails from cars. The sky is a deep blue, suggesting dusk or dawn.

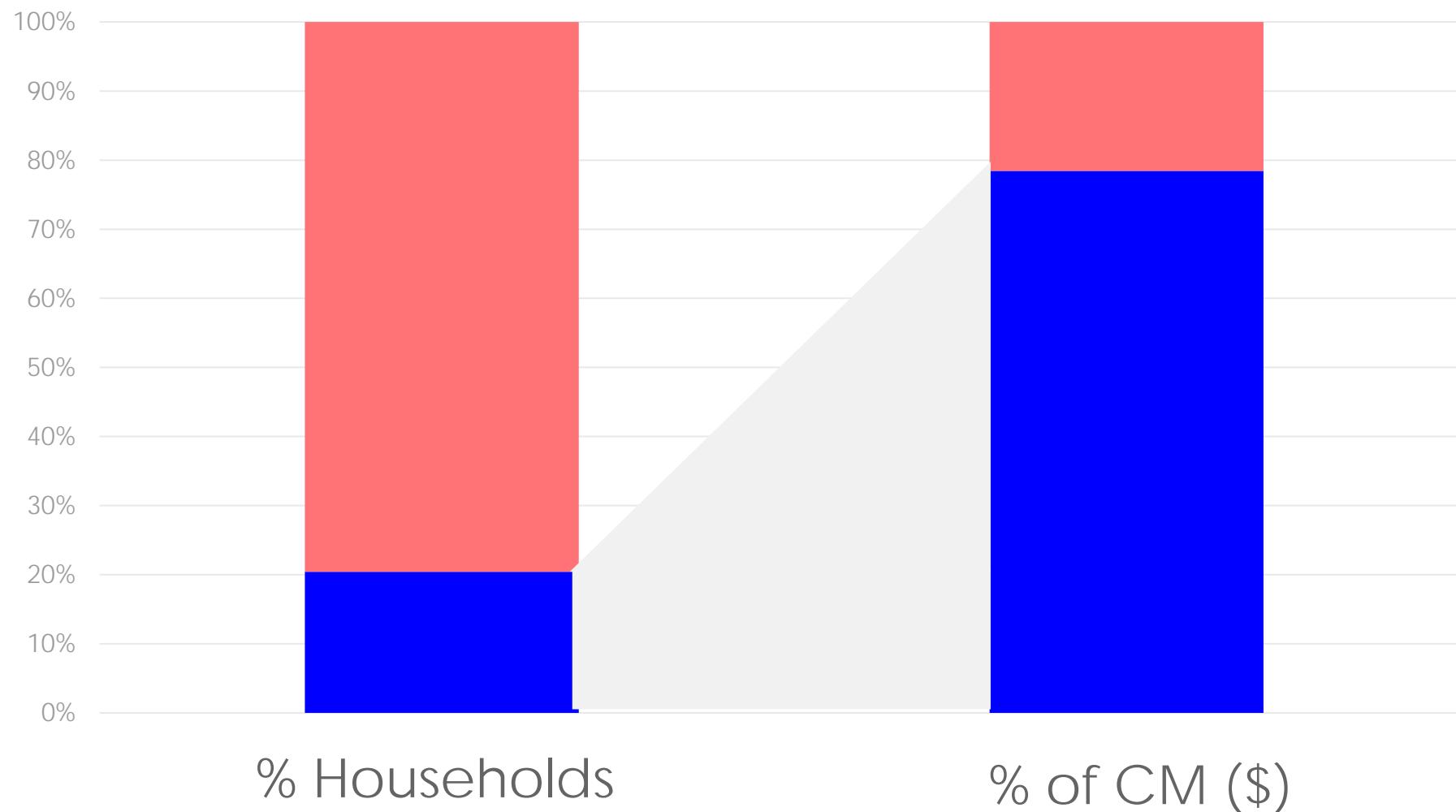
Is this really where you
choose a doctor?



20% OF YOUR PATIENT HOUSEHOLDS MAKE UP 78% OF YOUR CONTRIBUTION MARGIN

...Or 80% of your households makeup just 22% of your contribution margin

Contribution Margin Concentration



AGENDA

01 Traditional vs Strategic CRM

02 Insights that Matter



01: Traditional vs Strategic CRM

***CRM Strategy is
more than just a
list pull!***

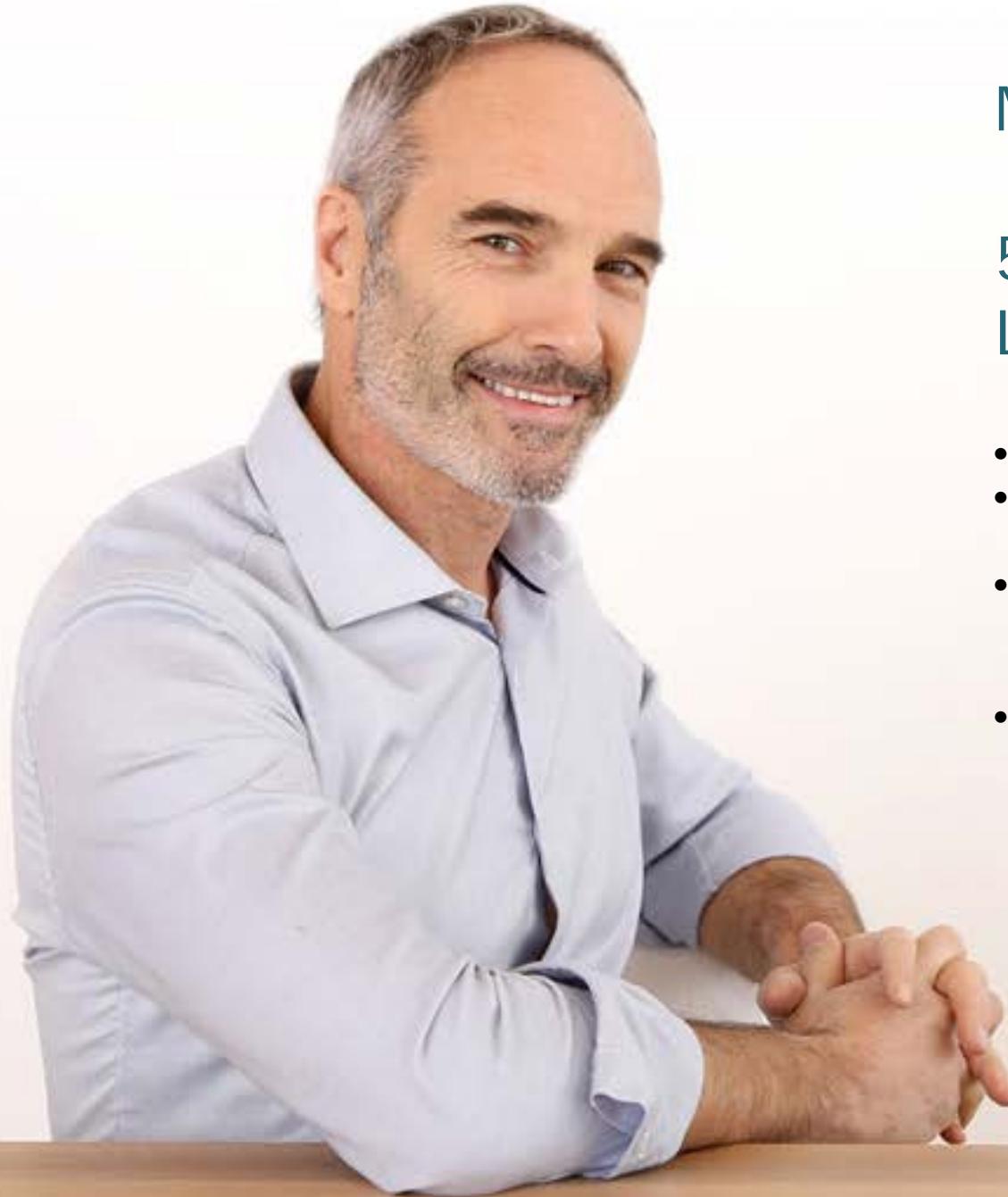
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01

A Consumer Centric Approach

Creating the FULL Consumer Experience



EXAMPLE CONSUMER JOURNEY



Meet Bob

56 Years Old
Lives in 39202

- Suffers from chronic back pain
- Enjoys golf but has been sidelined due to his back pain
- Demographics: white collar job, commercially insured, higher income, married
- Mildly tech savvy: text with his daughter who is away from home in college

EXAMPLE PATIENT JOURNEY

SEARCH

Sports Injury Treatment

Ad www.CrestnerHealth.com/Orthopedics

Find the Right Treatment for Your Sports Injury. Call Us for an Appt!

Walk Ins Welcomed · Full Service. Open 24/7

📍 1001 Main Street - (720) 555-1212 - Open today · Open 24 hours

Get Back Pain Relief Today - Chiropractic & Massage Special

Ad www.mountainviewpaincenter.com/

Top Rated Chiropractic Office \$49.00 Exam Treatment & 1Hr Massage

Neck Pain · Whiplash · Insurance's Accepted · Low Back Pain

A+ Rating – Better Business Bureau

\$49 Special · Conditions We Treat · Headache Treatment · Contact Us · Whiplash Treatment

📍 8216 S Holly St, Centennial, CO - Open today · 9:00 AM – 7:00 PM

Having Back Spasms? - Denver's UHealth Spine Center - uchealth.org

Ad www.uchealth.org/spine-center

UHealth Offers Personalized Care & Treatment for Back Pain. Request an Appt.

Dr. Scott Stanley, MD - Parker, CO - Orthopedic Surgery & Spinal Cord ...

<https://www.healthgrades.com/physician/dr-scott-stanley-2gkvr>

★★★★★ Rating: 4.1 - 18 reviews

Visit Healthgrades for information on Dr. Scott Stanley, MD Find Phone & Address information, medical ... Looking for an Orthopedic Spine Surgery Specialist?

Get Back Pain Relief Today

<https://www.CrestnerHealth.com/Orthopedics>

Back pain affects most of us at some time in our lives. Learn about common causes, tests and diagnosis, and methods of treatment and ...

Surgical Treatments for Lower Back Pain - Spine-Health

www.spine-health.com/...back-pain/non-surgical-treatments-lower-back-pain

... massage therapy can relieve the muscle spasms that usually ... and flow to the low back, which speeds up

Low back pain

Also called: lumbago

ABOUT

SYMPTOMS

Treatment consists of pain medications

Most low back pain goes away on its own in two to four weeks. Physical therapy and pain relievers can help. A few cases may require surgery.

Medications

Nonsteroidal anti-inflammatory drug, Analgesic, Muscle relaxant, Narcotic

Self-care

Heating pad and Physical exercise

Therapies

Joint manipulation, Stretching, Physical therapy, Yoga, Acupuncture

Medical procedure

Transcutaneous electrical nerve stimulation and Injections

Specialists

Primary care provider (PCP), Orthopedic surgeon, Physical therapist, Chiropractor, and Emergency medicine doctor

Consult a doctor for medical advice

Sources: Mayo Clinic and others. Learn more

Download PDF

EXAMPLE CONSUMER JOURNEY

DISPLAY AD

The screenshot shows a web browser displaying a Golf Channel article. The URL is www.golfchannel.com/news/golf-central-blog/spieth-believes-day-no-1-right-now/. The page features a navigation bar with the Golf Channel logo and various menu items like 'SCORES', 'NEWS', and 'VIDEOS & PHOTOS'. A prominent banner at the top offers a '55% + FREE GOLF' discount. The main article, titled 'Spieth believes Day 'is No. 1 right now'', is by Randall Mall and dated September 3, 2015. The article text discusses the rivalry between Jordan Spieth and Jason Day, with Spieth expressing his belief that Day is the current number one. A photograph of Spieth and Day shaking hands is included. To the right of the article is a sidebar with a 'GOLFADVISOR' ad and a 'Crestner Health' advertisement for 'Expertise in motion' orthopedic care. Below the article is an 'EDITOR'S PICKS' section with a small thumbnail of the article.

www.golfchannel.com/news/golf-central-blog/spieth-believes-day-no-1-right-now/

European Tour | BLOWNAGE | D. GAULT | D. HORSEY | B. EVA

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GOLFADVISOR
By golfers. For golfers.
FIND REVIEWS NOW

GOLF CENTRAL BLOG

Spieth believes Day 'is No. 1 right now'
By Randall Mall | September 3, 2015, 11:08 am

NORTON, Mass. - Rory McIlroy was No. 1 a few weeks ago, Jordan Spieth was No. 1 last week, and now McIlroy's back atop the Official World Golf Ranking this week.

Spieth said Thursday he believes Jason Day actually deserves the top ranking.

"I believe that Jason is No. 1 right now," Spieth said Thursday at the Deutsche Bank Championship. "I mean who would argue that after last week? He's playing the best of anybody right now. Until somebody dethrones him, hopefully me this week, he's still that guy to beat right now."

Spieth is No. 2 in this week's world ranking with Day at No. 3.

Day is looking to win this week for the fourth time in his last five starts. He was asked if he thought Spieth was right, that he, Day, is the real No. 1.

crestner HEALTH
Expertise in motion.
Outstanding Orthopedic Care
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EDITOR'S PICKS
Deutsche Bank Championship
Pursuit of No. 1 unites new Dig 3
Spieth believes Day 'is No. 1 right now'

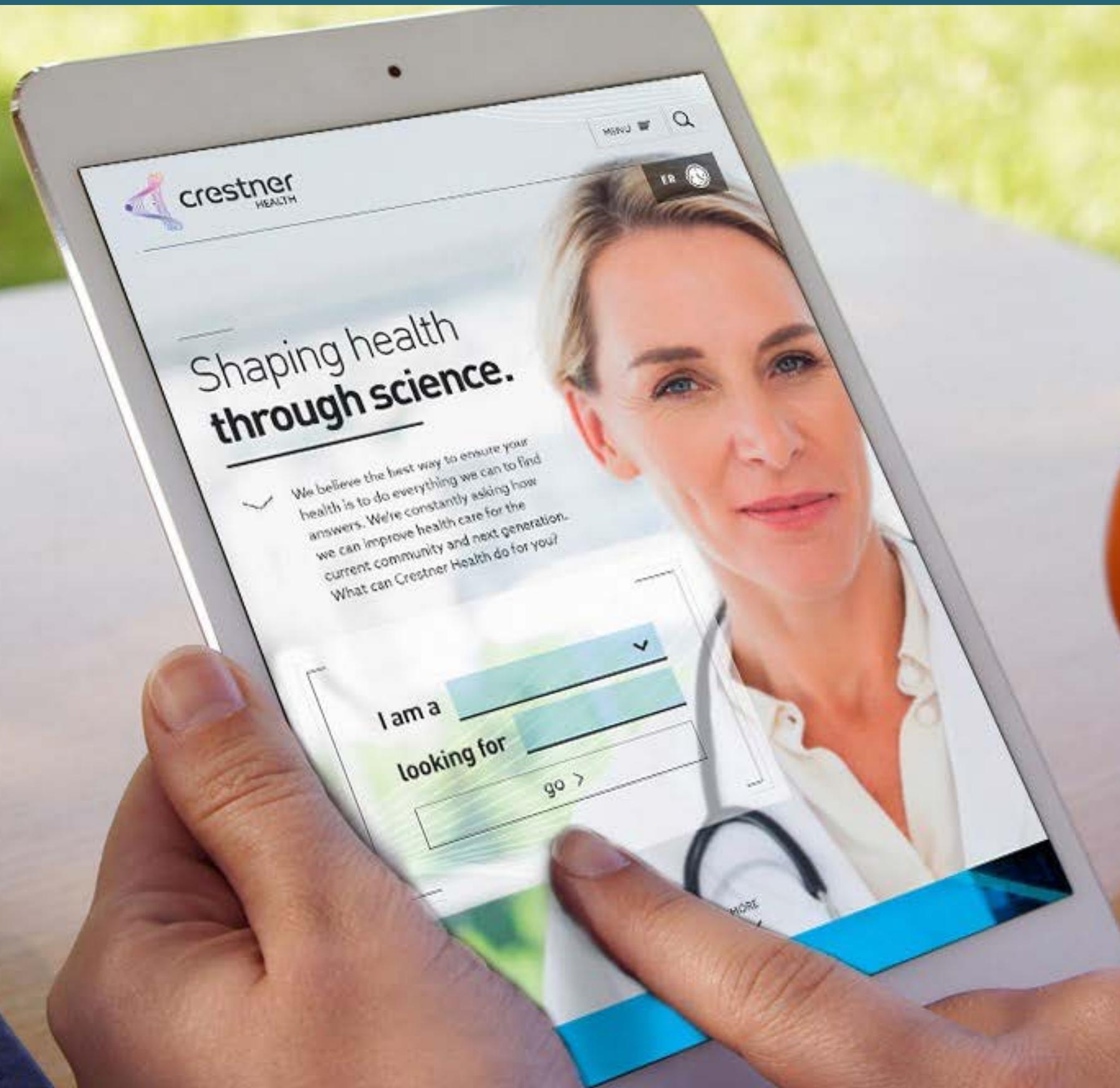
EXAMPLE CONSUMER JOURNEY

DIRECT MAIL



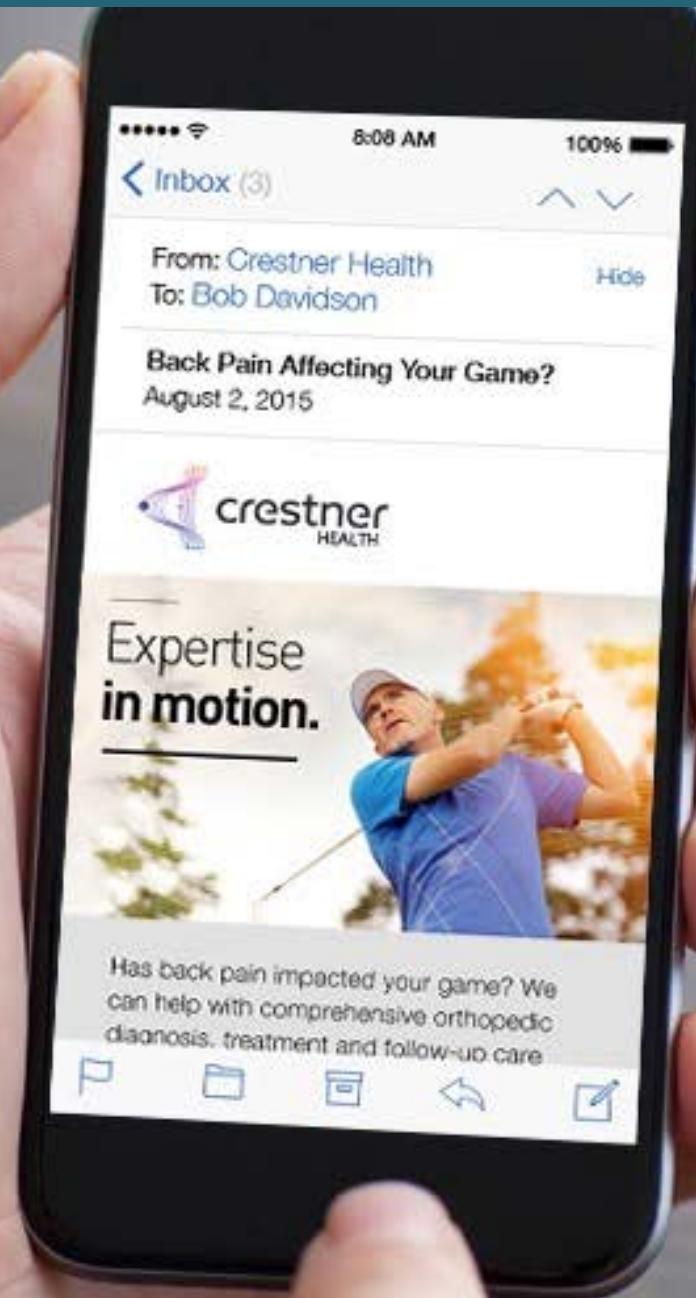
EXAMPLE CONSUMER JOURNEY

WEBSITE



EXAMPLE CONSUMER JOURNEY

EMAIL



EXAMPLE CONSUMER JOURNEY

SEMINAR



EXAMPLE CONSUMER JOURNEY

FIND A DOCTOR & SCHEDULE AN APPOINTMENT

The screenshot shows the healthgrades.com website. At the top, there is a navigation bar with a hamburger menu icon, a "REVIEW YOUR DOCTOR" button, and links for "PATIENTS", "PHYSICIANS", and "HOSPITALS". The main header features the healthgrades logo and the tagline "Better health begins here." Below this is a search bar with two input fields: "Search Doctors, Hospitals, Specialties or Procedure..." and "Near Address, City, State, or Zip". The main content area is a light blue box with the text "Let's get started. What type of specialist are you looking for?" and a grid of 12 buttons representing various medical specialties.

Family Medicine	Pediatrics	Internal Medicine	Dentistry
Cardiology	Obstetrics & Gynecology	Orthopedic Surgery	Ophthalmology
Endocrinology	Allergy	Dermatology	Gastroenterology

EXAMPLE CONSUMERS JOURNEY

APPOINTMENT



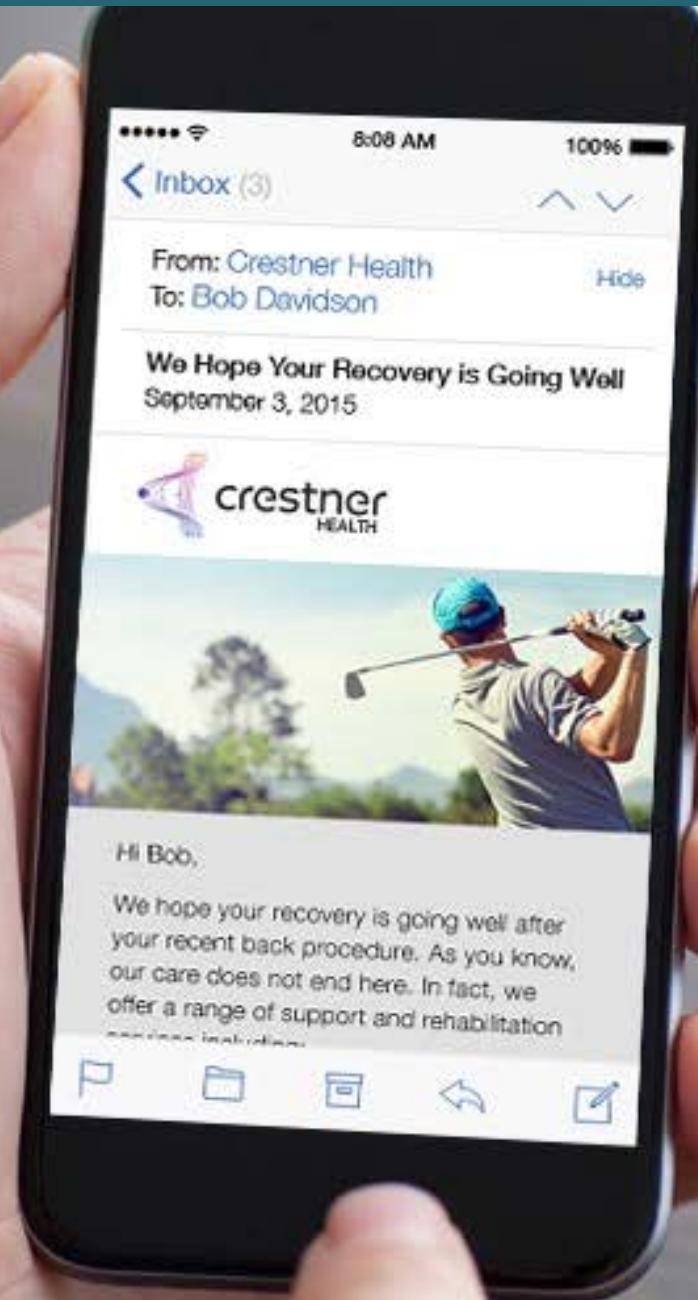
EXAMPLE CONSUMER JOURNEY

PROCEDURE



EXAMPLE CONSUMER JOURNEY

EMAIL



EXAMPLE CONSUMER JOURNEY

DISPLAY AD

The screenshot shows a web browser displaying the Golf Channel website. The URL is www.golfchannel.com/news/equipment-insider/whats-bag-day-maggert-. The page features a top navigation bar with the Golf Channel logo and various menu items like 'SCORES', 'NEWS', and 'VIDEOS & PHOTOS'. A secondary navigation bar includes 'WATCH LIVE TV', 'BOOK TEE TIMES', 'LOG IN', 'EMAIL SIGN UP', 'SHOP', and 'SEARCH'. The main content area is titled 'Equipment Insider' and features an article 'What's in the bag: Day, Maggert, Pieters, Pride' by Golf Channel Digital, dated August 31, 2015. The article text describes the golf equipment used by Jason Day, Jeff Maggert, Thomas Pieters, and Dicky Pride. A photograph of a golfer is included. To the right of the article is a 'GOLF DAILY' sign-up banner and a 'crestner HEALTH' advertisement with the text 'Get your swing back. Comprehensive Physical Therapy'. Below the article is an 'EDITOR'S PICKS' section featuring a 'Deutsche Bank Championship' and a 'Pursuit of No. 1 unites new Big 3'.

PGM Tour
DEUTSCHE BANK CHAMPIONSHIP
View Tee Times >

1 J.DAY -3 8 T2 M.HOFFMANN -2 12 T2 G.WOODLAND -2 10 T2 HJ < > *Titleist*

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UL WORKING FOR A SAFER WORLD SINCE 1894 [LEARN MORE](#)

GOLF DAILY
LATEST NEWS, SPECIAL OFFERS & MORE
[SIGN UP](#)

SPOTLIGHT Play Chambers Bay Grill Room The Golf Book Golf Channel Academy Deutsche Bank Championship FedEx Cup Morning Drive TPC Boston

Equipment Insider Contributions from writers and editors on the Golf Channel Digital team. **GOLF**

What's in the bag: Day, Maggert, Pieters, Pride
By Golf Channel Digital August 31, 2015, 12:43 pm

Facebook Tweet G+ Share Email

Jason Day and Jeff Maggert won for the fourth time this season on their respective tours, Thomas Pieters won his first **European Tour** title, and **Dicky Pride** earned his **PGA Tour** card for next season with a win on the Web.com Tour. Here is what's inside their bags:

Jason Day: The Barclays, PGA Tour

Driver: TaylorMade R15 (10.5 degrees, Mitsubishi Rayon KuroKage S TINI 70X shaft)
3-Wood: TaylorMade AeroBurner 39L (16.5 degrees, Mitsubishi Rayon KuroKage S TINI 80X shaft)
2-Iron: TaylorMade RS2 (True Temper Dynamic Gold X7 shaft)
4-PW: TaylorMade RSi TP (True Temper Dynamic Gold X7 shafts)
47-Degree Wedge: TaylorMade Tour Preferred EF Tour Grind (True Temper Dynamic Gold Tour Issue S400 shaft)
52-Degree Wedge: TaylorMade Tour Preferred EF Tour Grind (True Temper Dynamic Gold Tour Issue

crestner HEALTH
Get your swing back.
Comprehensive Physical Therapy
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EDITOR'S PICKS
Deutsche Bank Championship
Pursuit of No. 1 unites new Big 3

Customer Relationship Management

Help her **CHOOSE** the right care.

Make it easy for her to **CONNECT**.

Help her **MANAGE** her care.



New Patient Acquisition

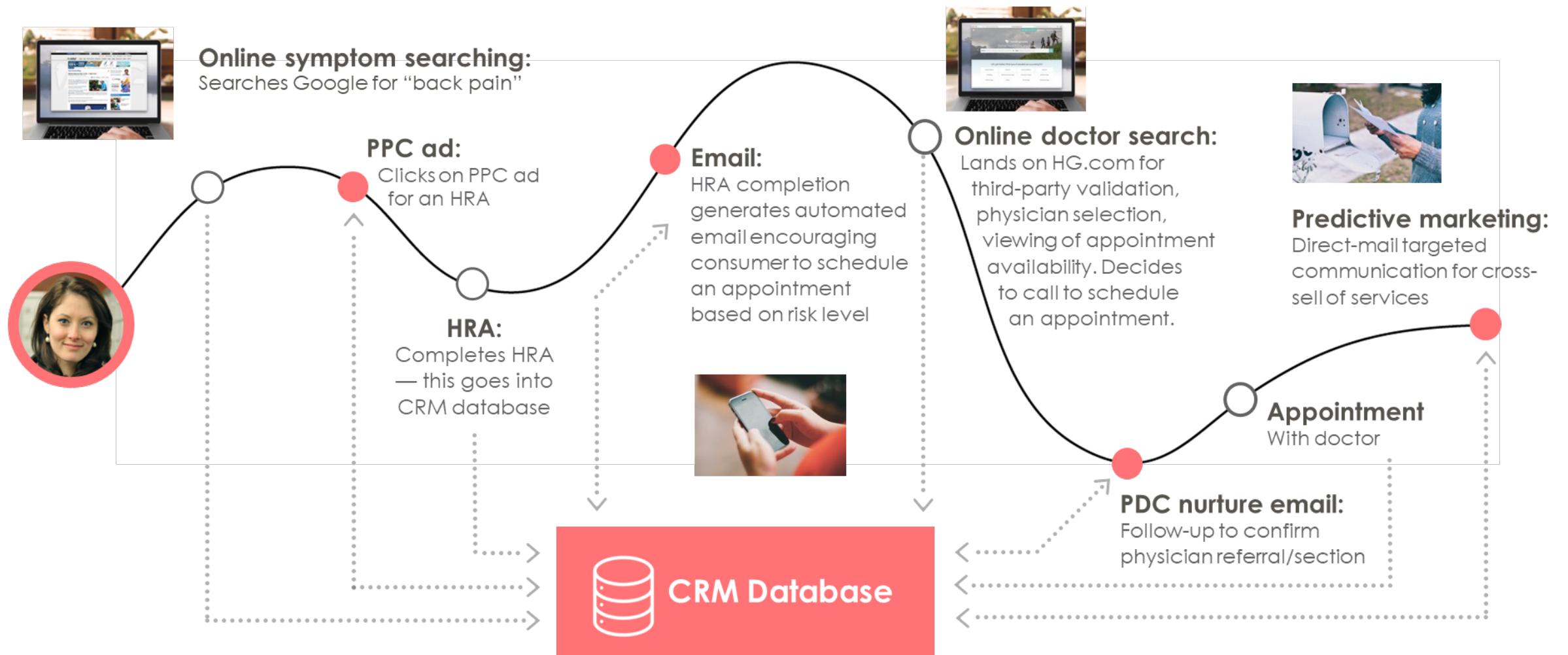
Consumer Engagement and Access

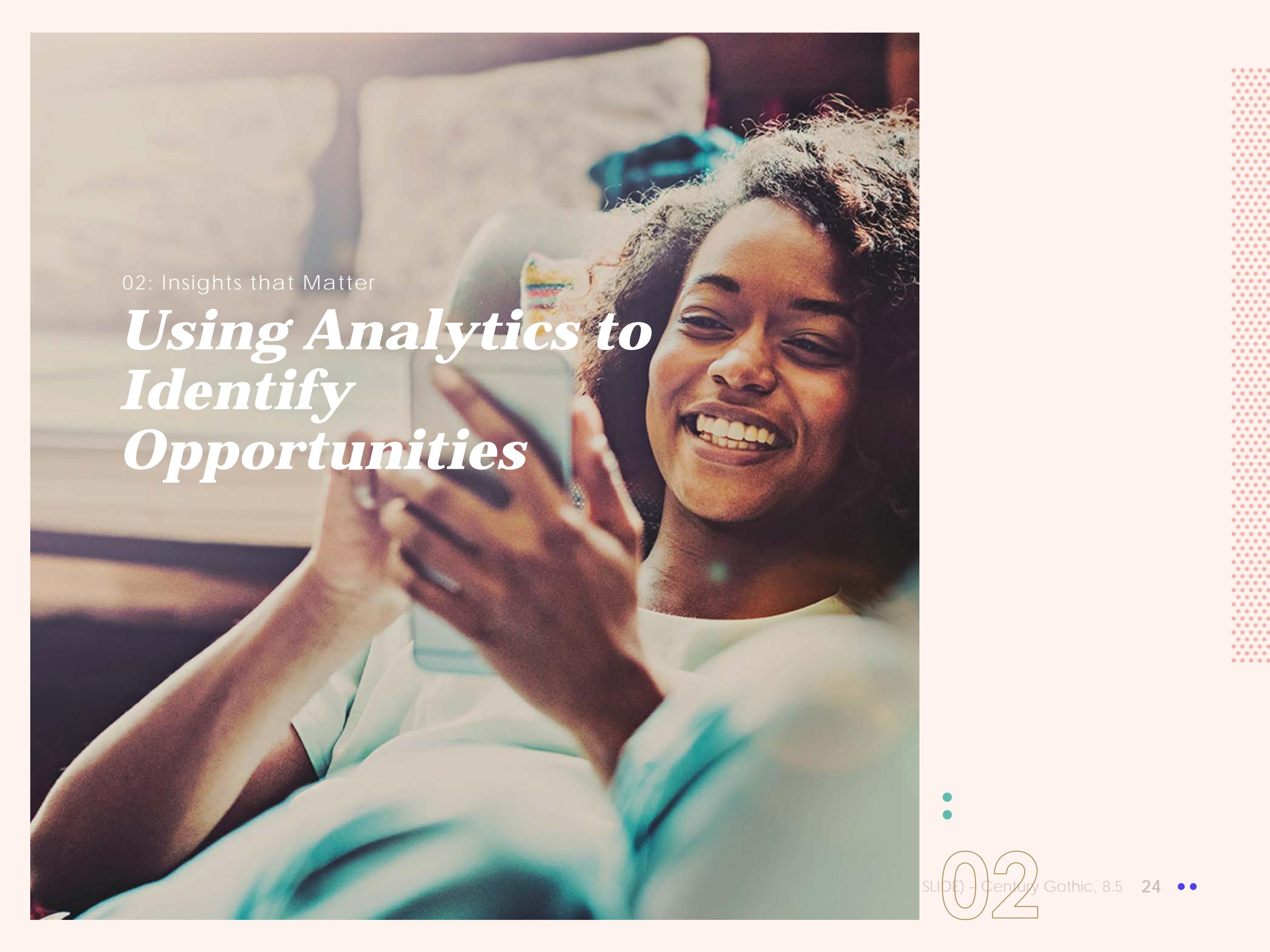
Patient Retention and Population Health Management

Professional Services = Extension of Your Marketing Department

Enterprise Marketing Platform = 360 Degree Single Source of Truth

Data + Platform = Strategic CRM





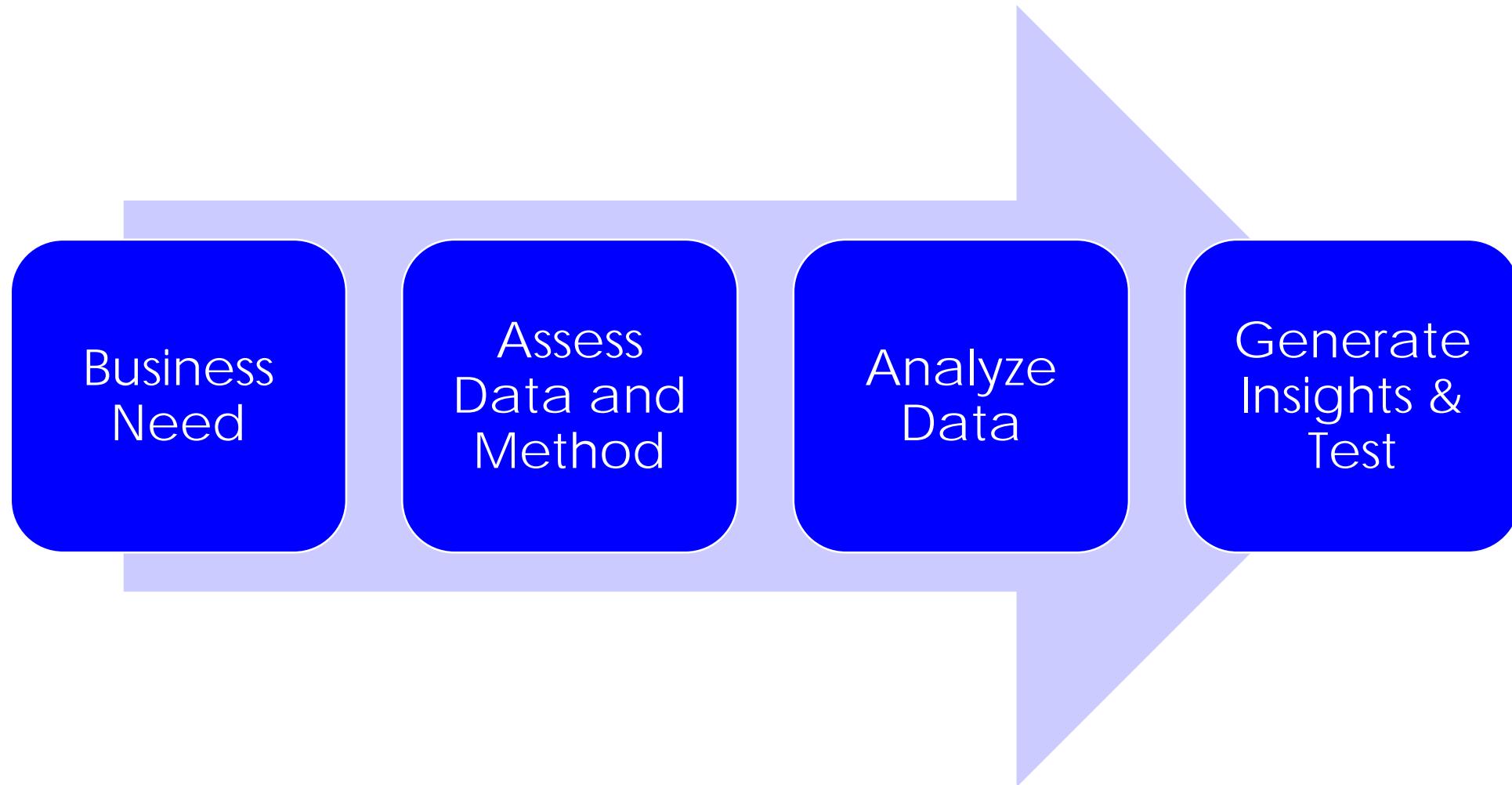
02: Insights that Matter

Using Analytics to Identify Opportunities

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●

02

Using Analytics to Identify Opportunities



Types of Opportunities

Diverse Opportunities

A number of research problems can be addressed with analytics.

How do I maximize service line opportunities?

What market areas provide the most potential?

What households are driving the most value?

How are my access points being utilized?

** This style can be used for footnotes*

Types of Problems & Opportunities

Examples of problems around consumer and household value

How do I maximize service line opportunities?

What market areas provide the most potential?

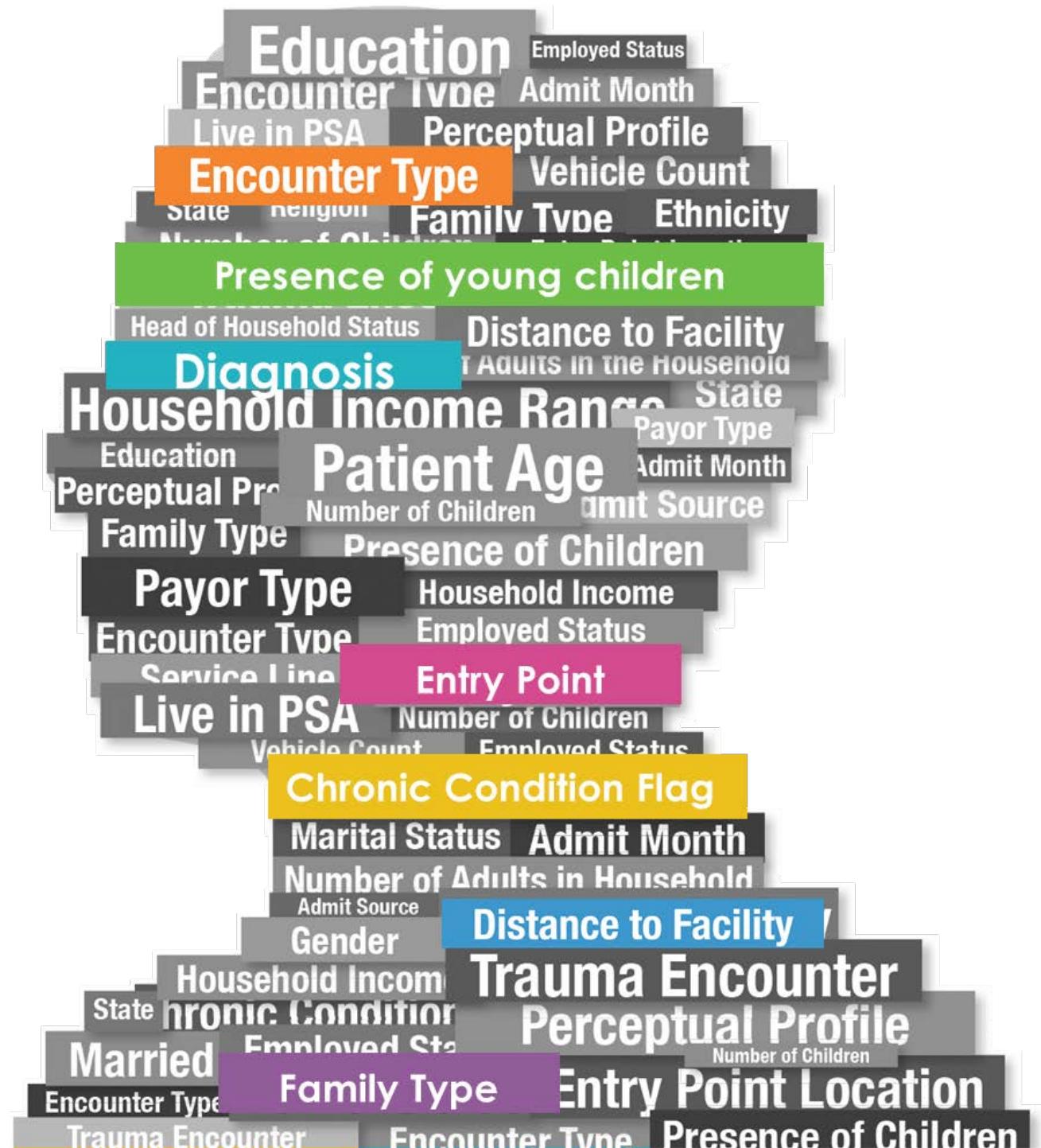
What households are driving the most value?

How are my access points being utilized?

- Which households bring in additional household members?
- Which households are most likely to have encounters in key service lines?
- What are the drivers of retention (likelihood to re-engage in the system over time)?
 - How can I improve those results?
- What types of households are driving the most contribution margin or revenue?
 - And how can I find more of them?

** This style can be used for footnotes*

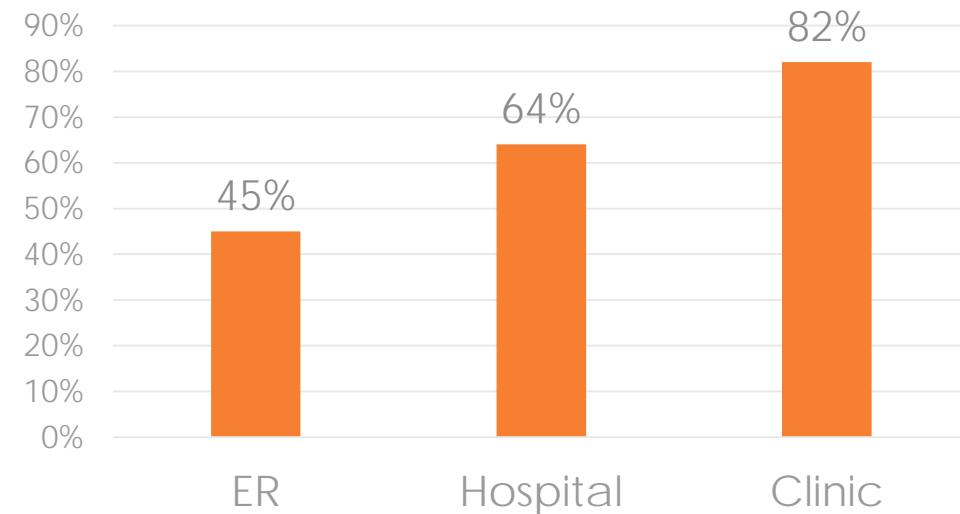
So what factors are associated with retention rates?



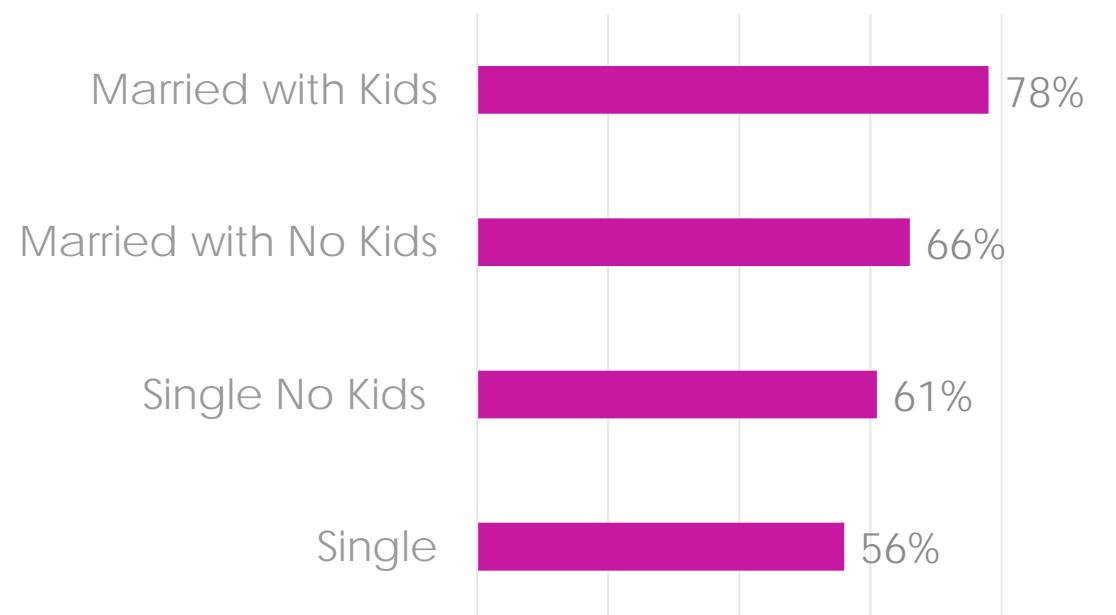
Types of Insights

In this example, for new patients, entry points and household type, were two factors strongly correlated with retention rates.

Retention by Entry Point



Retention Rate by Household Type



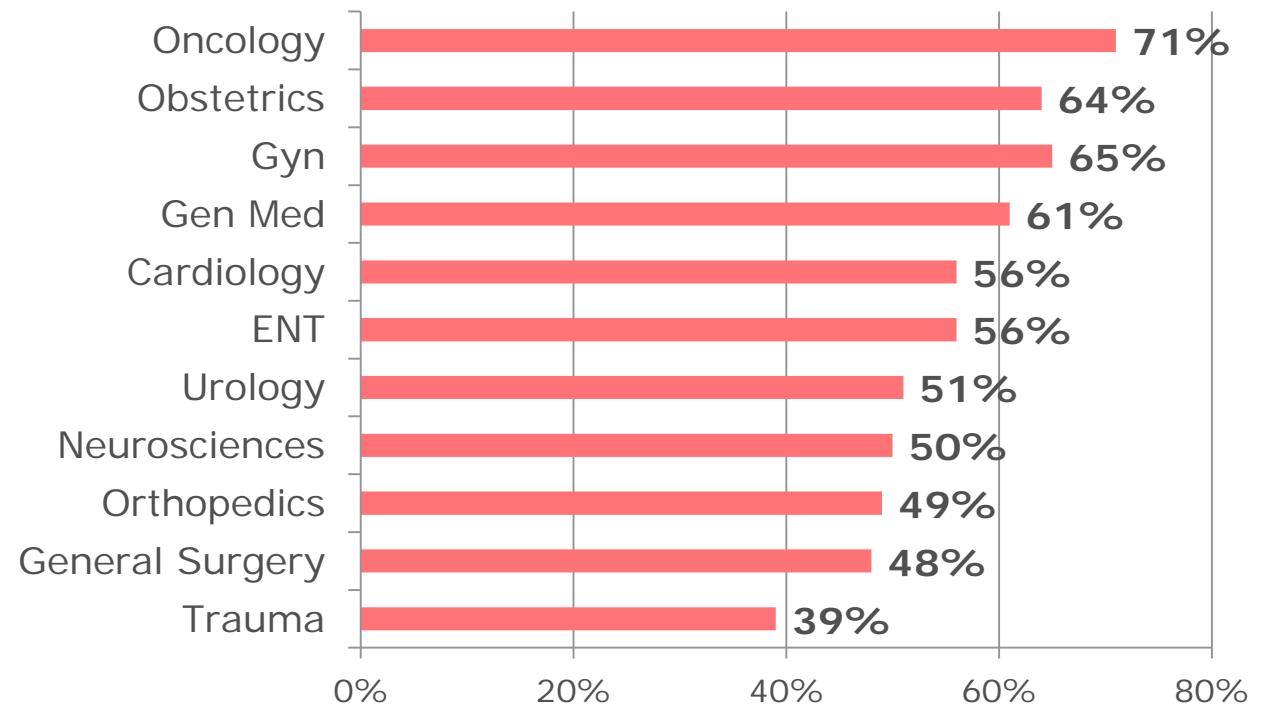
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Types of Insights

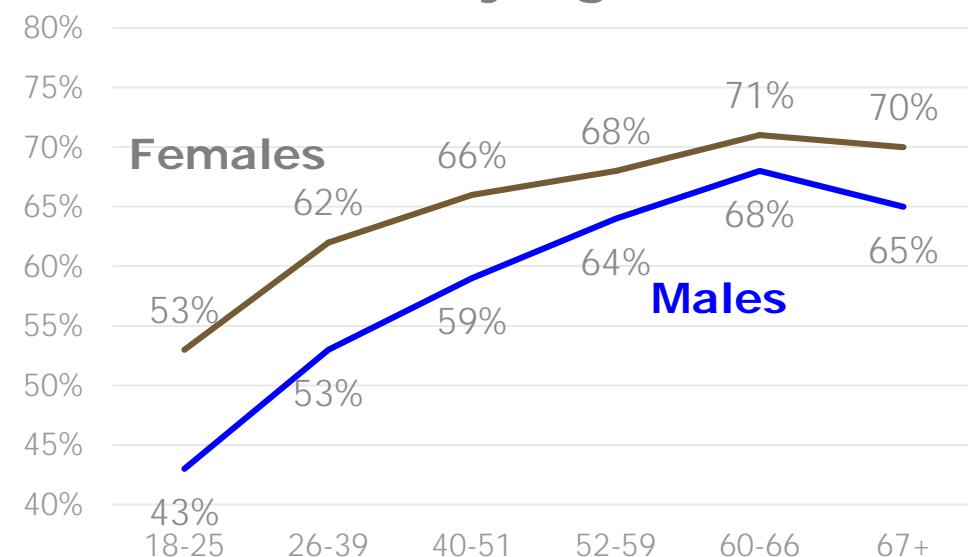
The service line associated with the initial patient encounter was indicative of retention.

Further, the interaction of age and gender played a role.

Retention by Initial Service Line



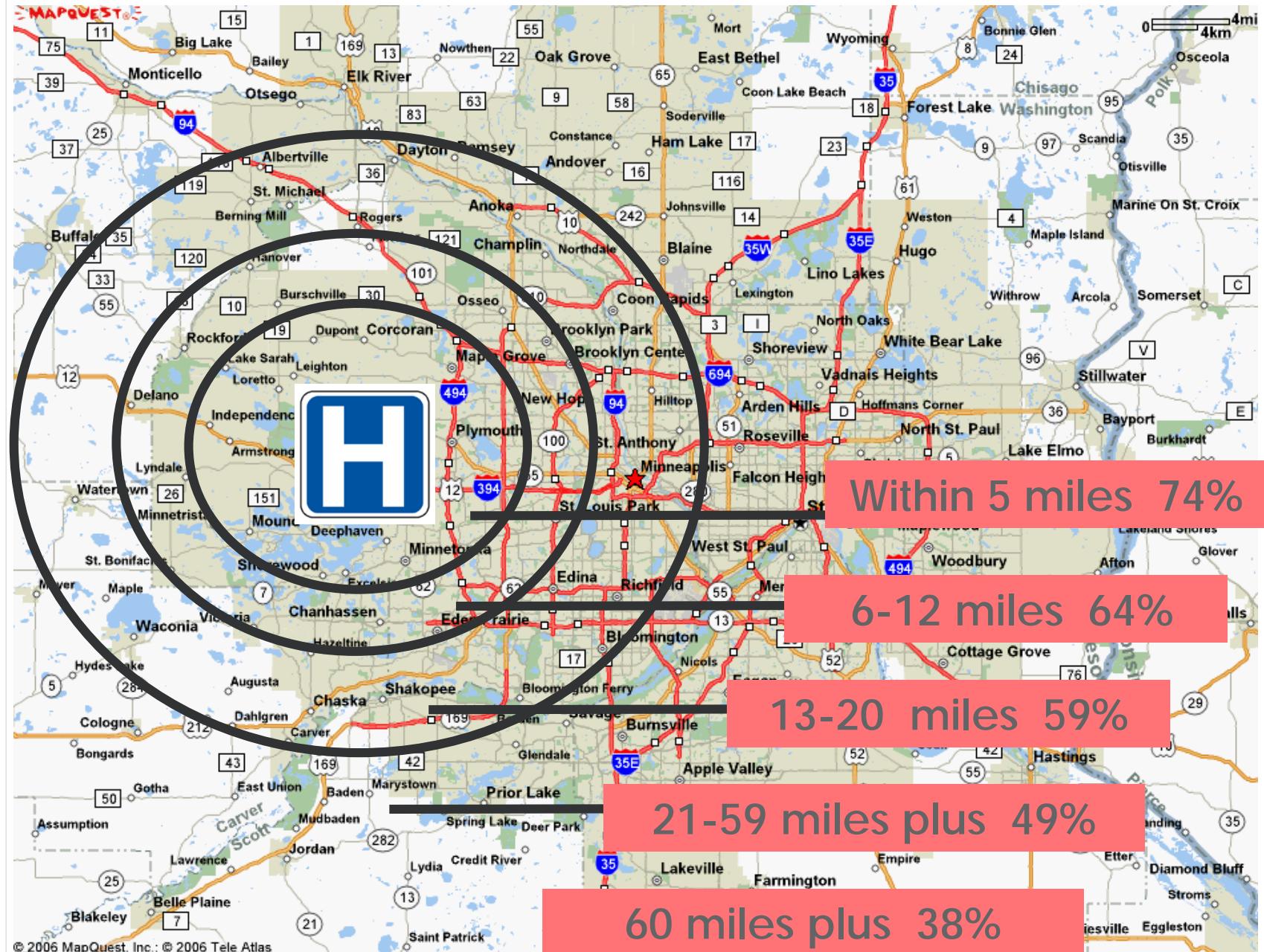
Retention by Age/Gender



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Types of Insights

As one might expect, proximity of home address to the facility of their first visit, was highly correlated with the likelihood of re-engaging with the system.



* This style can be used for footnotes

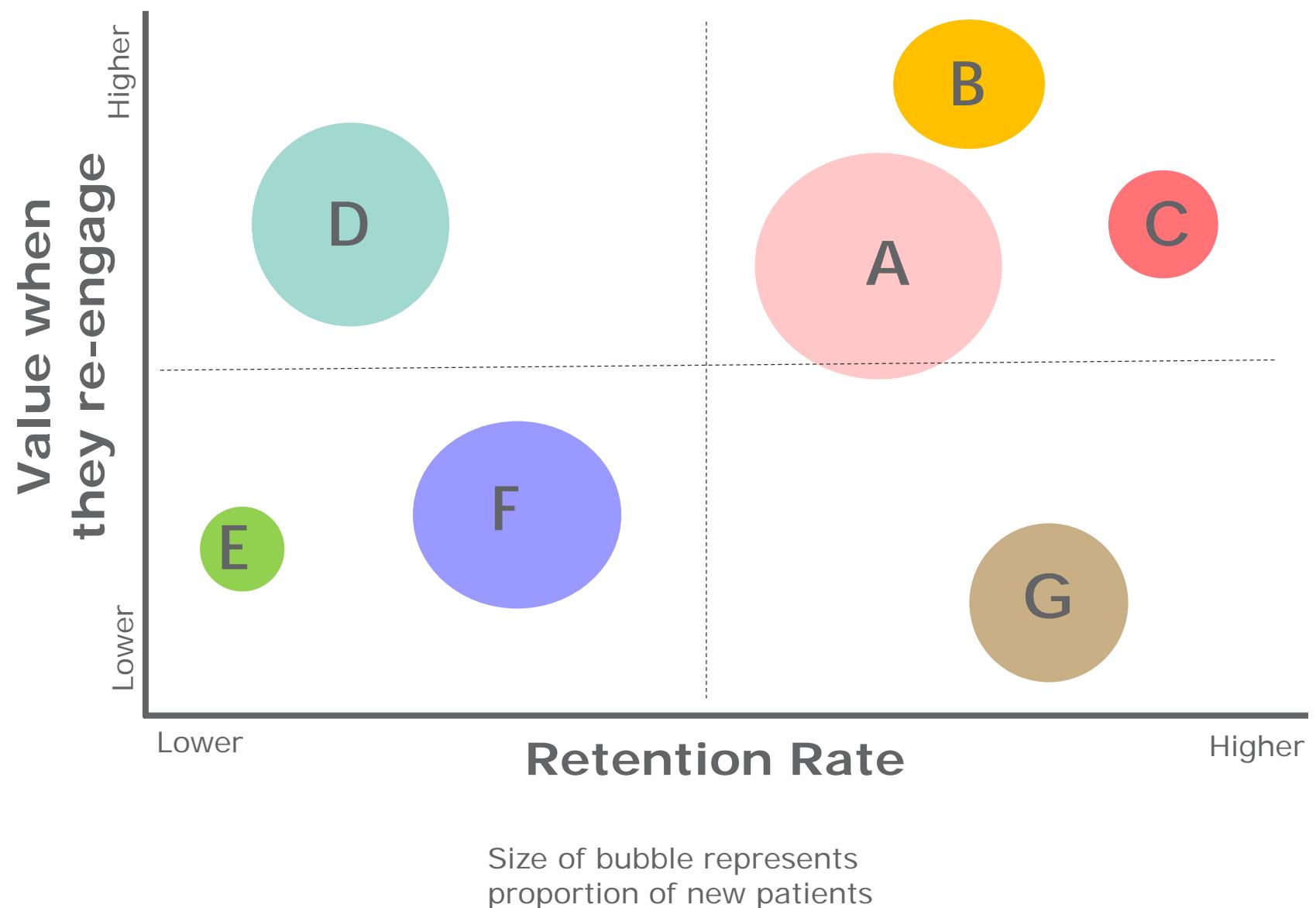
Putting It All Together

Looking at the most significant factors, we can create strategic cohorts that can help us assess potential, prioritize opportunities and provide the foundation for an engagement strategy.

What cohorts have the most potential if retention improves? Where should your investment be? What else do I want to know about these groups?

** This style can be used for footnotes*

Cohort Analysis



Applications

There are a number of ways to apply the output.

The more the research is tied to the strategy at the on-set, the higher the likelihood that it will lead to action.

Relationship Marketing

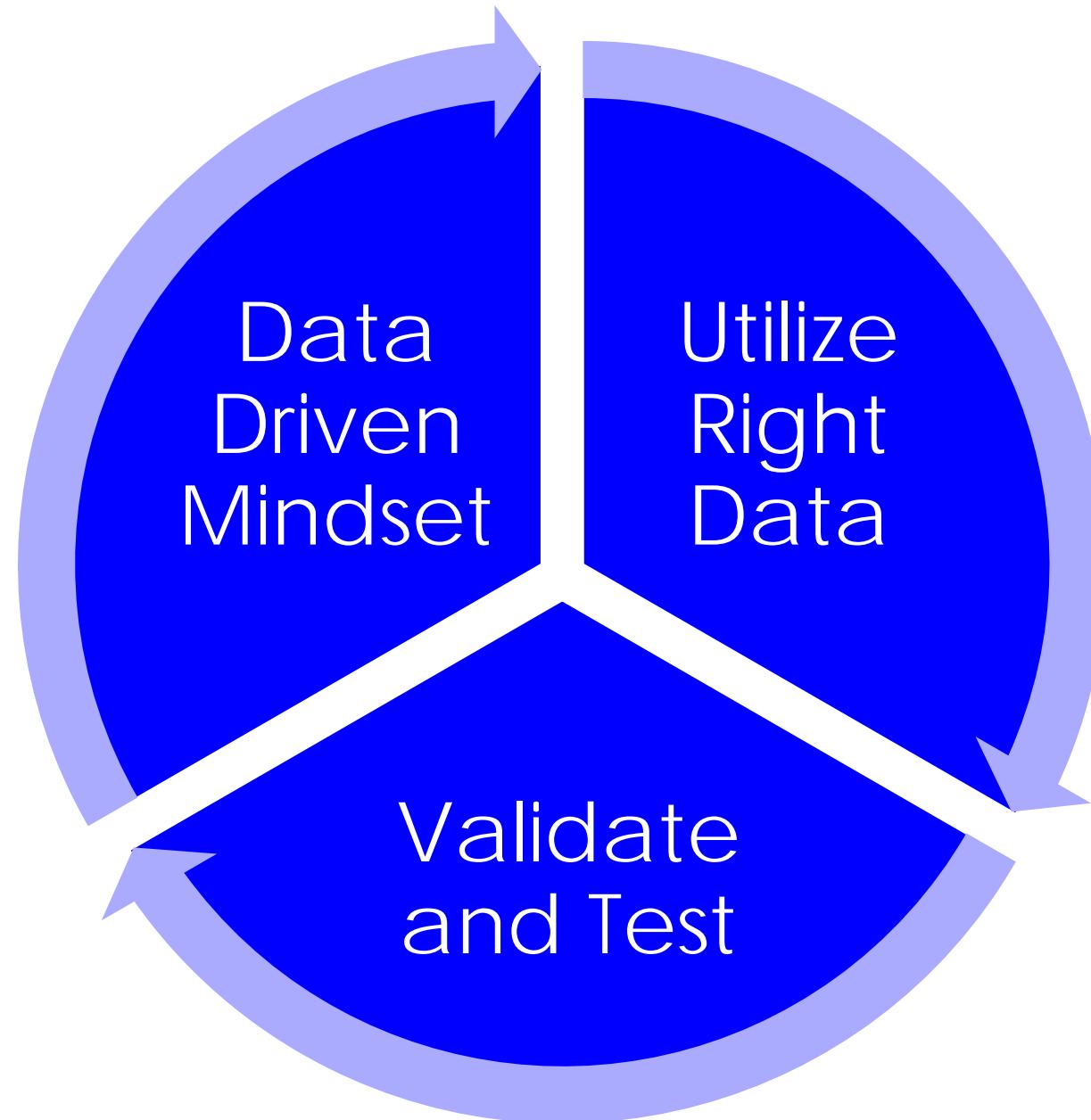
Operational Triggers

Inform Acquisition Campaigns

Scorecard Metrics

** This style can be used for footnotes*

Keys to Success



Packaged vs Custom Research

Analytics can be delivered in different ways

Analytics via Packaged Solution

- Typically more recurring business needs
- Well defined metrics and views
- Relatively easy to understand the output
- Ability to slice-and-dice across different views

Analytics enabled by CRM

- More complex problems
- May need to define new metrics and attributes
- Perhaps augmented with additional collateral (e.g. personas) to help tell the story

- 
- *Consider new ways of utilizing data within your marketing department*
 - *Lean on data analysis and insights to inform your approach to business objectives*
 - *Select a partner who can help you transition from traditional to strategic CRM*

Thank you.

