Whitepaper

Perfect your pipeline

How to use data and content strategy to optimize revenue for high margin service lines

Created in partnership by:

CARE SHERPA

WriterGirl

Introduction

Hospitals and health systems spend millions on marketing campaigns and digital front door strategies. A 2018 survey by the Society for Health Care Strategy & Market Development (SHSMD) found the average annual hospital marketing budget to be $5.4 million.

Many of these dollars are put towards growing profitable elective procedure volume in high margin service lines like orthopedics and bariatrics. But marketing spend in these areas doesn't always translate into revenue. All too often, there's a breakdown in the pipeline that's designed to turn leads into downstream results.

That's why **WriterGirl** and **Care Sherpa** partnered on this white paper. In it you'll find guidance on how to:

- Map a service line's patient journey to an accurate, data-driven marketing funnel
- Identify and stop leakage by applying marketing and sales funnel fundamentals
- Use deep analytics and tracking to understand needs and emotions
- Develop an optimized strategy for delivering valuable, personalized content in the exact right way at the exact right time

We hope you find this white paper helpful as your organization invests in perfecting your pipeline.

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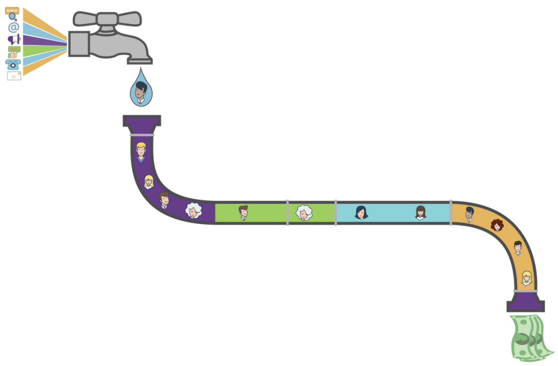
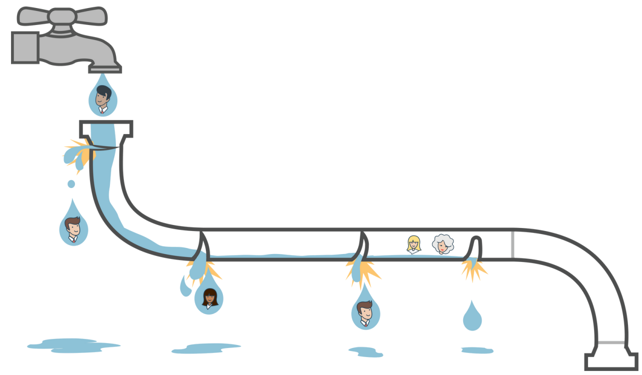
Pipeline realities

Perfect sales pipelines don't exist, especially in healthcare. Care Sherpa, a marketing lead follow-up and new patient concierge services company, collected data that measured more than 250,000 interactions. The results showed that more than 81% of all healthcare leads never convert. So, where are the leaks?





Images: Examples of a perfect pipeline and a realistic pipeline

Revenue can be lost at many points along the pipeline and for many reasons, including:

- Capacity challenges
- Nonresponse or slow response to leads (for example, Care Sherpa data indicates it takes 72 hours, on average, for an organization to respond to a lead, if they respond at all)
- Lack of follow-up after an initial consultation
- Inconsistent outreach (for example, a patient may be contacted once but never again)
- Canceled and rescheduled appointments
- Unclear paths to revenue, with confusion or misunderstanding around the consumer journey, leading to nonstrategic marketing spend
- Long sales cycles (for example, according to Care Sherpa data, a bariatric surgery patient may not have their first appointment until 18-24 months after they first engage)

Why are healthcare organizations behind when it comes to adopting a sales funnel approach?

Organizations may suffer from political siloes, operations issues at a macro level, limited and competing resources, a disconnect between marketing and operations, and even a lack of data because of that disconnect. This is an industry challenge, but it's starting to change. Healthcare brands are beginning to build the infrastructure needed to gather high-quality data to highlight gaps that can be targeted for optimization.

All leads are not created equal

Care Sherpa data shows that just over **20% of all patient leads are true "new patient opportunities."** These are people in the market who are seeking care for a specific procedure. They have the medical and financial qualifications and ability to move forward.

Other leads fall into a variety of categories. Are they nonresponsive? Are they "just browsing"? Are they an appropriate candidate for the treatment in question?

Better understanding the leads in your pipeline will allow for more targeted outreach. Online screening tools and building a buyer profile are two ways to gain knowledge about your leads.

Using health risk assessments to identify needs

The engagement and information sharing created through health risk assessments (HRAs) can greatly benefit healthcare consumers and health systems looking to better understand their potential patient population.

Care Sherpa data shows that **more than half of HRA leads are high value, strategic priority candidates.** HRAs can help you identify leads most likely to convert to patients.

These screening tools help individuals identify and understand their health risks and monitor health status over time.

Priming your pipeline

The path to revenue begins well before potential patients enter your sales funnel. Consider how you can use content to encourage action. A content strategy ensures your content:

- Accurately reflects your offerings
- Answers common questions consumers have about the conditions you treat, services available and accessing care
- Highlights your competitive differentiators and helps consumers feel confident about engaging with your brand
- Is optimized for search engines
- Is written at a grade reading level that's accessible to your market

HRAs can:

- Educate patients about their risk factors for a condition
- Help patients take an active role in their health
- Lead to a health screening (or more frequent screenings or both)
- Start or inform conversations between patients and providers

Organizations gain the most value out of HRAs by engaging a content strategist to help with online placement and promotion, and identifying best uses for collected data.

Creating buyer profiles to understand motivation

Creating buyer profiles is crucial when it comes to understanding healthcare consumers. These profiles enable healthcare providers and organizations to gain deep insights into the needs, preferences and behaviors of their target audience.

By developing comprehensive buyer profiles, organizations can identify patterns, trends and demographic characteristics that influence consumer decision-making.

With this knowledge in hand, organizations can tailor services and communication strategies to better meet patients' specific needs and expectations.

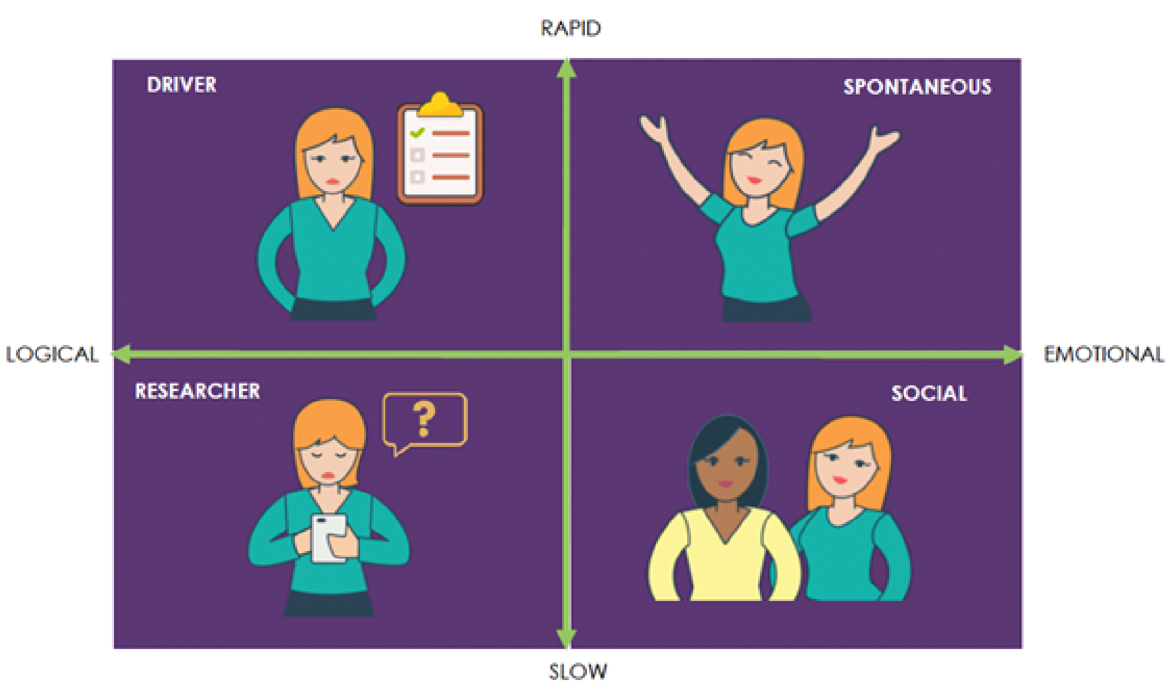


Image: Examples of buyer profiles

Take a trip along the patient journey

Identifying and understanding your leads is the first step toward growth and increased revenue. The next step is to determine where your organization has gaps in experience.

To do this, organizations must analyze a service line's end-to-end patient journey experience. This analysis offers understanding about each touchpoint a consumer has with your organization — from before they decide they want care through their first appointment, treatment and follow-up.

Analyzing the patient journey experience helps you understand the critical decision-making moments — and opportunities for reassurance — along your process. From there, you can identify areas to optimize, including where content can be served up to patients to plug leaks.

Care Sherpa worked with one surgical group to audit the patient experience from initial access through treatment and beyond. Despite receiving hundreds of leads per month, this provider had flat growth within its bariatric service line. A lack of lead follow-up resulted in 83% leakage. The provider also faced high staff turnover in both clinic and coordinator roles. They also saw changes to the payor mix, which created financial barriers for some potential patients. A deeper look at their data and processes showed a gap between the first appointment and treatment.

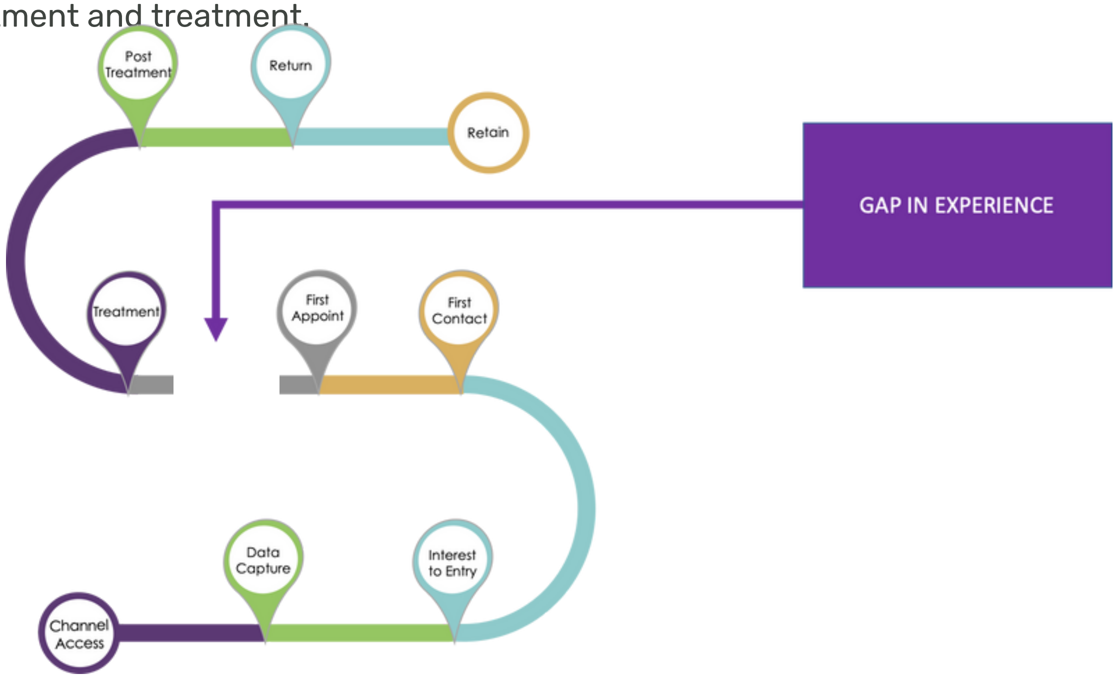


Image: Example of the patient journey, highlighting the gap between the first appointment and treatment

When another surgical center was experiencing flat lead volume growth and very limited leads from high margin, high value procedures, they turned to Care Sherpa for help.

A deeper look at the center's orthopedic leads pipeline found that — consistent with other practices — about one-fifth of leads were ready to be moved along the sales funnel. Another 22%, while not ready, could be ripe for nurturing. But for this client, the gap in experience fell before the first contact with the provider.

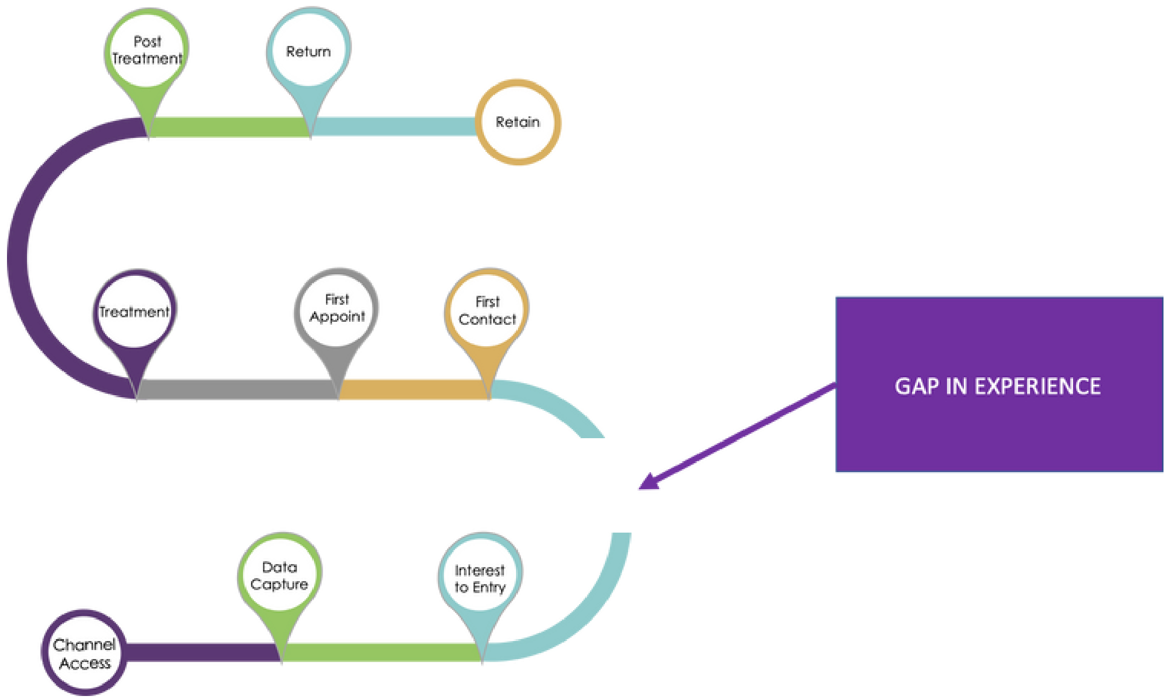


Image: Example of the patient journey, highlighting the gap between the interest to entry and first contact

Engaging leads with meaningful content at each step of the process can increase the likelihood and speed they convert. Care Sherpa has found **good content can increase the chance of converting leads to patients by 53%.**

Example of an effective content journey

Send a health risk assessment to a potential patient to help them evaluate their knee pain

After the assessment, add them to an email nurture where they receive content on topics like therapy and exercises

Send an on-demand video featuring an orthopedic surgeon doing a Q&A on "When it's time to consider knee replacement"

Send an invitation to schedule an appointment

Personalized patient journey mapping: using content strategy to fix leaks along the pipeline

WriterGirl, a healthcare writing and content strategy company, helps clients understand and document the steps along a patient journey. They do this by analyzing existing content and consulting with providers and staff.

Once the patient experience is documented, and gaps or opportunities become clear, WriterGirl recommends content assets. These assets are designed to align with client needs and marketing goals. Just as important, the assets meet the needs of individual patients as they move through their journey.

WriterGirl helps organizations take this work a step further through personalization. Using data, they can create more unique experiences for patients and potential patients — and meet their needs before they even ask.

What is personalized patient journey content?

Personalized patient journey content is customized marketing and communications sent to someone over time. It's thoughtfully engineered to provide a meaningful experience at every stage of a person's healthcare journey. And healthcare consumers increasingly expect and prefer personalized communications.

Personalization in marketing and advertising isn't new. But as data and marketing tools become more sophisticated, personalization strategies will too.

In healthcare, personalization is used to tailor content and connect with people who want and need specific services. By giving them information relevant to their journey, you go beyond simply marketing — you start to build trust. Personalization also means providing the right information at the right time and place. For example, millennials' aversion to phone calls may be meme-worthy, but don't laugh it off. Listen to their preferences. If text or email is preferred, that's how you should deliver content. Also, more and more consumers have begun to appreciate tools such as online scheduling. They want to self-serve and access care whenever they want and wherever they are.

Work smarter: data-driven content strategy solutions

Not all marketing teams and organizations have access to customer data and digital analytics. But when that information is available, it can be used to create successful content strategy solutions.

1

Conduct an audit

Step one is to conduct an audit of how consumers find, access and interact with your service line today. Content strategists with deep knowledge of healthcare can review the quality and performance of your existing digital content and recommend content solutions tailored to your brand, service and market.

Organizations like Care Sherpa complete the picture by analyzing electronic medical record (EMR), financial systems and customer relationship management (CRM) data, as well as nondigital interactions, such as phone or in-person touchpoints. With a clear picture of the patient journey, you can map it to a marketing and sales funnel and identify areas of leakage.

2

Collect your own data

Be sure to track the performance of every asset you develop to gather information, whether quantitative or qualitative. Test early and often, and remember, what gets measured gets done. Set key performance indicators (KPIs) and a clear timeline for measurement. What performed the way you expected it to, and what didn't?

Whenever possible, tie real dollars to conversions. For example, let's say you know that a certain number of prospects choose to have their baby at your hospital after they tour your birth center. Since those deliveries equal an average amount of revenue, you can understand the actual dollars coming from conversions of users registering online to tour your site.

3

Prioritize your to-do list

Keep team capacity and resources top of mind. Prioritize content creation or enhancing content assets according to their value and effort. What can be done quickly and easily to make a big impact? What can wait?

The best content for each stage of a patient journey

Early interest, pre-visit

You can use content to build trust with potential patients who are "kicking the tires" or shopping around for elective procedures. Offer easy access to informational articles or videos on topics like:

- How to know if you're a candidate for XYZ procedure
- What to expect before, during and after your procedure
- Patient success stories

This early point in the patient journey is also an ideal place to consider optimizing your keyword search. Keyword research and optimization are effective strategies for driving website traffic and building brand recognition and trust. Especially valuable are specific words and questions searched by users in your market. Consumers may ask things like:

- Is bariatric surgery covered by insurance?
- Do I need a referral to see a fertility specialist?
- How long is recovery after knee replacement?

You can use in-market search terms and phrases as inspiration for content development. For example, use keyword data to produce a video interview with one of your providers or to create topics for blog posts. Incorporate keywords and phrases in subheads on service line webpages structured to follow the patient journey. If you use questions as subheads, be sure to answer the query in the content that immediately follows.

Keyword success

WriterGirl worked with one health system to identify keywords and create content to improve web search, web traffic and brand awareness of their high-risk pregnancy service line. Newly developed content was published in January 2023. As the case study shows, since then, the health system has seen:

- Double the pageviews and triple the average time spent on a page
- A significant increase (from 250 to 400) in the number of ranked organic keywords
- A move from zero to 3,500 impressions for a specifically targeted keyword

First contact

Once patients have moved from interest to action, they may reach out in any number of ways. Consider every initial touchpoint (call center, chat, email, web form and even in-person visit). Develop scripting and messaging for each initial touchpoint to ensure a consistent and positive experience.

At this stage, patients may also seek support and resources that help them navigate paying for care. In an ideal world, providers would handle insurance verification. But patients may still need and want the ability to see what their insurance will cover. Offer up insurance checker tools or even create a script they can use when contacting their provider.

First appointment through treatment

A first appointment is a great step toward conversion, but the deal isn't done just because a patient has met with your provider. Elective procedure patients who have completed their first appointment are still in buying mode and may be doctor shopping. Consider sending a simple follow-up message thanking them for visiting, touting your providers' expertise and offering links to videos or additional resources. Doing this can increase how fast they'll receive treatment and where they're likely to go for it.

Don't be afraid to be direct. Ask for their business, highlighting those brand or service differentiators you know make you stand out, and confirm next steps.

One Care Sherpa client saw a 13% increase in conversions in less than two months by implementing post-appointment follow-up messaging.

Post-care, monitoring and follow-up

Your relationship with patients isn't over just because treatment is complete. Retention is key to future interactions. And the way you handle the post-care phase can be critical to promoting a positive brand experience.

Offer patients information about post-procedure care and give them opportunities to share feedback. Use that feedback to improve your patient journey.

Conclusion

It's an increasingly competitive market. And many hospitals and health systems are still reeling from the financial challenges caused by the COVID-19 pandemic. Shoring up a leaky pipeline is critical to growing patient volume, enhancing profitability, making strategic decisions and proving the value of your marketing activities to the C-suite.

Aligning with operations or seeking partners who can help connect the dots and gather data is an important first step toward understanding opportunities for optimizing your sales funnel. Armed with that data, you can develop (or partner to develop) a well-executed content strategy that will improve your ability to attract and convert qualified leads.

Uncovering needs and creating personalized messaging, delivered when it matters most, can reduce leakage and perfect your pipeline.

A parting reminder ...

Do you know the number of consults that result in an elective procedure? Many organizations aren't tracking this critical metric. If you're one of them, take the steps needed to find out. Keep tabs on how the metric may fluctuate as you implement content and patient experience strategies and solutions. These can strengthen your pipeline and illuminate your sales funnel.

About the authors

About Care Sherpa

Care Sherpa elevates the patient experience and revenue for medical services. Care Sherpa provides a tech-enabled revenue growth service that maximizes healthcare conversions for patients utilizing personalized Ai, intelligent automation, and live-agent concierge services to create the fastest conversion experience for patient leads. Visit **caresherpa.com** to learn more.

About WriterGirl

WriterGirl is a content agency of more than 100 writers, project managers, editors and strategists. We're seriously into healthcare and all industries related to it. Whether you're in the business of delivering care — or delivering goods and services to those who do — you can count on us to create content that builds relationships. Just say the word and we're on it. Visit **writergirl.com** or email **hello@writergirl.com**.