SHSMD24 CONNECTIONS
Health Care Strategy & Market Development
October 13-15 | Denver

Innovative Approaches to Leveraging First-Party & Third-Party Data for Patient Acquisition

Alex Kemp, Senior Director of Analytics, Cardinal Digital Marketing

AHA Events

Outline/Agenda

- Leveraging First-Party Data for Optimizing Patient Acquisition
- Utilizing Claims and Payer Data for Highly Targeted Campaigns
- Developing Provider Referral Strategies to Augment Patient Acquisition
- Key Takeaways and Implementation Steps
- Learning Objectives:
  1. *Understand how to effectively use first-party data to optimize patient acquisition strategies.*
  2. *Learn how to leverage third-party claims and payer data for advanced targeting.*
  3. *Discover strategies for refining provider referral campaigns to increase patient acquisition.*

Leveraging First-Party Data for Optimizing Patient Acquisition

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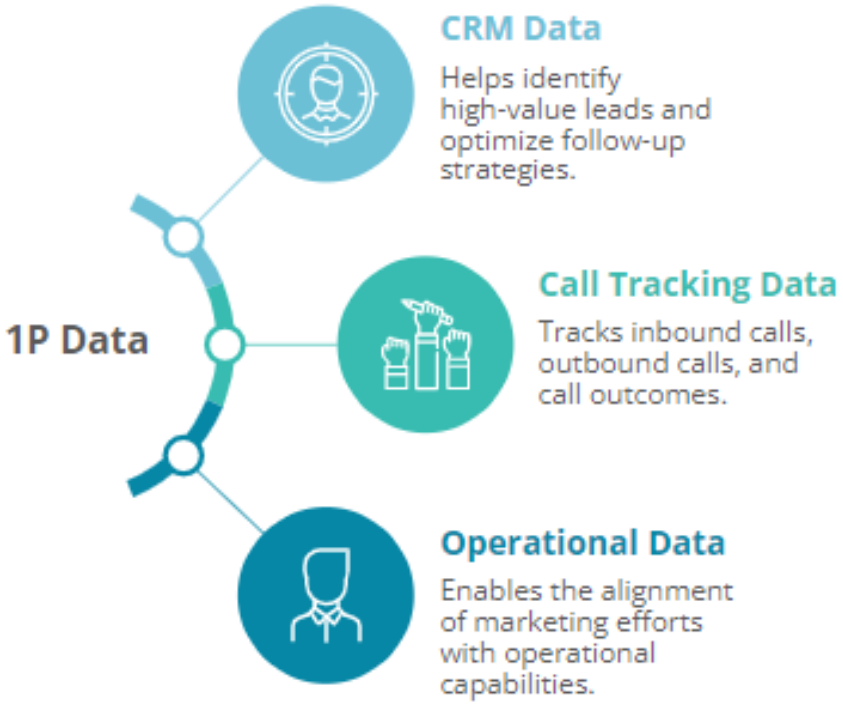
Understanding First-Party Data Sources

Maximize the value of data your organization already collects.

- Provides insights into patient behavior and acquisition funnel.
- Helps identify gaps in the patient acquisition process.



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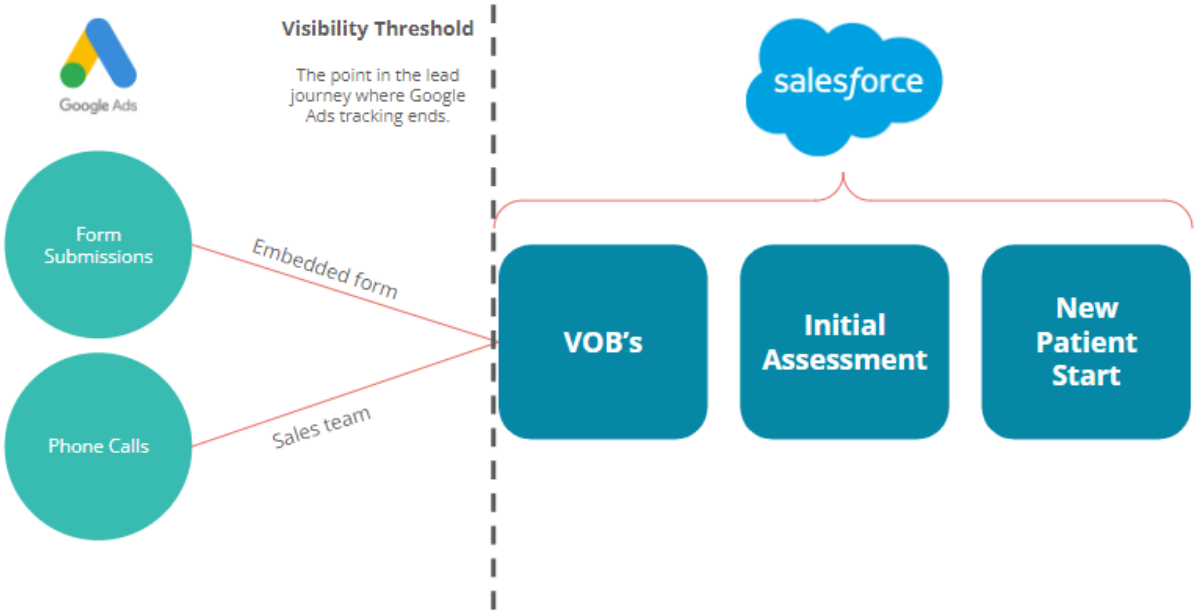
Use Case – Leveraging CRM Data for Optimizing Patient Acquisition

- **Challenge:** When CRM data isn't connected to ad platforms, you're only measuring up to the lead stage, limiting the ability to optimize campaigns based on *true patient outcomes.*
- **Impact:**
  - Marketing campaigns are optimized based solely on lead volume rather than quality.
  - Leads that convert into actual patients remain unidentified in the ad platforms, reducing the effectiveness of automated bidding and targeting strategies.
  - Difficulty in understanding which ad efforts drive real business impact, such as new patient appointments or completed treatments.



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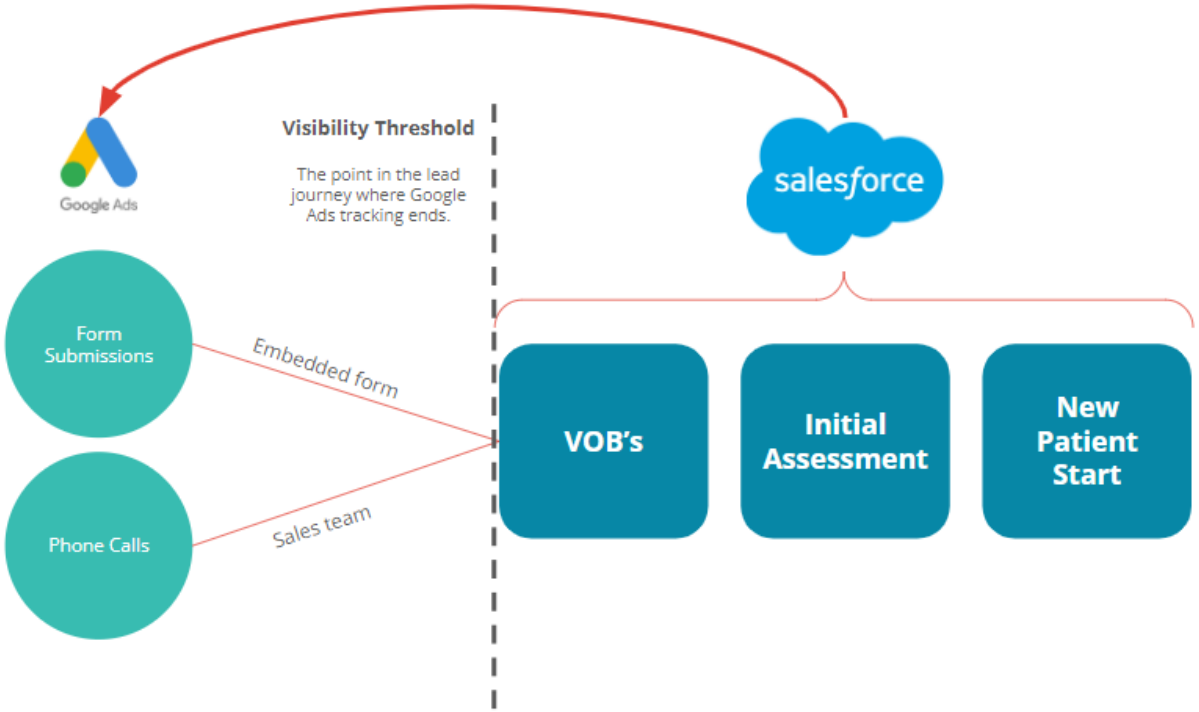
Use Case – Leveraging CRM Data for Optimizing Patient Acquisition

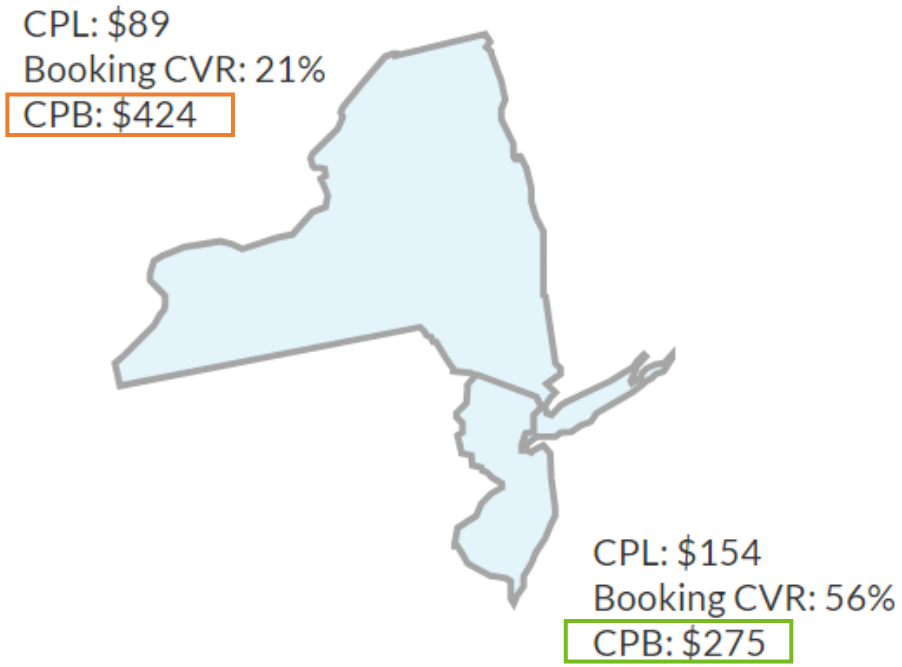
Solution: When connecting your CRM to ad platforms is not viable, use CRM data to back into the optimal campaign strategy.

- Analyze CRM data to identify which leads are converting into booked appointments and which are not, then use these insights to inform campaign decisions manually.
- Adjust campaign targeting, bidding, and budget allocation based on CRM insights to prioritize high-quality leads.



Use Case – Leveraging CRM Data for Optimizing Patient Acquisition

- **Scenario:** For a client running Google Ads campaigns, the goal was to drive patient appointments.
  - *Observation:* While the New York campaign generated a higher volume of leads, the booking conversion rate for these leads was significantly lower compared to leads from New Jersey.
  - *Problem:* Leads from New Jersey were more expensive, but they converted into booked appointments at a higher rate. Google Ads continued to favor New York because it was generating more leads at a lower cost, even though these leads were less likely to book an appointment.
- **Outcome:** By leveraging CRM data to understand post-lead outcomes, we adjusted the strategy to allocate more budget toward New Jersey, despite the higher lead cost, resulting in an overall increase in booked appointments and campaign efficiency.



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Use Case – Leveraging Call Tracking Data for Optimizing Patient Acquisition

- **Challenge:** High lead volume does not always translate into booked appointments, and without understanding the reasons for non-conversion, marketing efforts can be misaligned.
- **Impact:**
  - Missed opportunities to refine targeting criteria and messaging based on specific conversion barriers.
  - Inefficient budget allocation towards leads that have low chances of converting due to identifiable reasons.

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Use Case – Leveraging Call Tracking Data for Optimizing Patient Acquisition

Solution: Use call tracking data to identify reasons for non-conversion and adjust campaign strategy.

- Analyze call tracking data to determine the top reasons why leads are not booking appointments. Use this information to refine audience targeting, adjust messaging, or even align operational processes (e.g., updating hours or improving call follow-ups).
- Prioritize budget allocation towards lead sources or demographics with higher booking potential, while addressing specific barriers (e.g., updating messaging to clarify accepted insurance).

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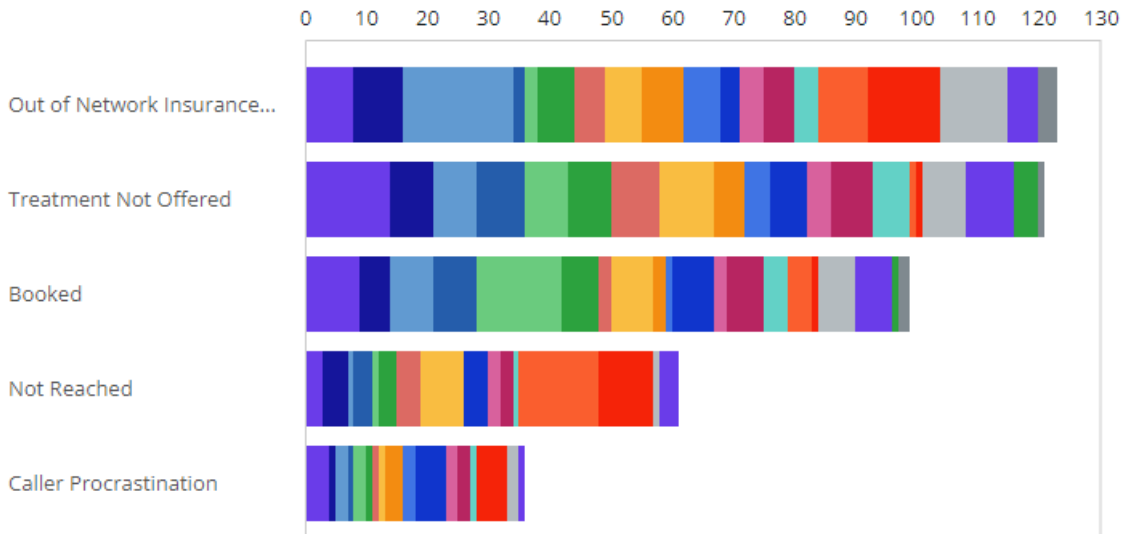
Use Case – Leveraging Call Tracking Data for Optimizing Patient Acquisition

- **Scenario:** Call tracking data revealed that a significant number of leads were not booking due to "Out of Network Insurance" and "Treatment Not Offered.“
  - *Observation:* The most common reasons for non-booking included insurance issues, unoffered treatments, and unreachable leads.
  - *Problem:* Continued spending on segments with a high incidence of non-conversion reasons led to suboptimal campaign performance.
- **Outcome:** By using call tracking insights, the marketing strategy was adjusted to:
  - Target regions where accepted insurance plans were more prevalent.
  - Update ad copy to clearly communicate offered treatments, reducing calls from unqualified leads.
  - Improve follow-up strategies for leads marked as "Not Reached" to increase the likelihood of booking.



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Use Case – Leveraging Operational Data for Optimizing Patient Acquisition

- **Challenge:** High volumes of missed calls during specific times and varying conversion rates among staff indicate a misalignment between marketing efforts and operational capabilities.
- **Impact:**
  - *Lost Opportunities:* Missed calls during high-traffic hours result in lower patient engagement and a higher drop-off rate.
  - *Inconsistent Performance:* Staff members with lower conversion rates may struggle to effectively manage the volume of leads, impacting the overall efficiency of patient acquisition efforts.

Staff Member	New Patient Leads	Booked Appointments	Conversion Rate
Caroline	324	56	17%
Latasha	259	54	21%
Aileen	230	43	19%
Linzi	92	23	25%
Victoria	28	7	25%

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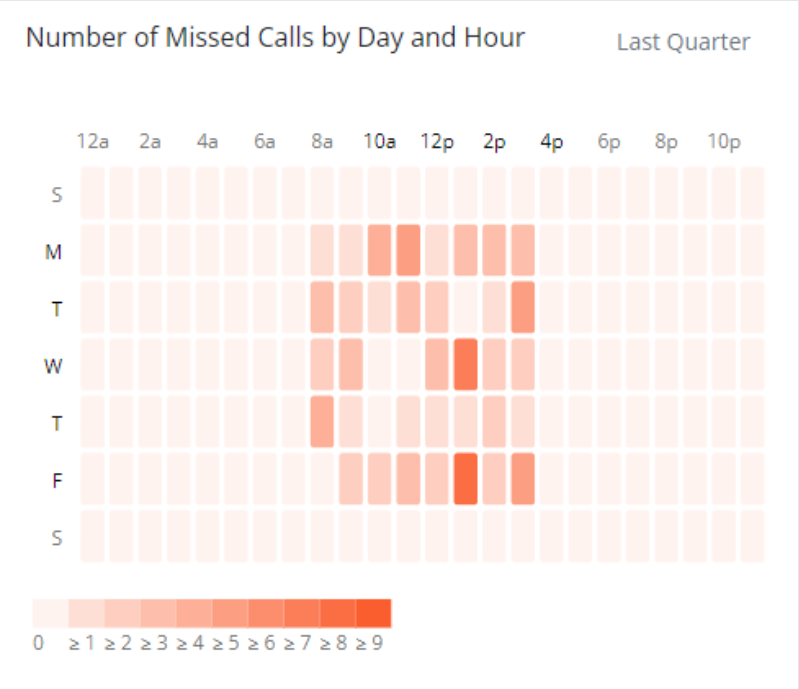
Use Case – Leveraging Call Tracking Data for Optimizing Patient Acquisition



The heatmap shows increasing staffing between 10 a.m. and 4 p.m. on weekdays, especially on Fridays, would capture more patient inquiries.

Solution: Leverage operational data to optimize staffing and marketing campaigns.

- Use insights to allocate marketing budgets to times when contact center staffing is sufficient to handle inquiries, reducing missed calls.
- Analyze staff performance data to identify training needs and implement best practices for engaging patients to improve booking rates across all staff.

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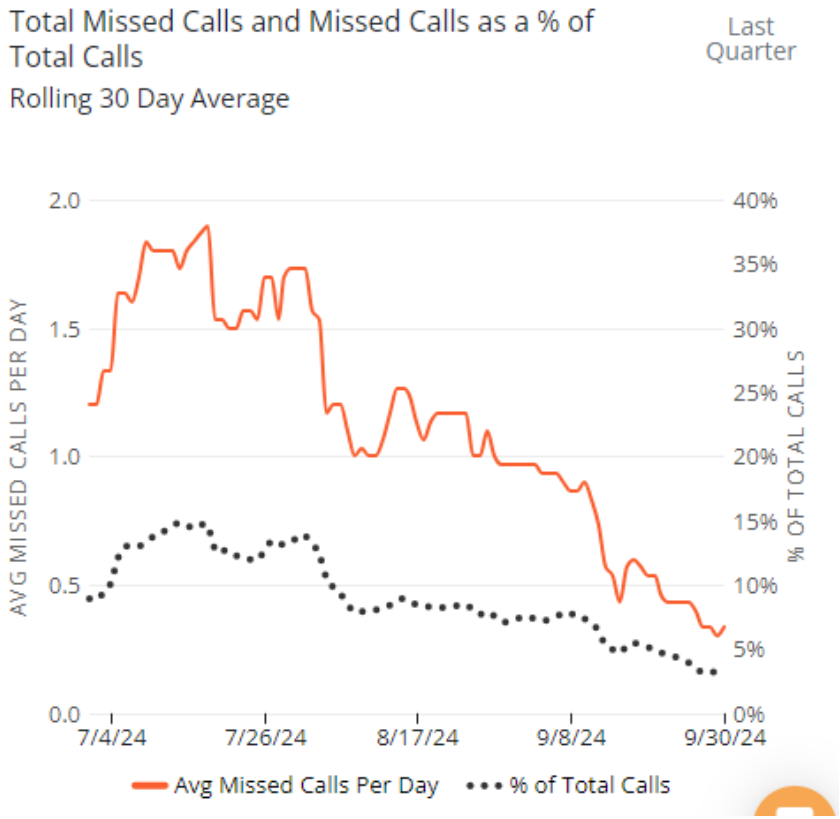
Use Case – Leveraging Call Tracking Data for Optimizing Patient Acquisition

- **Scenario:** Operational data showed a pattern of missed calls between 10 a.m. and 4 p.m., especially on Fridays. Additionally, certain staff members had lower conversion rates.
  - *Observation:* The heatmap revealed that staffing was inadequate during peak call times, while the staff performance chart showed variability in booking rates.
  - *Problem:* Marketing campaigns drove leads during times when the contact center was not sufficiently staffed, and some staff members were less effective at converting leads.
- **Outcome:** By using these combined insights, the client was able to:
  - *Reduce Missed Calls:* Optimized ad schedules and increased staffing during peak hours.
  - *Improve Conversion Rates:* Provided targeted training for staff members with lower conversion rates.



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Utilizing Claims and Payer Data for Highly Targeted Campaigns

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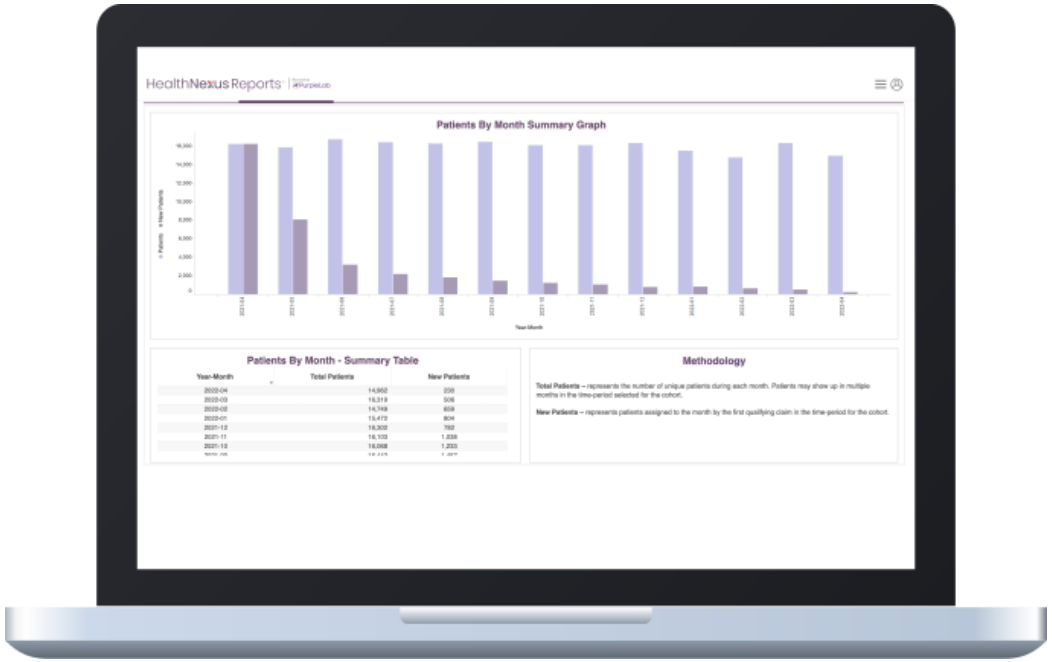
Introduction to Utilizing Claims and Payer Data for Targeted Campaigns

- **Claims Data**
  Collected from insurance claims submitted by healthcare providers to insurers, this data includes detailed information on patient diagnoses, treatments, procedures, and insurance coverage. It provides insights into healthcare utilization patterns by showing what types of services are being used and who is using them.

- **Payer Data**
  Sourced from insurance companies and healthcare organizations, payer data contains information about insurance networks, coverage details, and demographic attributes of insured populations. It indicates which insurance plans cover specific services and helps identify patterns related to patient access and coverage.



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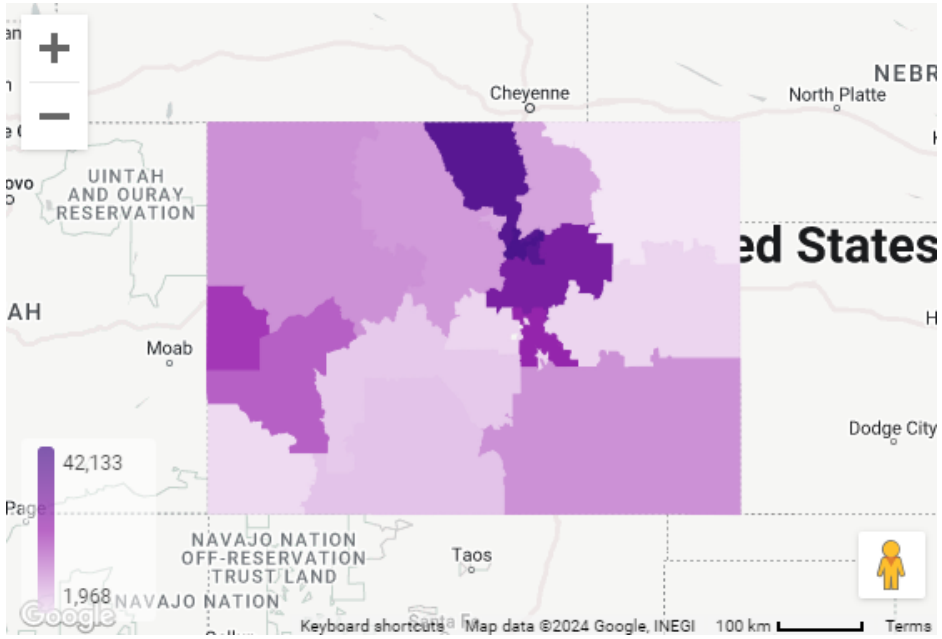
How Can Claims and Payer Data Be Used in D2C Marketing?

- **Assess Markets**
  Identify and Quantify Opportunities:
  Evaluate patient populations and potential market opportunities by analyzing claims and payer data to understand the prevalence of specific conditions and treatment needs by regions.
- **Target Audiences**
  Optimize Budget Allocation:
  Identify the most relevant healthcare organizations that align with your target patient demographics, ensuring your marketing budget is spent on high-potential audiences.
- **Measure Performance**
  Track Campaign Effectiveness and Market Impact:
  Monitor your brand's campaign performance using claims data to measure service adoption rates, assess the growth of market share, and compare outcomes against competing brands.



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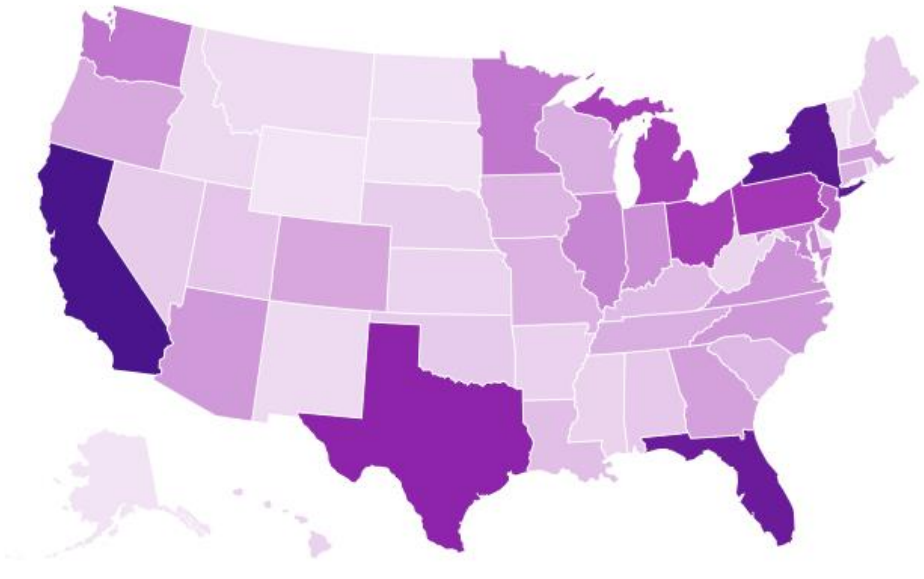
Assess Markets – Utilizing Claims and Payer Data

- **Identify and Quantify Opportunities**
  Claims and payer data provide valuable insights into regional healthcare utilization patterns. By analyzing this data, marketers can assess patient populations and identify market opportunities for specific conditions or treatments.

- **Understand the Prevalence of Conditions**
  Determine the prevalence of medical conditions in geographic areas to better target regions with high demand or unmet needs. This allocates resources more effectively and focuses marketing efforts where they are most likely to drive growth.

- **Evaluate Treatment Needs**
  Gain insights into the types of treatments and services that are being accessed, as well as areas where access may be limited. Marketers can pinpoint regions that may benefit from additional outreach, education, or service expansion.



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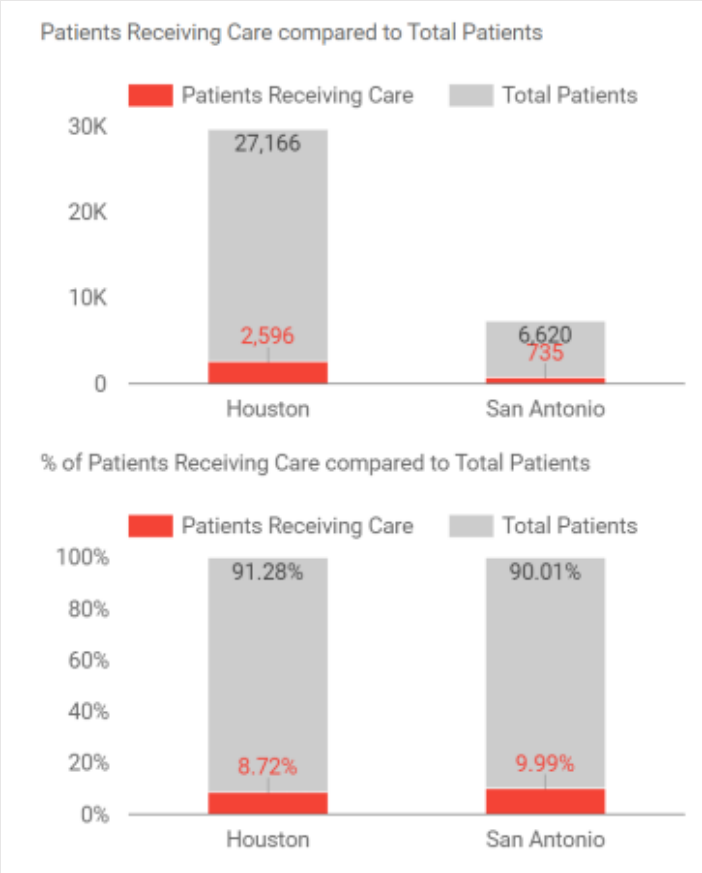
Assess Markets – Utilizing Claims and Payer Data



- **Scenario:** A healthcare organization sought to explore market opportunities for expanding services in Houston.
  - *Observation:* Claims data revealed over 27,000 potential patients needing care, with a large percentage not receiving treatment.
  - *Problem:* Traditional market assessments did not capture the full extent of unmet need, making it challenging to plan for growth.
- **Outcome:** By leveraging claims data to identify underserved regions, the organization was able to strategically focus its expansion efforts.

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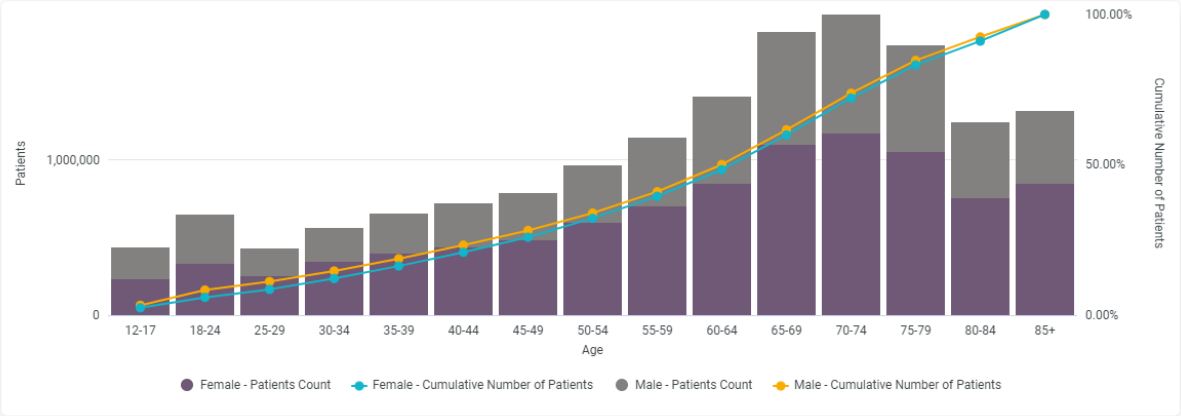
Target Audiences – Utilizing Claims and Payer Data

- **Segment by Condition and Treatment History:** Target patients who have been diagnosed with specific conditions or have a history of certain treatments, ensuring your campaigns resonate with relevant audiences.

- **Leverage Payer Data for Accessibility:** Focus on consumers with insurance coverage that aligns with your offerings, increasing the likelihood of conversion.

- **Activate Custom Consumer Audiences:** Utilize data insights to create tailored DTC campaigns, reaching individuals with a higher probability of needing your services.



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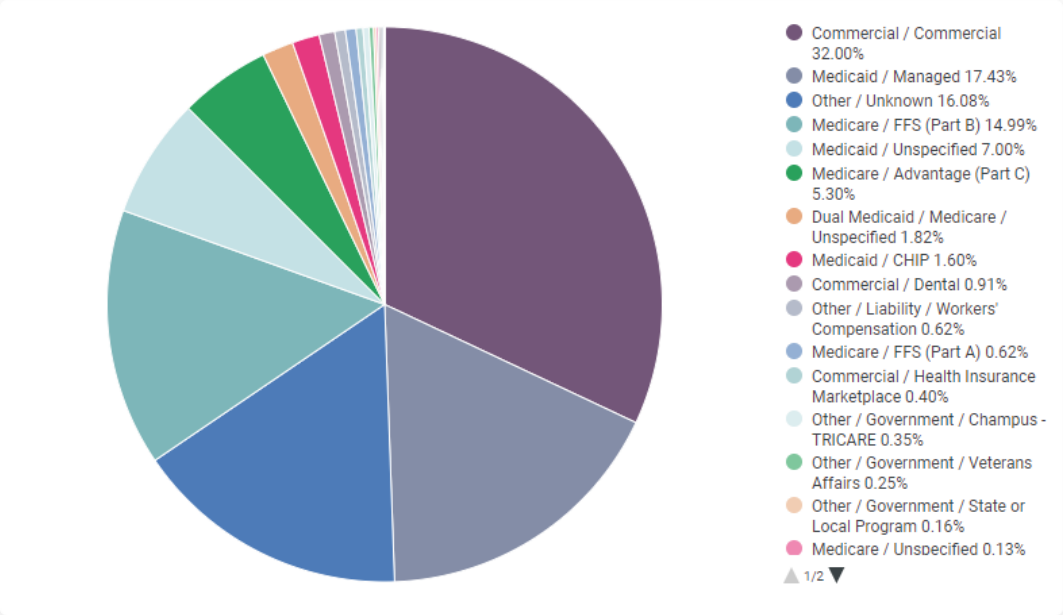
Target Audiences – Utilizing Claims and Payer Data

- **Scenario:** A healthcare organization sought to improve DTC outreach for a specialized treatment.
  - *Observation:* Claims data analysis identified consumer segments that had a higher likelihood of needing the treatment based on past medical history and payer coverage.
  - *Problem:* Initial broad targeting efforts resulted in low engagement and high ad spend without achieving the desired outcomes.
- **Outcome:** By refining audience segments to focus on consumers with specific conditions and appropriate insurance coverage, the organization saw increased engagement and more efficient ad spend.



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Measure Performance – Utilizing Claims and Payer Data

- **Monitor Campaign Impact:**
  Use claims data to track the adoption of treatments and services influenced by your marketing efforts, whether in-person, digital, or omnichannel.

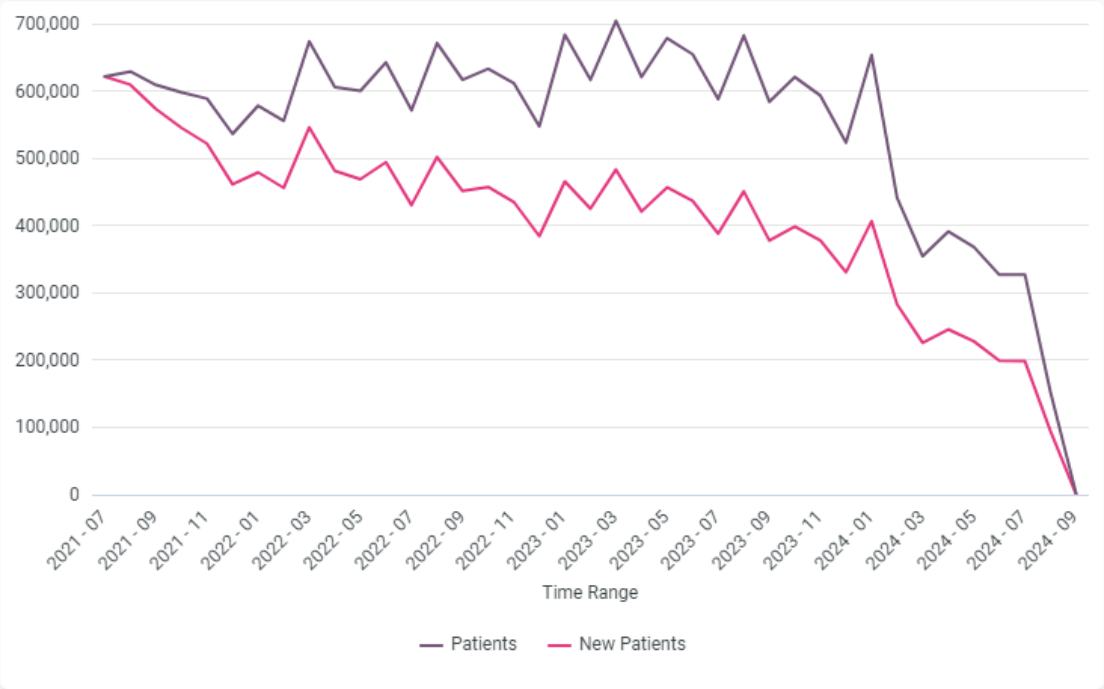
- **Track Competitor Performance and Market Share:**
  Gain insights into how your brand performs against competitors, identifying underserved populations and key geographies for growth.

- **Optimize Strategies Using SDOH Data:**
  Understand how social determinants of health (SDOH) affect the patient journey and refine campaigns for better outcomes.

Time Range	Patients	New Patients
2024 - 09	1,962	1,095
2024 - 08	152,768	94,834
2024 - 07	327,739	198,772
2024 - 06	327,286	199,452
2024 - 05	368,641	228,229
2024 - 04	391,621	245,964
2024 - 03	354,875	226,034
2024 - 02	441,811	283,070
2024 - 01	654,459	406,915

Measure Performance – Utilizing Claims and Payer Data

- **Scenario:** A healthcare organization wanted to assess the impact of a DTC campaign for a new therapy.
  - *Observation:* Claims data provided visibility into therapy adoption rates and shifts in market share post-campaign.
  - *Problem:* Traditional metrics lacked insight into competitor traction and specific patient adoption patterns.
- **Outcome:** The organization used claims data to fine-tune messaging and adjust budget allocation, leading to higher adoption rates and better competitive positioning.



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Developing Provider Referral Strategies to Augment Patient Acquisition

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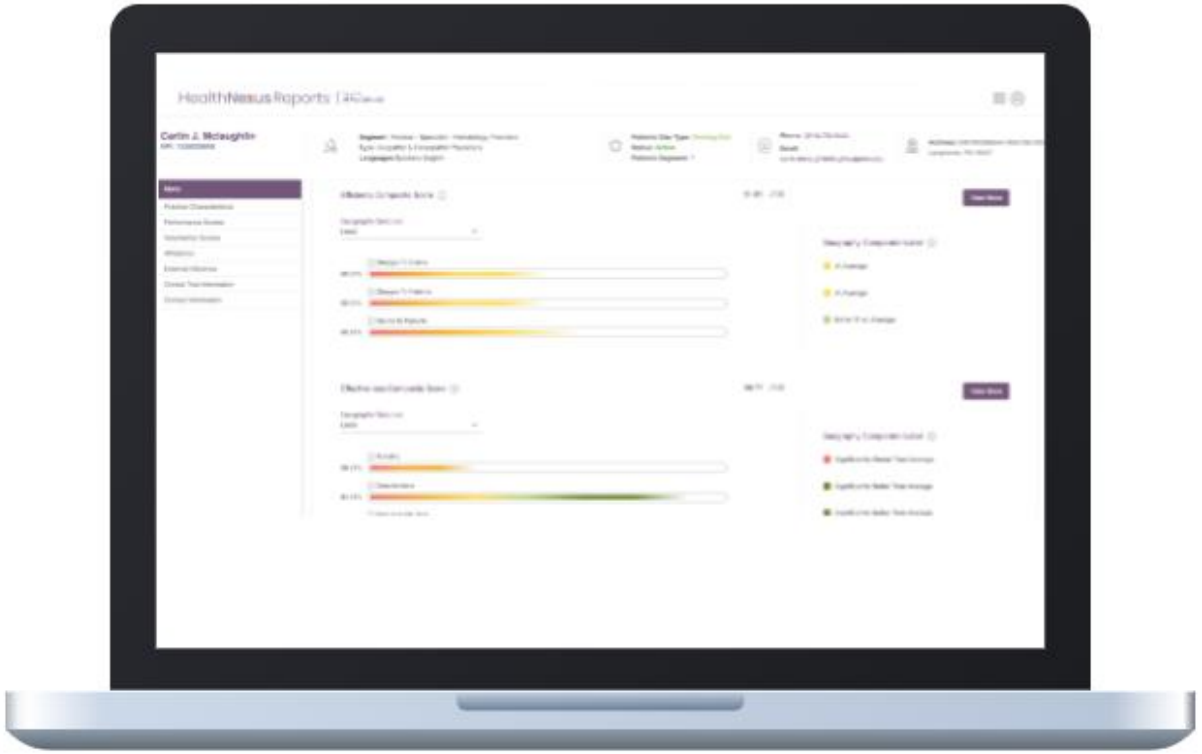
Developing Provider Referral Strategies to Augment Patient Acquisition

- **Identify High-Value Providers:**
  Use claims data to profile healthcare providers (HCPs) and organizations (HCOs), focusing on their patient demographics, referral patterns, and clinical outcomes.

- **Target Strategic Partnerships:**
  Pinpoint providers who are key referral sources or have potential for collaboration based on shared patient profiles or payer mix.

- **Refine Outreach Strategies:**
  Personalize marketing and engagement efforts by understanding provider characteristics and aligning messaging with their priorities.



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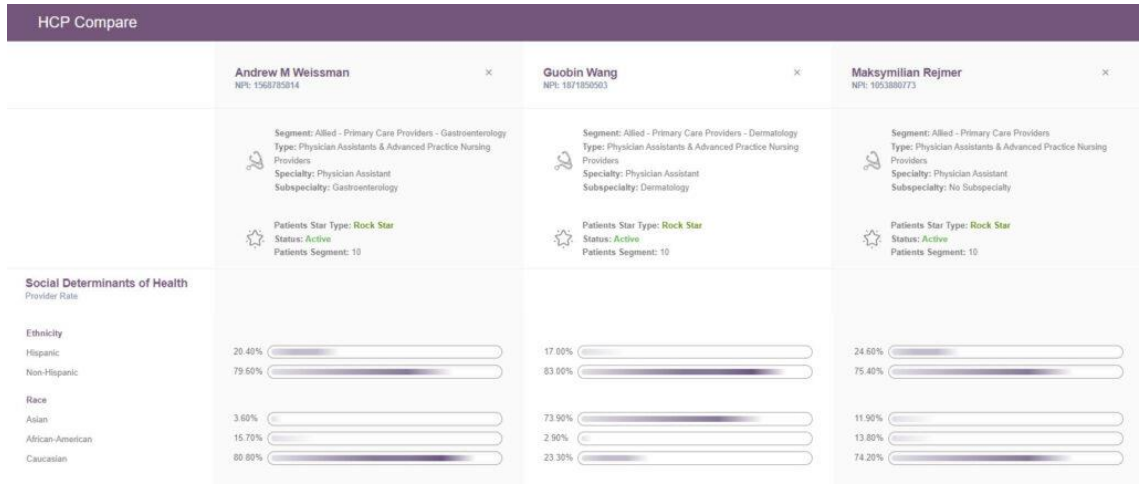
Profiling Targets with Comprehensive Provider Data

- **Scenario:** A healthcare organization sought to improve engagement with providers in a major city.
  - *Observation:* Claims data revealed key differences in payer mix and patient demographics across providers, highlighting those with a stronger alignment to the organization's goals.
  - *Problem:* Without this detailed profiling, previous marketing efforts were not as effective in reaching high-potential providers.
- **Outcome:** By refining the targeting strategy based on provider insights, the organization enhanced engagement with key HCPs and HCOs, leading to stronger partnerships.



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Three Key Take-Aways

- **Maximize the Use of First-Party Data**
  - *Action Step*: Conduct a detailed analysis of lead quality using CRM, call tracking, and contact center data to identify gaps and optimize patient acquisition strategies.
- **Leverage Third-Party Data for Advanced Targeting**
  - *Action Step:* Use claims data to refine audience targeting by diagnosis, payer network, and geographic regions to ensure campaigns reach qualified patients.
- **Develop Provider Referral Strategies**
  - *Action Step:* Identify key referral providers to build awareness and improve patient acquisition.

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Questions?

Please be sure to complete the session evaluation on the mobile app!

AHA Events

Speaker Biography

Alex Kemp

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Alex is an expert in data-driven marketing strategies for healthcare, with a focus on using first-party and third-party data to optimize patient acquisition. With extensive experience in analytics, Alex helps organizations implement advanced targeting techniques and refine their acquisition strategies for better outcomes.

Bibliography/References

- Purple Lab (purplelab.com) – Data Source for Claims and Payer Information