



Beyond the Campaign Launch: Why the Experience IS Your Marketing

Cathryn Connolley, CEO, Doctivity Health

Kris Baird, President, The Baird Group

Steve Koch, Managing Partner, Cast & Hue



Learning Objectives

- Use a comprehensive set of tools to audit your current reality
- Align your brand promise with every customer touchpoint from the digital front door to the final bill
- Engage your entire team to consistently deliver on what you are selling

We All Know What Branding Is.....Right?

It starts with strategy.

Not the graphics....

More than messaging....

It is the experience!

The most successful branding will fail if the patient/customer experience is done poorly.

Your Brand Has to Work for Everyone



Possible Brand KPIs

- **Increase Brand Strength** — Brand Strength Score, ability to attract the best medical talent.
- **Improve Employer Brand** — Quicker to fill, attracting the best, lower turnover.
- **Grow Clinical Brand** — Increased volumes, more Medicare Advantage members, increased pharmacy numbers, more medical group patients.
- **Donor Brand** - Establish a grateful patient program to increase donations.
- **Patient Experience** - Engage the Enterprise In Process, Resulting In Increased Scores, and create brand ambassadors out of staff.

The Ladder of Marketing Achievement

Business
Development

- ▣ Positive Word-of-Mouth
- ▣ Loyalty
- ▣ Utilization

Brand
Development

- ▣ Preference
- ▣ Top-of-Mind Awareness
- ▣ Name Recognition



Questions For Marketers

- What is your process for creating an annual marketing slate?
- Are operations and clinical leadership involved?
- Do your internal customers understand what it means to be “ready” to go to market?

Rules of the Marketing Road



Engage Operations & Clinical Leadership



No marketing dollars unless there is a Positive Patient Experience



How do you define success?

Do Your Current Insights Set You Up for Success?

The What

Survey Responses

Online
Reviews

Brand Awareness
Studies

The Why

Patient Journey
Mapping
(The Patient's
Reality)

Mystery Shopping
(What's Really
Happening)



Journey Mapping

Deeply understand the experience directly from the end-user's (customer, patient, team-member) perspective.

The Power of Journey Mapping Insights

Calling to
make an
appointment

“ “ It's a nightmare calling [Provider's Office]. It's worse than Verizon, and that's pretty bad. I get dropped. They try to send me to the wrong department.

Front Desk &
Check In

“ “ When I walk in there, I wonder: 'Who am I gonna bug this time?' Because they just don't act like they want to help you... at one point I saw one of the ladies, she was on Zillow.

The Billing
Experience

“ “ She just didn't want to help me... She said, 'It's already in collections. You'll just have to pay it.' And she hung up on me. I was just like, this isn't going to work. So I called back and I got somebody else.

... assistance is shaped by nature of comparison, the extent to which the article offers logistical support for the journey, and administrative issues exist, they are being treated as and professionals.

in a genuine care, which is rare and priceless. We are not just taking a job but truly enjoying the way into a new, exciting, new landscape.

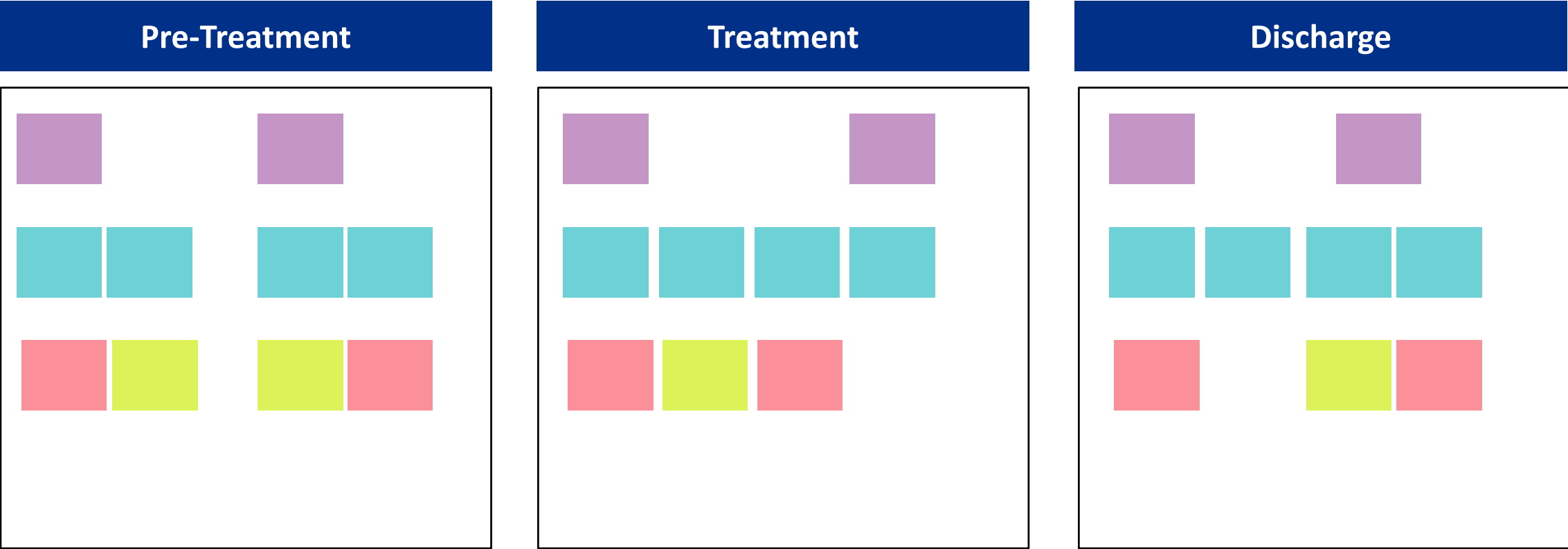
ent, a minute, valued

1988) of managing a busy
significant barrier to care.

Related Cases: [Hepatitis](#)

[illegible]

Journey Map Example



Mapping the Steps

STEPS



Trigger Event

Mapping the Supporting Steps

STEPS



Trigger Event

**SUPPORTING
STEPS**

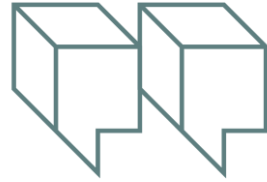


I began to
develop a fever
at work.

I felt a sharp
stomach pain
when dropping
kids off at school

I woke up in the
middle of the
night with chest
pain

I decided to go to
the ER.

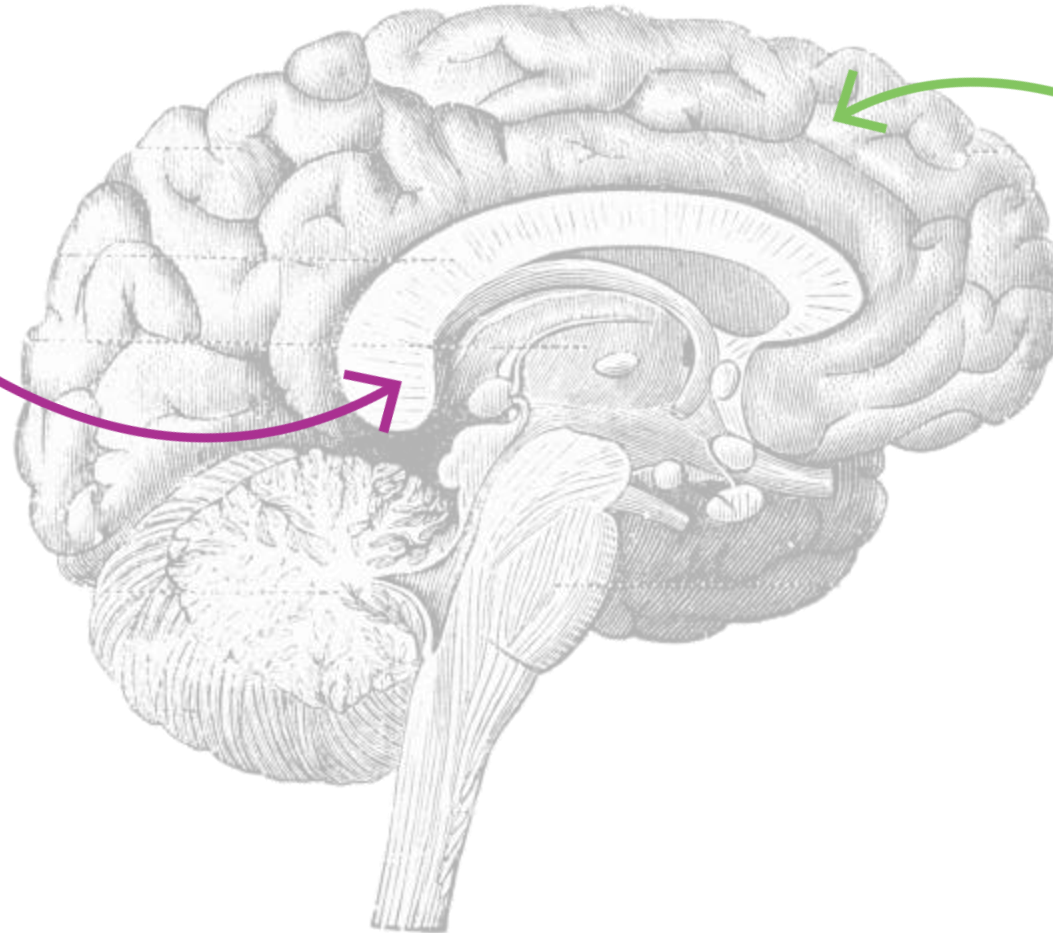


I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.

Maya Angelou

Limbic System

Processes emotions and is responsible for behavior



Neocortex

Controls analytical thought and language

Mapping the Emotions

STEPS



Trigger Event

SUPPORTING
STEPS



I began to
develop a fever
at work.

I felt a sharp
stomach pain
when dropping
kids off at school

I woke up in the
middle of the
night with chest
pain

I decided to go to
the ER.

EMOTIONS



Overwhelm:
I can't get sick, I
have a deadline
this week

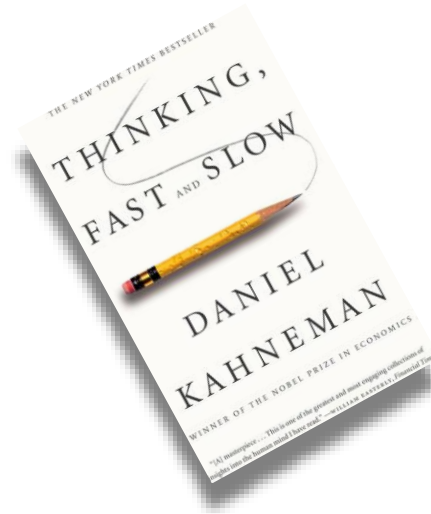
Worry:
Was that from
something I ate?

Fear:
Am I having a
heart attack?

Hope:
They can figure
out what's wrong

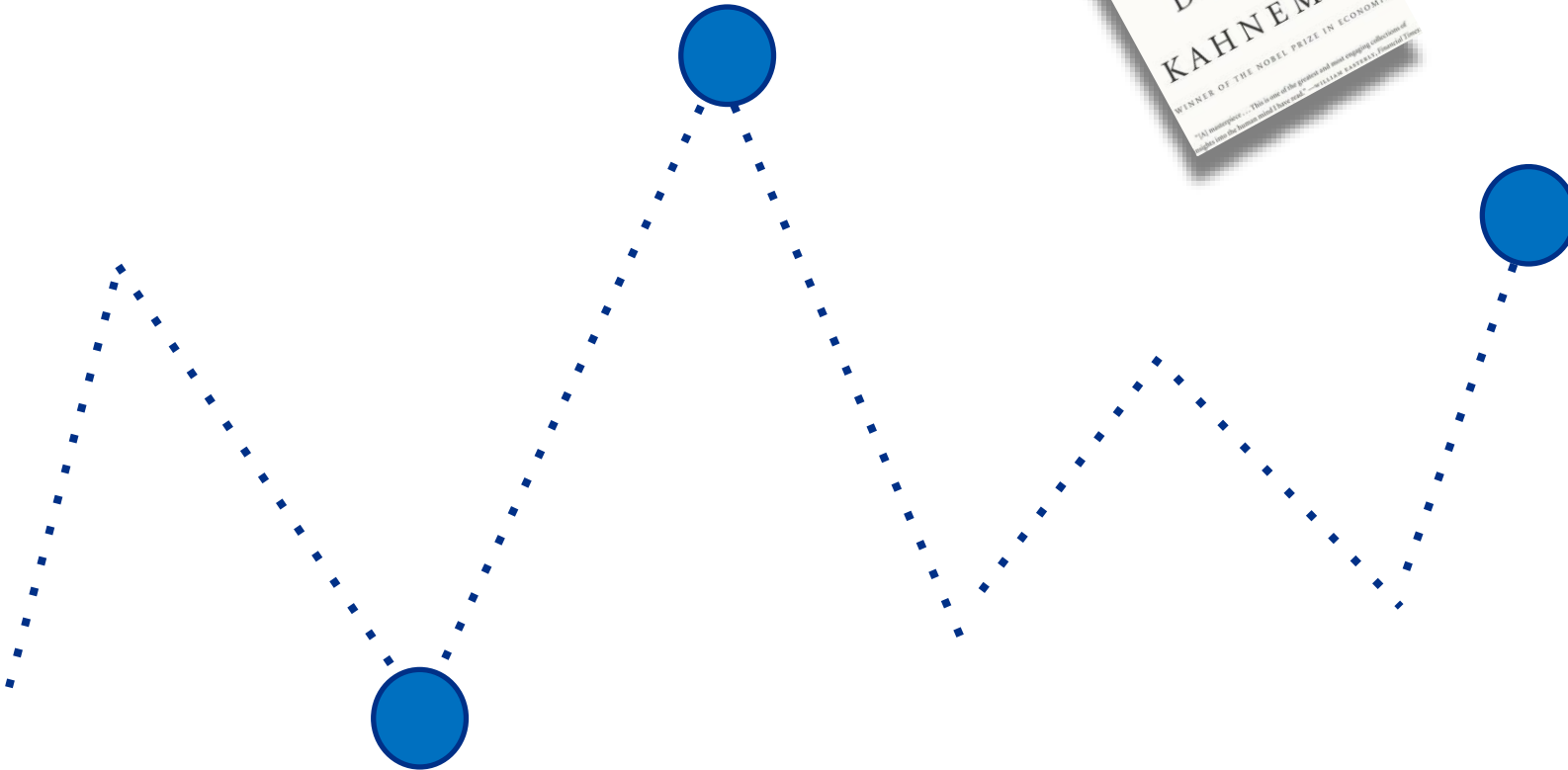


The Peak-End Rule



The Peak-End Rule

People judge experiences largely based on how they felt at the most emotionally intense points (the peaks) and at the end, rather than the overall experience.



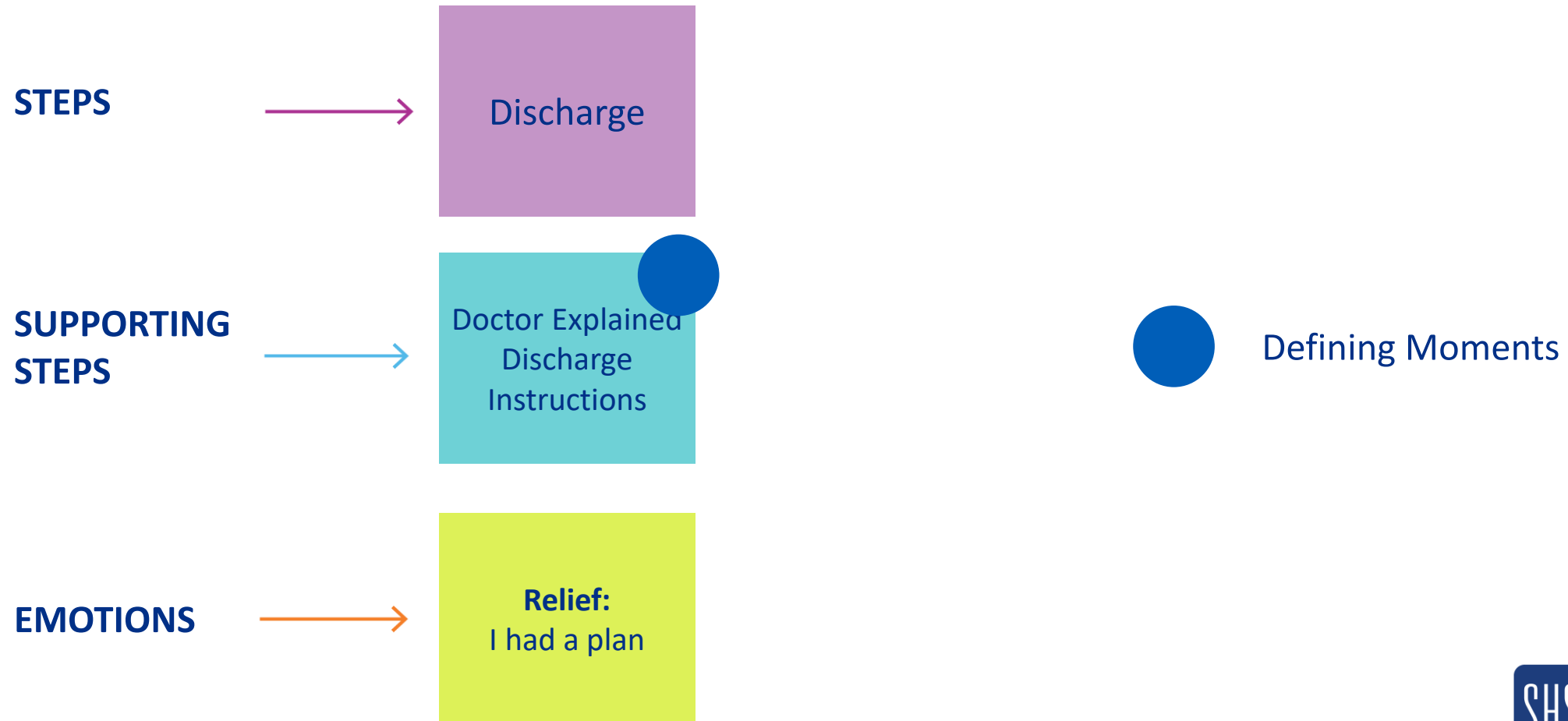
Defining Moments

The most impactful and influential moments of the experience that can make or break the perception of a person's experience.



Supporting Step:
Step/Action

Selecting Defining Moments



WAIT

Like
Screen
waiting

DID paper work
Took 3 min.
wait time on
T.V screen
15 min

waited
1 hr. to be
seen
w/ no apt.

PROVIDER
INTERACTION

only 1
provider
working in
back.

was
there for
3 reasons

provider
interaction
seemed
surprised
me - @ apt
prior care

They took
vitals.
Vitals
taken
fine.

THEY
CHECK
ME IN
REST

S
7
Not long
wait

Cheerful
Content
to watch T.V.
while waiting

Eqn
NOT a long
wait.

Somewhat
disappointed
had to wait
an hour to be
seen.

S 7
Knocked on
door. Smiled.
Said hello
How you feeling

Shins =
Disappointed
Edgy, worried,
not thrilled
displeased ONLY
1 person

Hopeful &
optimistic
they might/could
resolve/handle
my 3 reasons.

puncture
for both
kidneys w/out
WARNING

Hopeful
so far so
good

R

E
8
Quick

didn't
love the
cannal
but oh well.

But
such is life,
could be
worse.

E
Sorry you
feeling bad
6

I
8
checking me
over. trying
to what's wrong

K 7
Knew what
they were
doing (doc)

I
getting 8 soon
quickly
FELL I was
Important

could
only hear
TV. it sit
very close to it

Def. 8
I decided
to wait it out
w/ NO real
idea how long.

Set. 7
I expected to
wait - but
not that long.

K
8
Knew how
long.

which
was located
to only 1 side
of waiting Rm.
- but the layout
is what it is.

Knew
front desk lady
tried to answer
my questions but
I guess couldn't
say how long
I waited

Eqn 6
waited
about 1.0 hour
ish for walk-in

Annoyed!
Displeased.
Surprised

Shocking.

Vitals
- Good
quick jobs
easy no prob.

uncomfort-
-able!!

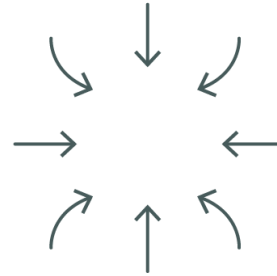
will
address it
next time
I'm there!

Getting Started: Three Simple Rules



Talk to the Right People

You don't need to talk to everyone. Focus on patients who have recently gone through the specific service line or experience your campaign is about.



8 is Enough

Talking to just 8 to 10 people in a specific segment will uncover more than 80% of the most critical themes and pain points.



Just Ask

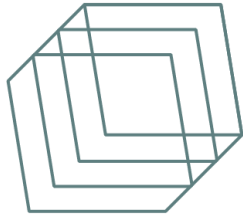
People want to share their stories. Your job is to create a comfortable space for them to do so. Make it easy, be an active listener, and the insights will follow.

Be Curious: The Questions That Unlock Insight

Instead of asking "Were you satisfied?", try asking questions that explore their journey and emotions:

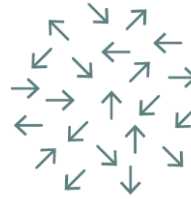
- **To understand the story:** "Can you walk me through what happened next?"
- **To uncover emotion:** "How did that specific moment make you feel?"
- **To measure the brand promise:** "How did that experience line up with what you expected from our brand?"
- **To find the motivation:** "What was the most important thing you were trying to accomplish at that stage?"

What to Look For: Finding the "Moments That Matter"



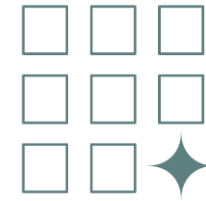
Expectation Gaps

Look for the moments where the reality of the experience **failed to meet the patient's expectations**. These gaps are where your brand promise is breaking and are critical to address before launching a campaign.



Friction Points

Identify any obstacle, frustration, or moment of confusion that **makes the patient's journey harder**. These are the specific problems that will directly undermine your marketing message.



Bright Spots

Listen for the unexpected, positive moments of delight or relief. These are **your hidden strengths and authentic stories** that you can choose to amplify in your campaign messaging.

Mystery Shopping

Trained observers, posing as patients, capture both the **objective facts** and the **subjective feelings** of their experience, providing an unbiased view of the moments where your brand promise is either powerfully delivered or broken.



What You Don't Know,
is Hurting You!

Data, Data Everywhere...
And Not a Drop of Information

Mystery Shopping

Online – chat
Phone calls
Walkthroughs
Patient Visits
Ethnography

The bathroom was filthy! No way I would have surgery here!

She acted like she wanted to get rid of me as fast as she could.

I was clearly chatting with a bot. So much for personal care!

When she took my hand, I knew she really cared.

She scanned me like a loaf of bread.

People

Processes

Place





Now Do Something!



Experience

Brand

Operations

Engaging Brand Ambassadors



Share brand strategy



Align with values and standards



Share patient stories from journey mapping and mystery shopping



Seek staff input on how they are currently delivering on the brand promise. Challenge them to raise the bar.

Key Takeaways

Key Takeaways

Your **brand isn't what you say** it is; it's what your patients actually experience.

Closing the gap between your marketing promise and operational reality **empowers your staff to become true brand ambassadors** who can confidently deliver on your message.

Use **mystery shopping and journey mapping** to uncover the emotional reality of the journey; the findings and direct quotes are your most powerful tools for driving internal change.

The ultimate goal is to **align the experience with the brand promise**, turning satisfied patients into your most effective marketing channel.



Questions?

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

Your Speakers

- Cathryn Connolley
- CEO, Doctivity Health, cathryn@doctivityhealth.com

Cathryn Connolley, MHSA, is the Founder and CEO of Doctivity Health and an expert in healthcare business advancement and revenue growth strategy. She launched Doctivity™, a pioneering BI and PRM SaaS platform that leverages conversational AI. This powerful tool has successfully driven over \$100M in new revenue for its customers by providing actionable analytics that improve provider performance and accelerate growth.

Prior to Doctivity, Cathryn was Vice President of Marketing Strategy and Operations at Geisinger, where her programs saved the organization more than \$45M. She enjoys traveling, golfing, and hiking with her family and Golden Retriever, Rory.



Your Speakers

- Kristin Baird
- President/CEO, Baird Group, kris@baird-group.com

Kristin (Kris) Baird, RN, is a former marketing executive and founder of Baird Group, where she has become healthcare's premier culture catalyst. Since 1994, she has helped hundreds of organizations authentically deliver on their brand promise by transforming culture and improving the patient experience.

Using proprietary mystery shopping and culture assessment methodologies, Kris provides leaders with data-driven insights to close critical experience gaps. Her work strategically aligns staff behaviors with the organization's brand, building patient loyalty, reducing staff turnover, and strengthening financial performance by ensuring the experience matches the marketing.



Your Speakers

- Steve Koch
- Managing Partner, Cast & Hue, steve@castandhue.com

Steve Koch applies his marketing background to human-centered design at Cast & Hue, shaping impactful customer and patient experiences, strategies, and innovations. He and Cast & Hue champion human-centered design, co-creating solutions with clients. Their work uses frameworks like Jobs-to-be-Done, Journey Mapping, Design Thinking, and Systems Thinking. This practice integrates design and behavioral science — exploring decision-making nuances. Through strategic empathy, they uncover the functional, emotional, and social needs driving behavior. This delivers tangible results for clients like OhioHealth, P.F. Chang's, Aetna, Henkel, Baystate Health, MedStar Health, Arkansas Children's, and the United Way.

