

SHSMD26 CONNECTIONS

Health Care Marketing, Strategy & Communications

American Hospital Association Conference
September 27-29 ⚓ Baltimore

(Executive Session) Market Strategy Earns Its Budget: Teaming With Physicians to Accelerate Results

- David Grandy, SHSMD Past President, Product Development Leader
- Sierra Kelly Martinez, Director, Customer Engagement Center, Renown Health
- Dr. Priti Lakhani, Founder, Clinary, Inc. & Past CMIO
- Moderator: Linda MacCracken, Ignite Market Advantage, LLC



Agenda

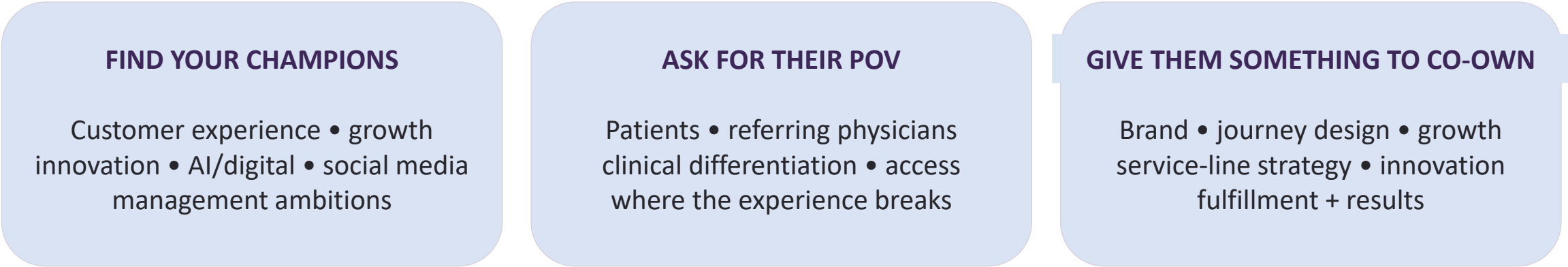
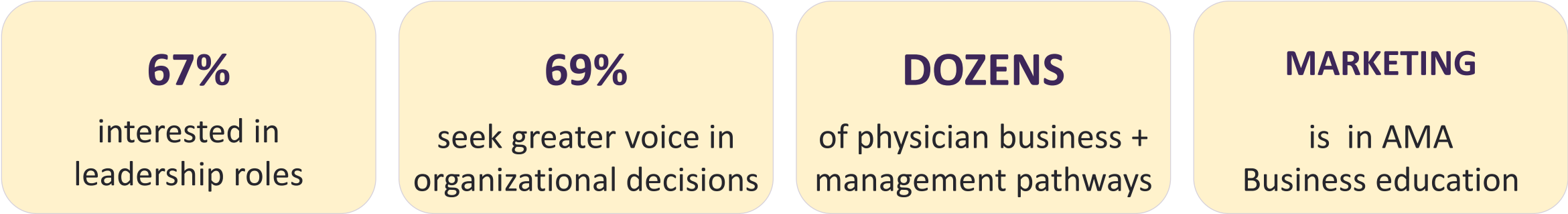
Physicians can be powerful partners in accelerating Marketing performance. They bring clinical and capacity insights to priorities, access, experience, service lines, brand, and the customer journey.

Objectives:

- **Engage physicians where they can make a difference:** Identify practical ways to involve physicians in campaigns, experience, digital, and AI to improve results.
- **Connect marketing demand to care delivery:** Use the customer journey to align Marketing, Access Physicians, and fulfillment teams.
- **Create joint ownership for results:** Use an operating model where physicians, Marketing, Access & Service leaders shape the solution and measure results together.

Your Next Marketing Champion Is a Physician

Many physicians want a bigger voice, and a growing leadership pipeline is teaching them the business of health care.



Physicians bring clinical credibility + customer insight. Marketing & Access turn it into growth.

Sources: Jackson Physician Search/MGMA physician leadership survey; AMA Business of Medicine education. “Dozens” reflects the broad U.S. landscape of MD/MBA, health management, physician-executive and leadership pathways.

Solving for the tyranny of poor operating and engagement model design

AS PHYSICIAN LEADERS SEE IT

“ They tell us what they are planning. We give input. They go execute. Then they circle back and ask what we think.”

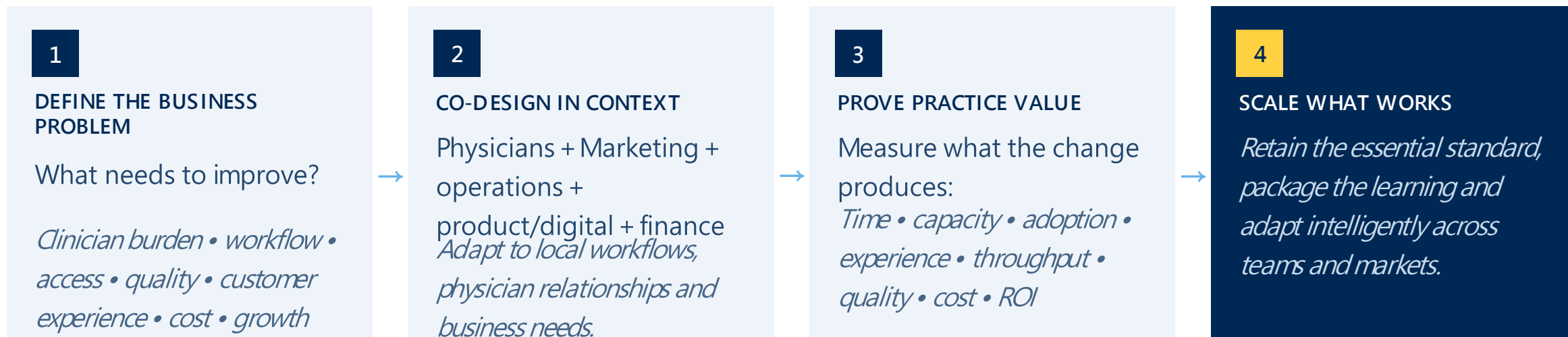
AS MARKETING SEES IT

“ Our greatest value is as a strategic advisor. Instead, we’ re order takers.”

Same constraint, opposite directions, identical cause.

Solve the Business Problem, Prove Practice Value, Then Scale

Adapt solutions to the local context, combine technology + services and scale measurable value.



“Get smart about what actually works, what the business problems are to solve in a particular context” , then adapt to the local business context.

PUBLIC CASE · ViVE 2025 · GEISINGER AMBIENT AI

35 MIN

saved per provider workday

70%

decrease in PCP “pajama time”

55%

decrease in self-reported burnout



Co-Design Comes Alive Through the Operating Model

Structure matters, but norms and ways of working create real co-ownership.

“ Org design is a key component — and the underlying operating model, organizational norms and ‘ ways of working’ are what bring the op model to life.”

MULTIDISCIPLINARY TEAMS

Organize around the end-to-end journey and shared outcome — not functional silos. Bring the disciplines needed to solve the whole

EMPOWER THE TEAM

Leadership sets purpose and outcomes; the cross-functional team has the authority to determine how goals will be met.

BREAK DOWN SILOS

Replace disconnected “ cylinders of excellence” with integrated work across physicians,
Marketing/operations,

ITERATE TO VALUE

Use shared data, early feedback, and rapid iteration. Make learning and follow-through the operating rhythm v. single

Shared outcome → shared design → shared decisions → shared accountability

Three components. One of them is not a meeting.

01

Shared outcome, measured end to end

One number, carried jointly by marketing and a named physician leader, running the full chain: qualified demand, appointment booked, visit seen, clinical and economic result.

Align early on both economic value and clinical value

02

Decision rights, named out loud

Marketing decides audience and engagement. Clinical decides appropriateness. Operations decides what is deliverable. Access decides routing.

Jointly: the offering, the critical assumption and the service model.

03

A launch gate, not a routine

A condition the work cannot pass. Before a campaign goes to market, a named person confirms in writing that the capacity exists to absorb what it will produce.

A committee meets. A gate decides.

Physicians are not stakeholders around the process. They are inside the entire system.

The product is need, search, choice, access, scheduling, preparation, care, follow-up.

FUND OUTCOMES, NOT
INITIATIVES

Stop measuring departments. Measure the entire value chain.

WHAT WE MEASURE NOW

Marketing impressions	Digital clicks	Access speed to answer	Operations productivity	Physicians clinical volume
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Five scoreboards. Everyone green in the quarter a patient searched, gave up and went somewhere else.

SHARED OUTCOMES, MEASURED END TO END



Co-design is adopted when it delivers something the clinical side already needs. Nobody co-designs what they can't change.

Physicians Help Shape the Marketing Promise, Before It Goes to Market

Brand, growth and customer experience are stronger when physicians help define what Renown can credibly promise and deliver.

Don't ask physicians to approve the marketing. Ask them to help make it better.

BRAND CO-DESIGN

Physicians gave advance input on revision & options • Physicians were in brand selection • Physicians saw their final brand input.

GROWTH + SERVICE LINES

Bring physician expertise to service-line opportunities, clinical differentiation and customer value prop — connects opportunity with clinical delivery.

CUSTOMER EXPERIENCE

Physicians are in future-state experience design, translate brand promise to provider matching, specialty requirements, access, scheduling and continuity.

MARKETING PAYOFF: More credible differentiation • stronger physician advocacy • the promise the organization can fulfill



Marketing Doesn't Stop at Demand. It Helps Make Demand Convertible

Marketing, physicians and the Health Engagement Center align the promise, capacity and customer path so response can become care.

MARKETING

Create + capture demand

Brand • campaigns • digital
• service-line growth •
physician outreach

PHYSICIANS

Make access executable

Capacity • provider
matching • access
standards • scheduling •
referral / triage

HEALTH ENGAGEMENT CENTER

Convert demand

Navigation • scheduling •
follow-up • centralized
workflows

GROWTH

Fulfill + learn

Response → scheduled →
seen → treated •
experience • volume

REPORTED HEALTH ENGAGEMENT CENTER RESULTS

35%

YOY growth in
new-patient appointments

91%

patient rating for
scheduling ease

Find a Doctor

Need Urgent Care?

View current walk-in wait times or Book Ahead at select Urgent Care locations.
Wait times are approximate and not guaranteed.

Book Appointment

Search...

Has Open
Scheduling

☐ Yes (32)

Specialty

☐ Endocrinology,
Diabetes and
Metabolism
☐ Epilepsy
☐ Family & Adult
Psychology
☒ Family Medicine
☐ Family Medicine -

Sort By
Doctor Last Name A to Z

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12 Items

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Page 1 of 9



Cheruba Abraham, MD

Family Medicine

(775) 982-5000

Renown Medical Group - Fernley

A MEMBER OF **Renown**
MEDICAL GROUP

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WHEN FULFILLMENT IS PART OF MARKETING PERFORMANCE

OPERATING SHIFT: **Aligned Marketing + Engagement Center calendars • capacity considered before campaigns • physicians involved in redesign and access standards • digital, IT, operations and customer service working against the same journey.**

Clinical Research: Connecting Marketing Demand to Clinical Fulfillment

Marketing + Engagement + physicians create a clearer journey into a growing, high-value clinical capability

1 HOW IT WAS

Physician Referred Clinical Trial– Open Loop / Hard to Access

- Patient intake was not standardized
- No consistent provider call to action
- Patients/providers often needed to already know the program and whom to contact
- Clinical research existed, but the customer journey was fragmented

2 HOW THE JOURNEY WAS IMPROVED

MARKETING **Makes the opportunity visible**
Research hub • searchable studies
• specialty pathways • patient education

ENGAGEMENT / ACCESS **Creates a clear front door**
Contact • navigation • research pathway • connection to right team

PHYSICIANS **Create clinical relevance**
Identify appropriate patients • discuss trial options • connect patients

RESEARCH TEAM **Fulfills the opportunity**
Eligibility • screening • enrollment • participation

3 GREATER IMPACT

140+
active clinical trials
vs. 35 in 2021

53,085
Patients emailed
In 2026 personalized outreach campaign

+407
research participants
enrolled in single campaign vs 350 in 2025

Visible demand → journey navigation → physician connection → clinical fulfillment → higher value

Physicians See What Marketing Can't See Alone

Bring physicians the market insight. Ask them to diagnose what it means for the patient and the clinical workflow.

WHERE

Where will the patient get confused, hesitate or lose trust?

WHAT

What assumption doesn't fit how care is actually delivered?

WHEN

Where will scheduling, referral, triage or capacity defeat the promise?

WHY

What will make physicians resist — or champion — the change?

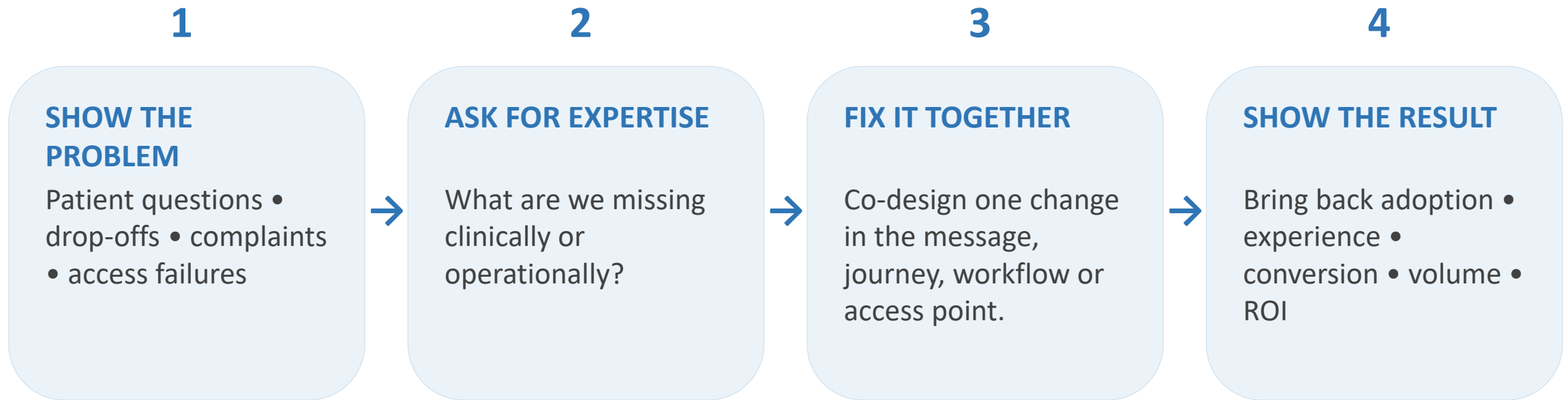
The best question isn't "Do you like this?" It's "What are we missing?"

SHSMD

Society for Health Care
Strategy & Market
Development™

Bring Physicians a Problem Worth Solving

A specific patient or business problem gets a better response than a general request to “partner with Marketing.”



SPECIFIC PROBLEM → PHYSICIAN INSIGHT → CO-DESIGN → MEASURABLE RESULT

What Makes a Physician Champion Stay Engaged

Physicians become advocates when their expertise visibly changes the work.

1 ASK EARLY

Bring insight and a question, not a finished campaign for approval.

2 MAKE THE ASK SMALL + SPECIFIC

“Review these three patient drop-off points” beats “Join our Marketing initiative.”

3 SHOW THEIR FOOTPRINTS

Tell them exactly what changed because of their input.

4 CLOSE THE LOOP

Bring back results quickly — and invite them into the next decision.

STRONGER, BETTER, FASTER

Stronger physician advocacy +

Better clinical fit+

Faster adoption

= Better customer experience

Three Key Takeaways

- 1. Put physicians inside the operating model, not at the approval stage.**
Agree on the outcomes that Physicians, Marketing, Access, and Operations will own together.
- 2. Connect demand to clinical fulfillment.**
Before a campaign launches, align on capacity, physician practice volume goals, access, scheduling, and the customer journey activities.
- 3. Start with a real problem and prove the value together.**
Show customer and market insights, co-design the solution, then bring back experience, conversion, volume, and ROI results.

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Questions?

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



David Grandy

**Product Leader &
SHSMD Advisory Board
Member**

- David Grandy, FACHE, is a healthcare innovation executive with Risant Health and the Immediate Past President of the Society for Health Care Strategy & Market Development (SHSMD). Previously, as National Vice President of Innovation at Kaiser Permanente, David led work to redesign care delivery, including ambulatory care models, next-generation medical office concepts, and other initiatives focused on transforming how healthcare is delivered.
- David's career spans more than 20 years across healthcare operations, clinical ethics, management consulting, design and innovation. His work focuses on human-centered design, operating models, and bringing clinicians and other stakeholders into redesigning healthcare delivery. His teams have received Fast Company recognition for design and innovation, and David was named an HCD 10 healthcare design leader. He served as President of the SHSMD Advisory Board in 2025 and continues to serve on the Board.



Sierra Martinez- Kelly

Director of Renown
Health's Customer
Engagement Center



- Sierra Kelly-Martinez is Director of Renown Health's Customer Engagement Center, where she leads efforts to create exceptional customer experiences and improve access, preference, loyalty and growth. She is a nationally recognized leader in customer-centered transformation, bringing together digital, operational and engagement strategies to make it easier for consumers to connect with and navigate healthcare.
- Sierra also oversees Renown's community benefit efforts, helping strengthen connections with more than one million people across a 100,000-square-mile region. She earned her Master of Public Health and Bachelor's degree in Neuroscience from the University of Nevada, Reno, where she previously served as an adjunct professor in the School of Public Health.





Dr. Priti Lakhani

**Founder, Clinary, Inc &
Former CMIO**



- Priti Lakhani, DPM, MHCM, is the founder of Clinary, Inc., a healthcare technology company focused on patient safety and workflow intelligence for health systems. A board-certified surgical podiatrist who practiced for 15 years, Priti has built her career around patient experience, quality improvement, safety, and healthcare transformation.
- Priti has held physician and healthcare leadership roles across MITRE, Cerner, the U.S. Department of Veterans Affairs, and other healthcare organizations, bringing clinicians into the design and implementation of new models of care and technology. She earned her Master of Health Care Management from the Harvard T.H. Chan School of Public Health, where she is a Practicum Leader. She has taught and mentored healthcare leaders in clinical informatics and change management.



Linda MacCracken

**Ignite Market
Advantage, LLC &
Harvard School of
Public Health**



- Linda MacCracken is Principal and Founder of Ignite Market Advantage. She advises health systems and healthcare companies on customer-centered growth, marketing strategy, innovation, and experience. Previously, Linda was an Associate Director in Accenture's Health Innovation practice and Vice President, Product Management and Advisory Services at Truven/Thomson Reuters Health (now IBM).
- Linda holds a faculty appointment at the Harvard T.H. Chan School of Public Health, where she teaches healthcare marketing to physician executives in the Master's in Health Care Management program. She has led teams to improve digital access, customer acquisition and retention, and growth in healthcare technology. In 2020, Linda received SHSMD's Leadership Excellence Award.



References | Where and How to Engage Physicians

A practical menu for marketers: engage physicians where their expertise can change the decision, the experience or the result.

WHERE	HOW TO ENGAGE	ASK PHYSICIANS TO HELP WITH	MARKETING PAYOFF
STRATEGY + GROWTH	Advisory council • physician interviews • service-line planning • growth target reviews	Priorities • clinical opportunity • differentiation	Smarter growth bets
MARKET INSIGHT	React to research • test personas/segments • identify unmet needs • present insights to peers	Meaning of findings • unmet needs • clinical implications	Better targeting
BRAND + CAMPAIGNS	Creative briefs • brand input/voting • message testing • clinical stories • PR/content	Clinical value • proof points • patient triggers	Stronger response
ACCESS + CAPACITY	Access committee • specialty standards • capacity review • referral/triage design	Capacity • access rules • referral logic	Higher conversion
CUSTOMER JOURNEY + DIGITAL	Journey workshops • digital-front-door design • self-scheduling rules • AI/search standards	Clinical routing • scheduling • workflow	Less leakage
MD OUTREACH + REFERRALS	Referral strategy • peer outreach • department presentations • physician ambassadors	Referral barriers • peer credibility • advocacy	Referral growth
REPUTATION + EXPERIENCE	Review feedback • ratings/review standards • identify addressable experience issues	Drivers of praise/dissatisfaction • response standards	Trust + loyalty
INNOVATION + AI	Define use cases • test workflow fit • shape physician value proposition • champion launch	Clinical value • safety • workflow • peer adoption	Faster adoption
MEASUREMENT + ROI	Review response → scheduled → seen → treated • interpret barriers	Outcomes • barriers • what to scale/fix	Clearer ROI

Best rule: ask for expertise before approval — and bring physicians back the results so involvement becomes co-ownership.

References | What the Research Says About Clinical Engagement

The evidence is strongest for implementation, adoption, co-design and consumer choice — all variables that affect Marketing performance.

CHAMPIONS → ADOPTION

2024 systematic mixed-studies review of 23 studies: clinical/healthcare champions promoted technology adoption. Clear mandate, expertise, time and organizational support mattered.

Pettersen, Eide & Berg. BMC Health Services Research, 2024.

CHAMPIONS → ORGANIZATIONAL UPTAKE

2022 systematic review of 35 studies: in the subset examining organizational uptake, 5 of 7 studies associated champions with increased use of best practices, programs or technology. Causal evidence remains limited.

Santos et al. Implementation Science Communications, 2022.

CO-DESIGN → CLINICALLY RELEVANT TOOLS

2024 umbrella review of 21 reviews found healthcare professionals commonly participate in digital-health co-design; authors emphasize meaningful clinician involvement to create clinically relevant, sustainable interventions.

Kilfoy et al. Digital Medicine, 2024.

PHYSICIAN RESPONSE → CONSUMER CHOICE

2024 experiment found negative physician reviews reduced selection intention; physician response had a significant positive effect and reduced the influence of negative reviews.

Han et al. Journal of Medical Internet Research, 2024.

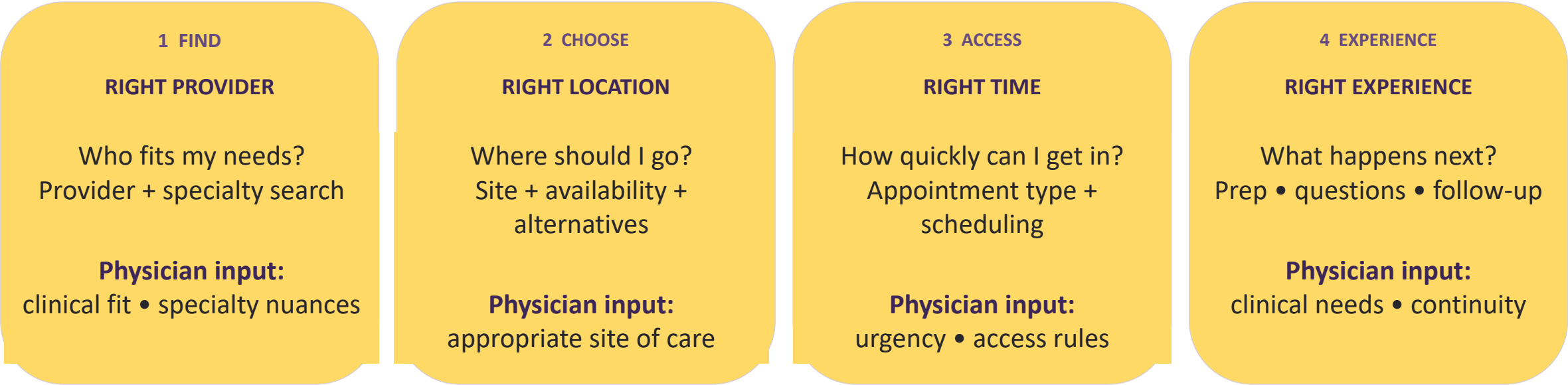
Marketing implication: physician involvement can improve the conditions that make Marketing work credibility, clinical fit, implementation, adoption and customer choice.

Note: the literature does not establish that physician engagement directly causes higher Marketing ROI; it supports important upstream drivers of Marketing performance.

References: Renown Designs the Journey Around the Customer

A customer question becomes a cross-functional design brief, with physician expertise embedded in the moments that require clinical judgment.

Customer Need: “Can you help me find the right care, without making me figure out your system?”



Marketing sees the journey • Physicians define the clinical rules • Engagement makes it easy to complete

Source: Sierra/Renown Digital Patient Engagement Transformation — Della journey: Right Provider • Right Location • Right Time • Right Experience; incorporates provider perspective and specialty nuances.