

SHSMD26 CONNECTIONS

Health Care Marketing, Strategy & Communications

American Hospital Association Conference
September 27-29 ⚓ Baltimore

From Zero to ROI in 12 Months: Launching a Physician & Consumer CRM That Delivers

- *Claire Turmelle, OU Health*
- *Caroline Rykard, OU Health*

Today's Roadmap

- About OU Health
- Why this conversation Matters Now
- The Ask: Buyback Timeline
- Creating Organizational Readiness
- A Framework that You Can Apply
- Lessons Learned
- Questions

Speaker Overview



Claire Turmelle

*Director of Marketing &
Consumer Strategy, OU Health*



Caroline Rykard

*Manager of Market Intelligence &
Consumer Insights, OU Health*

About OU Health



CLINICAL CARE



RESEARCH



EDUCATION

ADULT CARE



OU Health
The UNIVERSITY of OKLAHOMA

CHILDREN'S CARE



Oklahoma Children's
OU Health • The UNIVERSITY of OKLAHOMA

CANCER CARE



OU Health | Stephenson
Cancer Center
The UNIVERSITY of OKLAHOMA

Oklahoma's Only
Comprehensive
Academic Health
System



Service to all
77 Oklahoma
counties



1,300+

Physicians & APPs



700+

Residents & Fellows



13,000+

Employees



944

Licensed Beds



35

Outpatient Locations



113

Specialties &
Subspecialties

SHSMD

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Why This Conversation Matters Now

CRM investments come with **high expectations**

Organizations are investing in CRM to accelerate growth, improve engagement and strengthen relationships.

Marketing is expected to drive **measurable growth**, not just awareness

Leaders want marketing to influence patient volume, physician referrals, access and revenue—not just metrics.

Teams need better ways to connect **strategy, access, physician engagement and consumer demand**

Success requires alignment across teams and data to act on the right opportunities at the right time.



CRM is an operating model conversation, **not just a platform conversation.**



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What You'll Be Able to Apply

Practical takeaways you can use to launch, scale and measure CRM for growth.



1

Build alignment before buildout

Conduct a marketing readiness assessment and align marketing, operations, clinical and executive stakeholders from the beginning.



2

Use data to prioritize CRM opportunities

Apply market, referral, volume and access data to identify high-impact growth and shape workflows.



3

Measure CRM like a growth engine

Define ROI expectations, attribution logic and performance indicators that connect CRM activity to business impact.

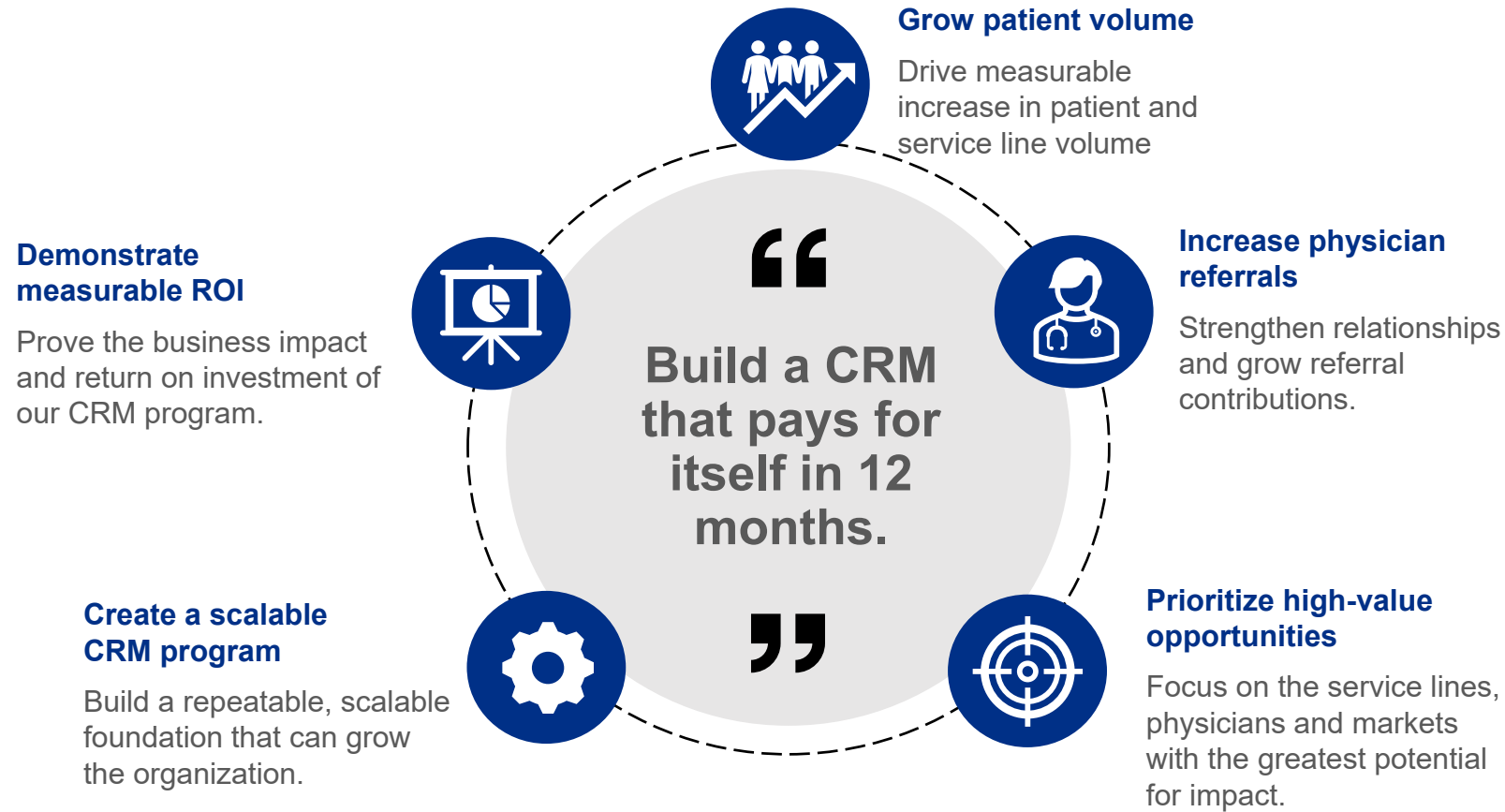
The Ask

“

**Build a CRM
that pays for
itself in 12
months.**

”

The Ask



This was not about implementing technology.
It was about building a capability that drives growth and delivers results.



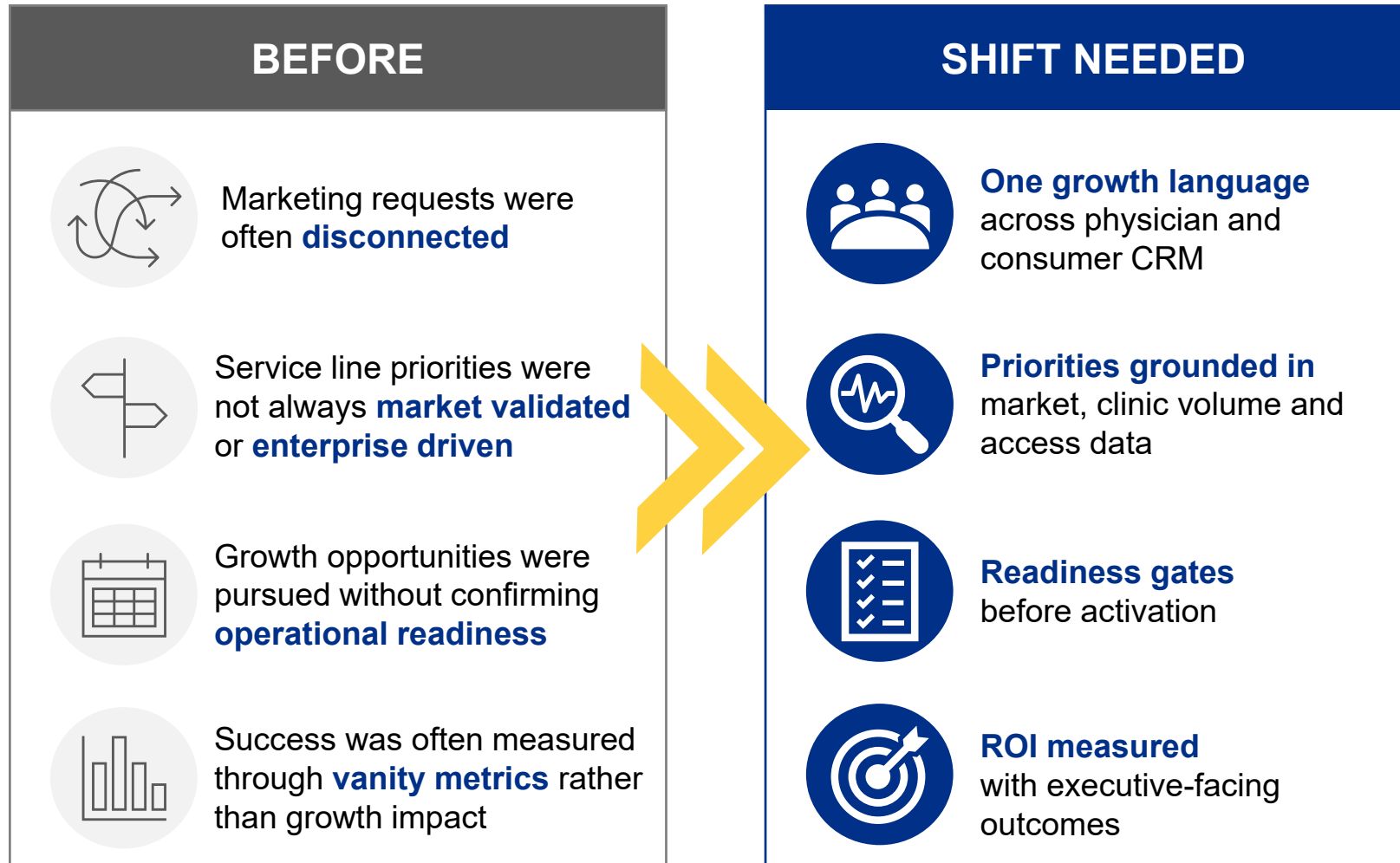
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Creating Organizational Readiness

Building Alignment Before the Buildout

From Disconnected Efforts to Growth Impact

A strategic shift in how we engage, prioritize and measure.



Who Needs To Be At The Table

Cross-functional partners. Shared ownership. One growth outcome.

Partner	Why They Matter	What They Help Decide
 Executive Sponsor	Sets enterprise priority and removes barriers	 Investment, prioritization, accountability
 Marketing Strategy	Owens positioning, campaign strategy, channel plan	 Message, audience, activation plan
 Market Intelligence	Sizes opportunity and defines audience logic	 Market demand, leakage, segmentation
 Physician Outreach	Connects referral strategy and provider relationships	 Referral targets, provider engagement
 Operations/Access	Confirms capacity and patient routing	 Scheduling, availability, clinic readiness
 Clinical Leaders	Validates campaigns and clinical audience codes	 Clinical fit, patient criteria
 Billing/Finance	Identify financial baselines for ROI purposes	 Average contribution margin
 CRM Team	Builds audiences and journeys in CRM	 Reporting, technical building



When the right partners are at the table from the start, **CRM becomes a catalyst for aligned decisions and measurable growth.**

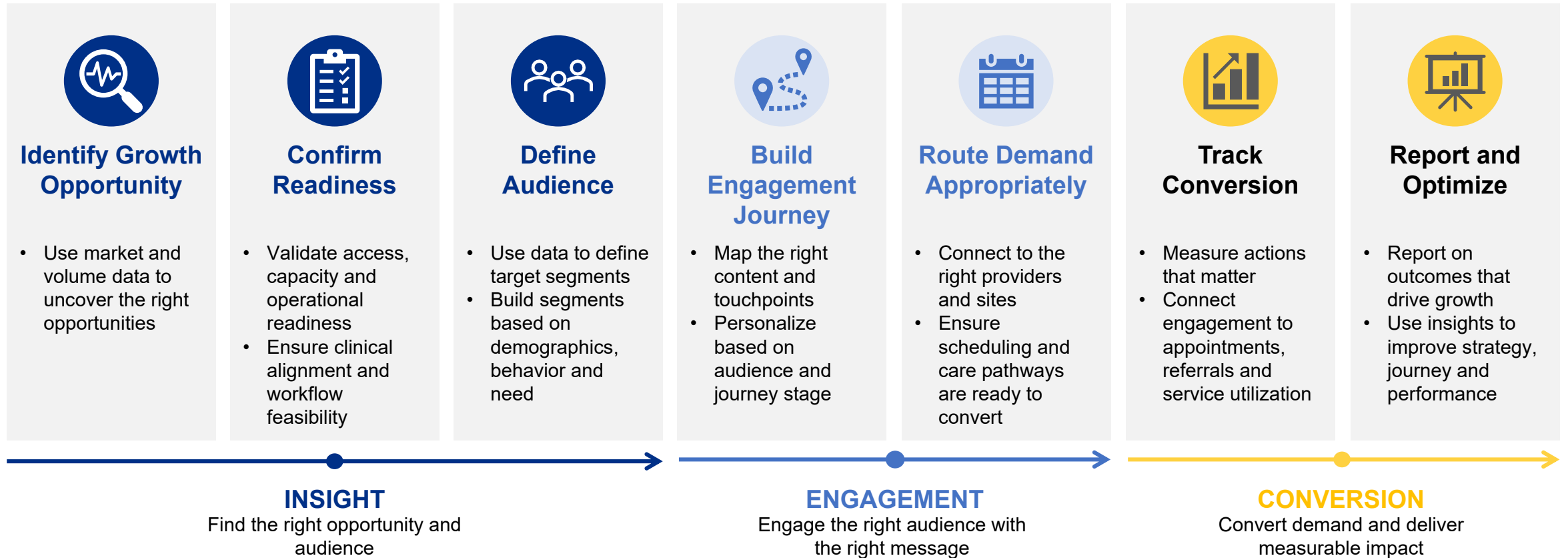
Why Leadership Alignment Made the Difference

Creating the governance, accountability, and strategic focus needed for enterprise CRM success.



Building the Workflow Around Reality

A CRM workflow is only as good as the operational path behind it.



This is where partnership matters most. Marketing can create demand, but operations and clinical teams determine whether that demand becomes a good experience.

Putting the Pieces Together

A Framework You Can Apply

Start With Campaigns That Have a Clear Path to Action

A crawl-walk-run approach to building CRM confidence, capability and with impact.



Demonstrate value through quick wins, then expand into strategic growth initiatives where audience identification and patient journeys are more complex.

Choose Growth the Organization Can Actually Fill

The Marketing Readiness Scorecard is the go/no-go gate for volume-driving CRM campaigns.

Is this service line ready for volume-driving marketing?

The scorecard brings operational, strategic, patient experience and financial signals into one consistent recommendation.

Scoring Matrix – Outpatient (OP)



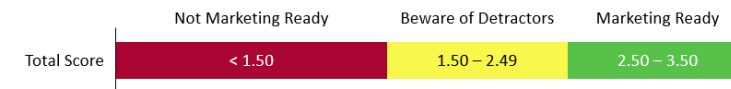
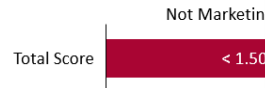
KPI	Scoring	Weighting
New Patient Lead Time	1-4	40%
Schedule Utilization	1-3	25%
Clinical Practice Standards	1-3	15%
Strategic Framework Alignment	1-3	10%
Likelihood to Recommend	1-3	10%

Clinical access carries the most weight because demand only creates value when patients can get into care.

Scoring Matrix – Inpatient (IP)



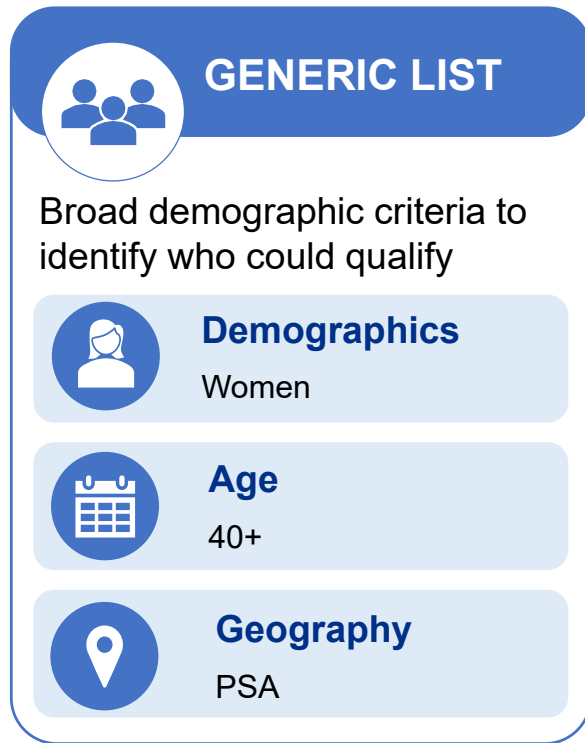
KPI	Scoring	Weighting
Lead Time/Days to First Appointment	1-4	50%
Clinical Practice Standards	1-3	20%
Strategic Framework Alignment	1-3	15%
Likelihood to Recommend	1-3	10%
Average CMI of Specialty	1-3	5%



Build A Precision Audience, Not A Generic List

The most effective campaigns start by identifying who is most likely to benefit, engage and convert.

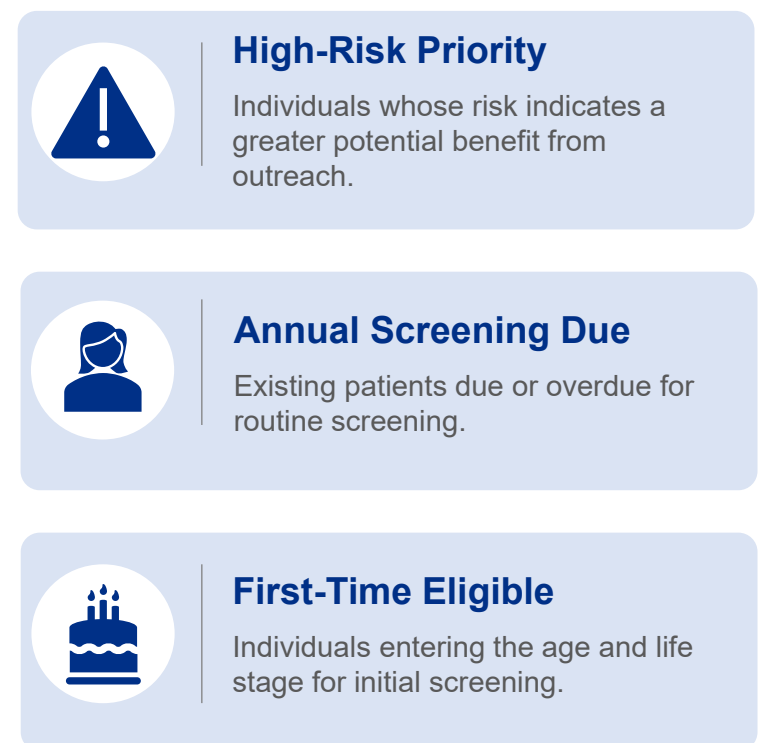
1 START BROAD



2 ADD INTELLIGENCE + CONTEXT



3 MEET PATIENTS WHERE THEY ARE



Precision is not simply a smaller list. It's a more relevant audience with a next action designed for the patient's current need.

Match the Channel to the Patient Journey

Let the patient’s need and next action determine how outreach is delivered.

Campaign	Channel	Why it Fit
Annual Mammogram	Email	Evergreen nurture
ER & Urgent Care	Email + Direct mail	Geographic access
Bladder Health	Email + Digital Ads	Patient journey + lead capture
Prostate Second Opinion	Digital Ads	Lead journey

Route Patients with Precision

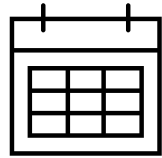
The path to an appointment matters as much as the message.

POOR ROUTING

One path for every patient.



All patients sent to the same scheduling option



First Available Appointment
(One location / one channel)



Longer
wait times



Frustrated
Patients



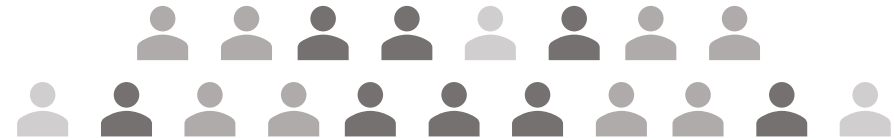
Overcrowded
Clinics



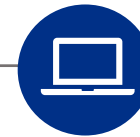
Lower
Conversion

PRECISION ROUTING

Right patient, right path, right time.



Patients routed to the best appointment option



**Direct
Scheduling**

Easy and
efficient



**Call to
Schedule**

Personalized
Support



**Form Fill &
Call Back**

Personalized
Support



Longer
wait times



Happier
Patients



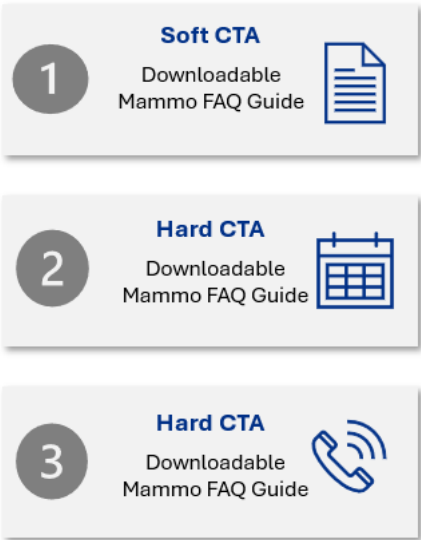
Higher Conversion
& Growth



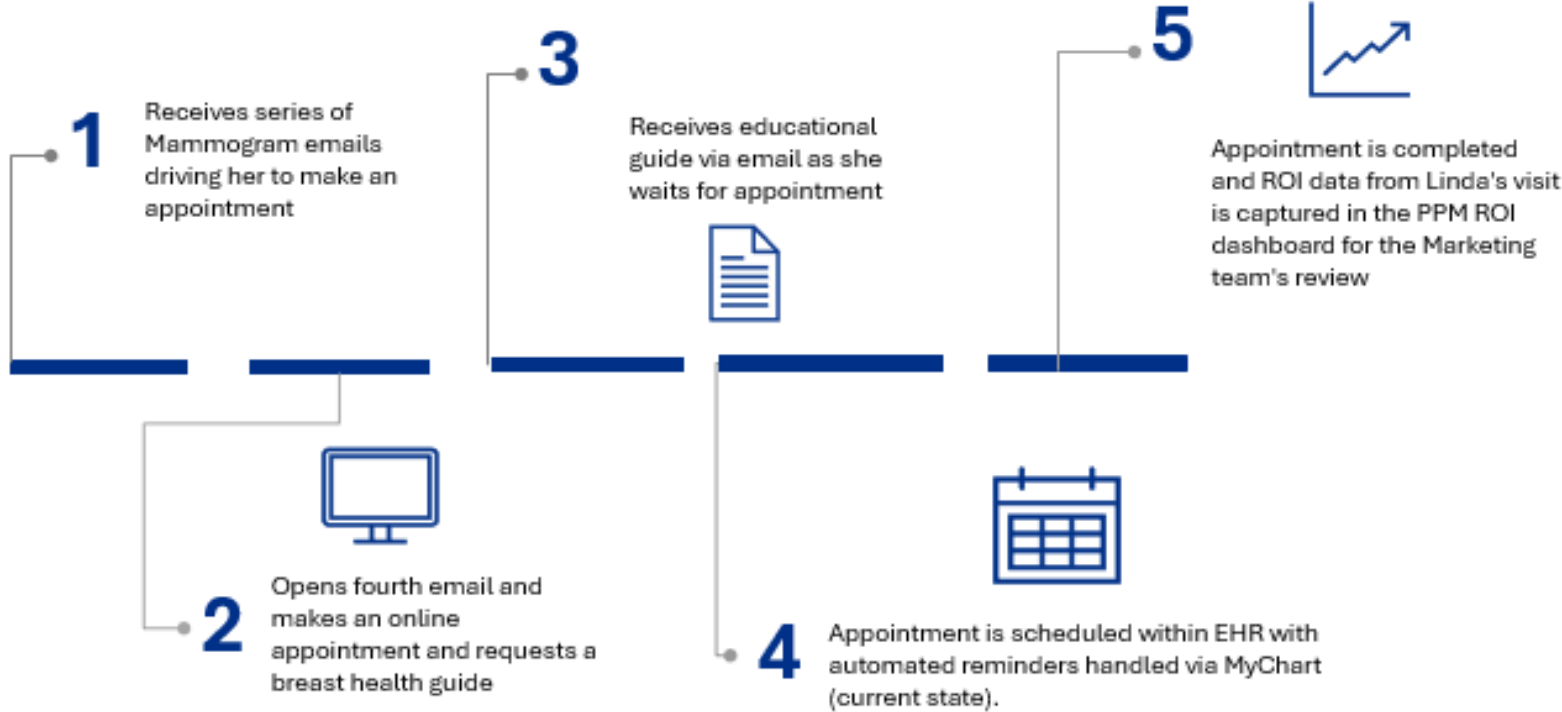
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Example: Annual Mammogram Journey

High ROI Driver with Low
Cost Per Acquisition

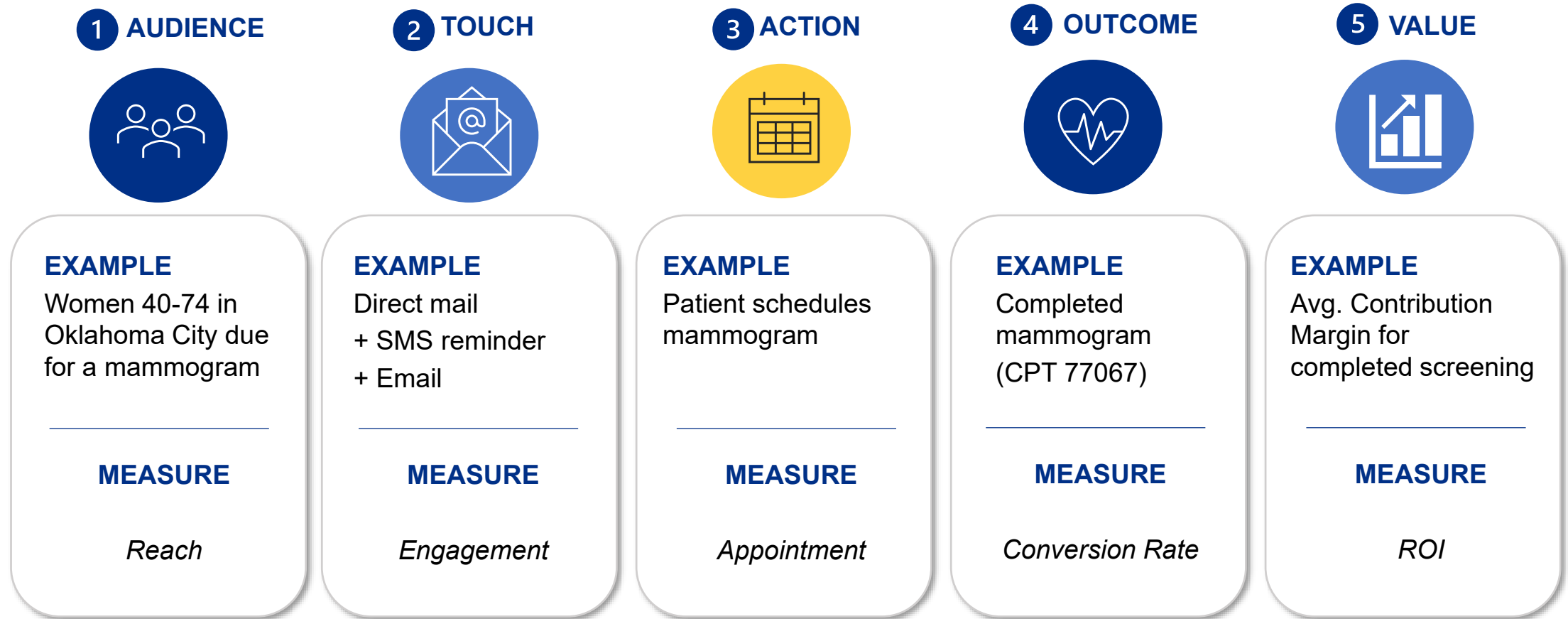


Linda Johnson
Age: 56
Existing Patient
Due for Mammogram



Connect the Campaign Member to the Clinical Outcome

Close the loop from marketing activity to clinical and financial impact.



Define it up front. Track it consistently. Prove the impact.

Consistent attribution rules ensure valid, comparable results across campaigns.



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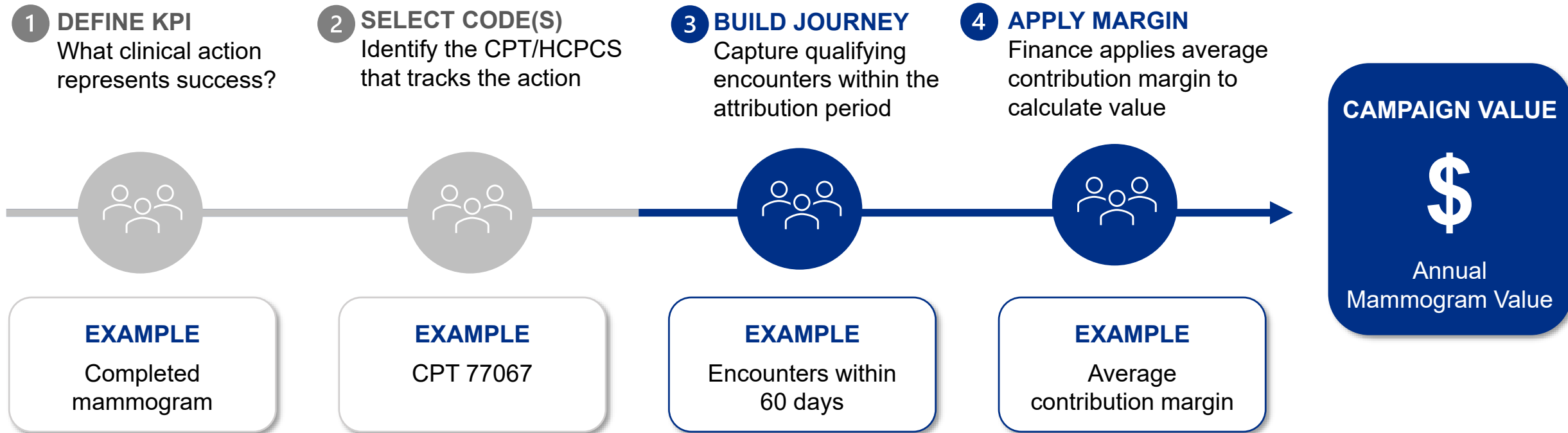
Define the Clinical Conversion Before Launch

Agree on what success looks like so everyone is aligned, measured the same way and focused on outcomes that matter.

Campaign	True Conversion		Clinical Measurement Rule	Why it Matters
ANNUAL MAMMOGRAM	Completed screening Mammogram screening		CPT 77067 Mammography; bilateral screening	Represents the clinical outcome we set out to drive and eliminates subjectivity.
LUNG CANCER	Completed screening LDCT lung screening		CPT 71271 CT chest, low dose, lung cancer screening	Tracks true screening completion, not just interest or appointments.
CARPAL TUNNEL	Procedure Median or ulnar nerve decompression		CPT 29848 / 64721 / 20526 Endoscopic release / neuroplasty / injection	Confirms the patient received the intended clinical treatment.
BLADDER	New visit + procedure New patient visit with a procedure		Defined code set E/M + urology procedure codes	Captures patients who establish care and take the next step.
BARIATRICS	Seminar + surgery Patient attends seminar and completes bariatric surgery		Defined surgery code set Sleeve gastrectomy, Roux-en-Y gastric bypass, and duodenal switch procedures	Measures full journey from education to completed journey.

Turn Clinical Outcomes Into Finance-Validated Value

We partner with Finance to apply contribution margin, so marketing performance reflects real financial impact.

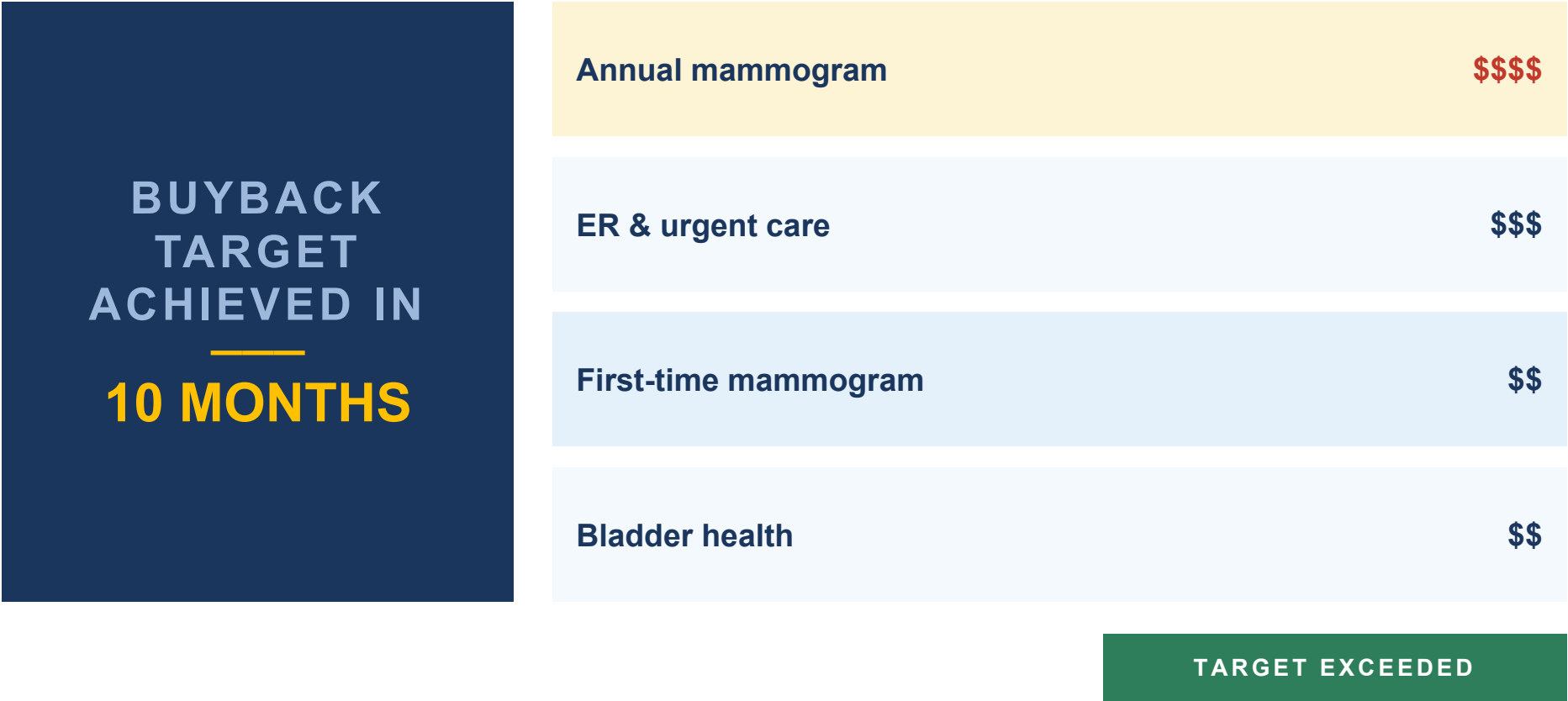



THE FINANCE PARTNERSHIP
Finance provides the data and methodology that translates clinical volume into financial value.




OUR OUTCOME
Finance-validated approach that proves marketing's impact on organizational performance.

The Initial Portfolio Crosses the Buyback Target



The real win: a system that made every future campaign more measurable.

Top Lessons Learned

What we learned so you don't have to.

1

START WITH QUICK WINS

Focus first on campaigns with a clear audience, measurable and strong operational support to build momentum and credibility.

2

KEEP AN EYE ON CLINIC OPERATIONS

The most effective campaigns are aligned with provider capacity, scheduling access and operational readiness

3

PRECISION OVER VOLUME

Smaller, highly relevant audiences consistently outperform broad outreach when the goal is action and conversion.

4

GET FINANCE INVOLVED EARLY

Early alignment on goals, attribution, and ROI helps demonstrate value and secure long-term investment.

5

CONTINUOUS OPTIMIZATION BEATS PERFECT PLANNING

Launching, measuring, and refining campaigns delivers greater long-term impact than waiting for a perfect strategy before taking action.

6

NOT EVERY GROWTH OPPORTUNITY BELONGS IN CRM

CRM works best when there is a defined audience, clear trigger, and actionable next step for the patient.

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Questions?

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

Claire Turmelle



Director of Marketing & Consumer Strategy, OU Health



Claire Turmelle is the director of Marketing & Consumer Strategy for OU Health, Oklahoma's only comprehensive academic health system. She oversees marketing strategy and market intelligence for the \$3 billion health system, including for Oklahoma Children's Hospital and Stephenson Cancer Center, the state's only NCI-designated cancer center. She spearheads data-driven, precision patient marketing strategies for targeted customer acquisition, harnessing CRM platforms and market insights to drive enterprise-wide alignment and operational readiness. With more than a decade of healthcare marketing experience, Claire holds a bachelor's degree in economics from the University of Oklahoma and an MBA from the University of Oklahoma Price College of Business.

Caroline Rykard



Caroline Rykard is the *Manager of Market Intelligence & Consumer Insights* at OU Health, Oklahoma's only comprehensive academic medical system. She leads a team focused on market research, consumer insights and brand storytelling to drive strategic growth. With a background in data analytics, Caroline previously worked on the organization's business intelligence team, where she played a key role in implementing the Epic electronic health record system. Her team also led implementation of OU Health's CRM and continues to oversee its optimization through data governance practices that ensure data quality and enable actionable insights through analytics and reporting. Caroline holds a bachelor's degree in marketing communications and a master's degree in business analytics and data science from the Spears School of Business at Oklahoma State University. She also earned an MBA from the Price College of Business at the University of Oklahoma.