

SHSMD26 CONNECTIONS

Health Care Marketing, Strategy & Communications

American Hospital Association Conference
September 27-29 ∙ Baltimore

Entering Our Growth Engine Era: Rewiring Marketing for Growth

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John Breen

Managing Director

The Strategic Architect

Finds the opportunity in
complexity.



Rachel Lott

Director, Consulting Practice

The Pragmatic Visionary

Equal parts strategist and
storyteller.

Learning Objectives

1. Understand what industry trends are indicating about marketing's role in growth today.
2. Identify the sources of organizational growth and how to connect them to marketing's role.
3. Connect marketing strategy to organizational priorities, building the case for the resources needed to execute.

The growth mandate
has *changed*.

How is MarCom
changing with it?



Cost Containment

AI Enablement

Revenue Growth





01

**What is the
data telling us?**

02

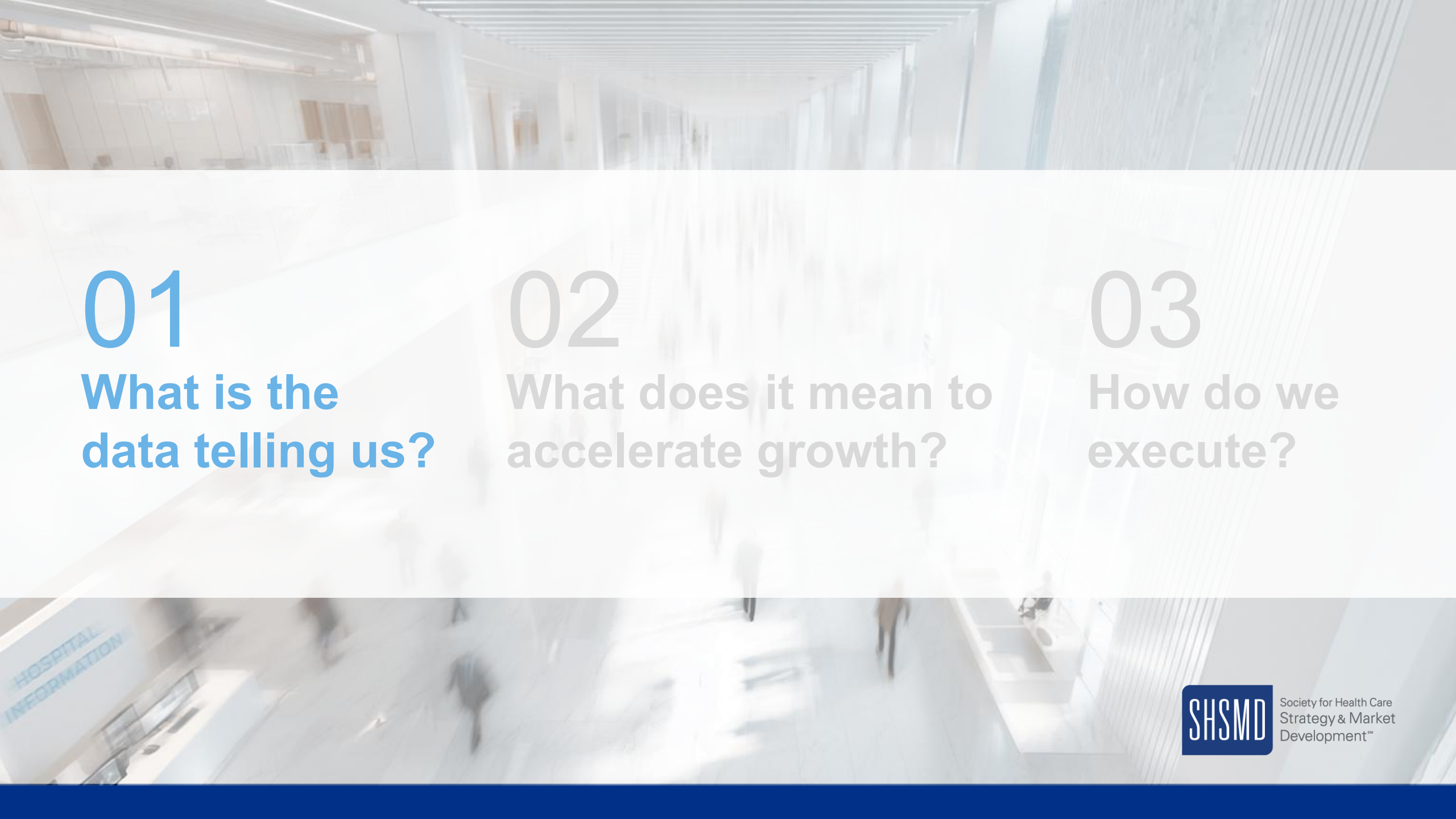
**What does it mean to
accelerate growth?**

03

**How do we
execute?**



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Growth is rising as a priority, but budgets are under pressure.

85%

of respondents say
Growth is a Top MarCom Priority

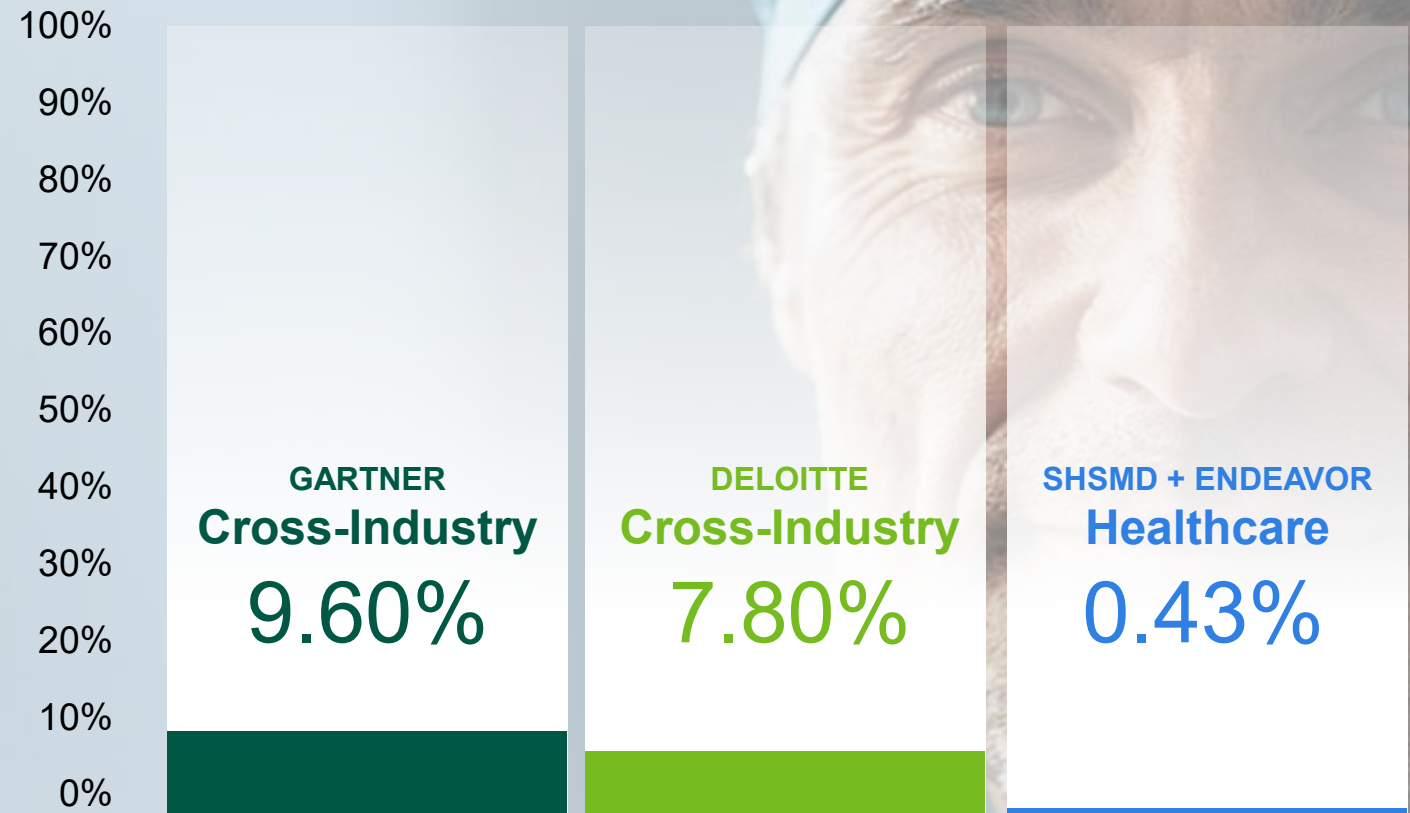
68%

report MarCom budgets
flat or down vs. prior
year +24pp YoY

Sources: BTN: MarCom 2025–2026 Panel 4; Q38. Which of the following are key strategic priorities for your MarCom organization? Select up to 5. n=20.

MarCom is funded like a **cost center**.

Cross-Industry Median Budget to Revenue Ratio*



*Note: Cross-industry benchmarks are not directly apples-to-apples with provider MarCom budget-to-net patient revenue ratios, but they provide directional context on relative investment levels.

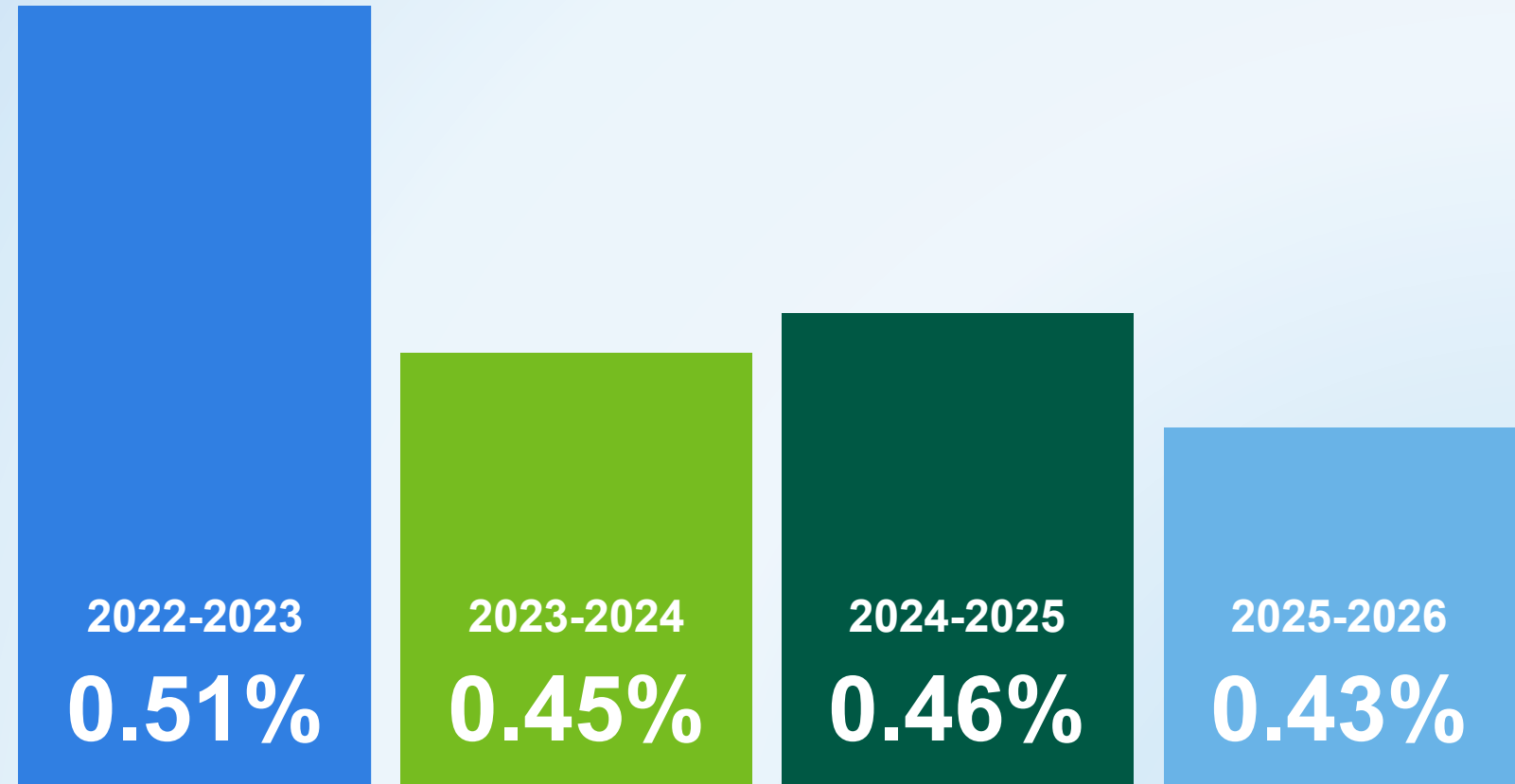
Sources: Gartner, Insights from the 2026 CMO Spend Survey (n=401); Duke | Fuqua, Deloitte, AMA, 2026 The CMO Survey® (n=146); SHSMD, Endeavor, BTN, MarCom 2025-2026 (n=60).

Growth expectations are rising, but relative MarCom investment has declined.

Note: .51% (22-23 Median) - .43% (25-26 Median) = .08pp; .08% * 1B Revenue = \$800K

Sources: SHSMD, Endeavor, BTN, MarCom Surveys 2022-2026.

Healthcare Median Budget to Net Patient Revenue Ratio Trend

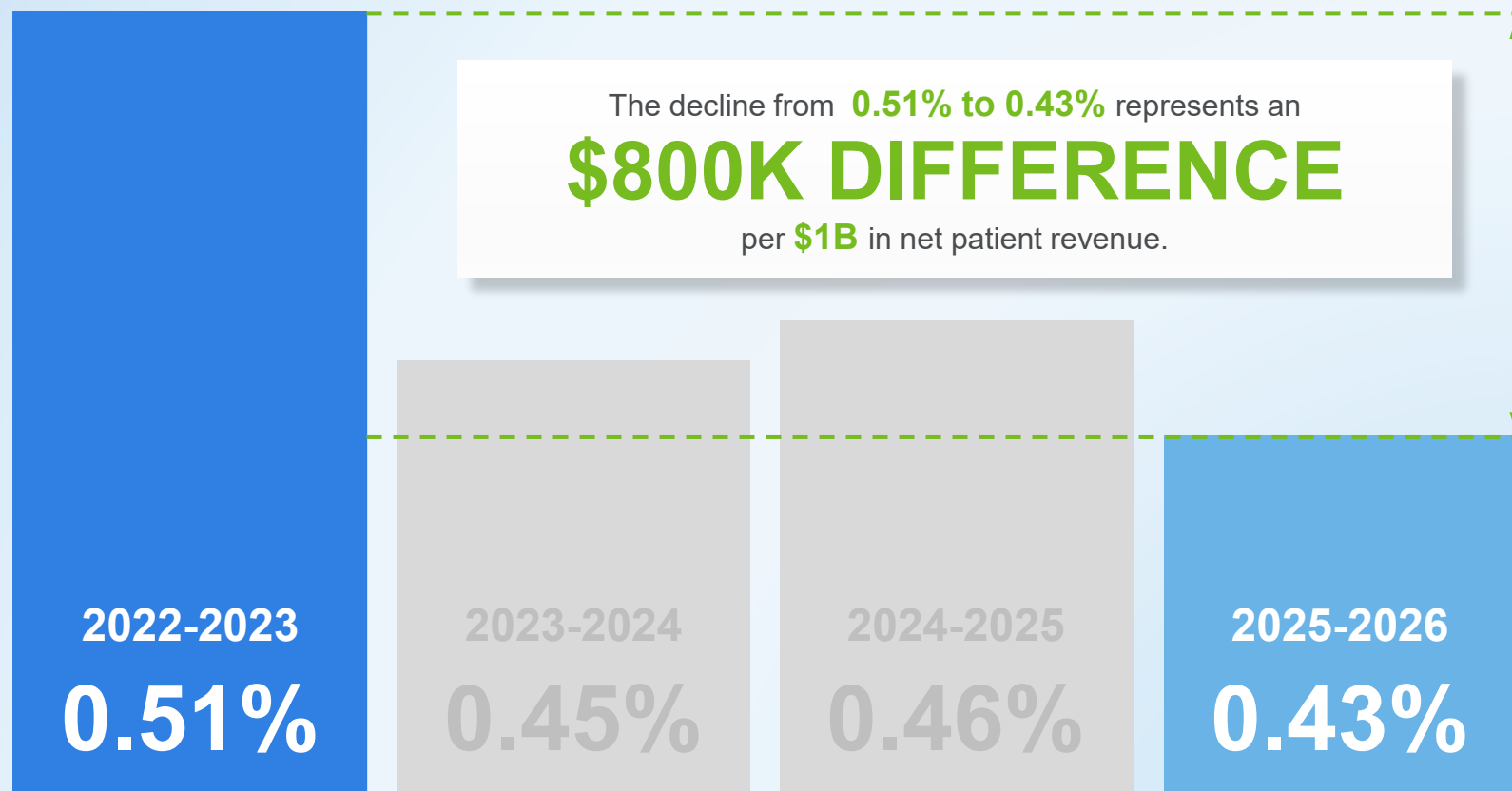


Growth expectations are **rising**, but relative MarCom investment has **declined**.

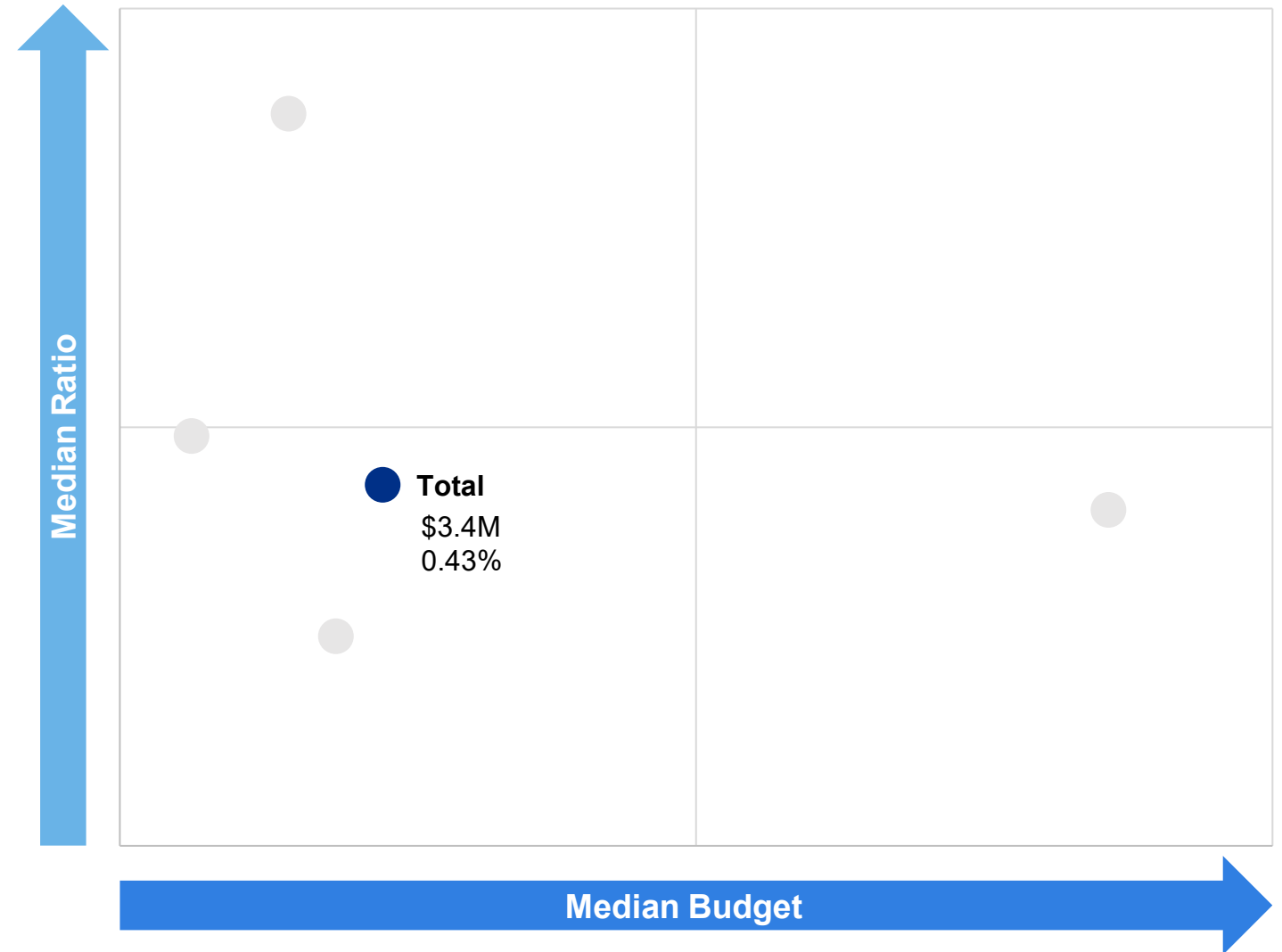
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Healthcare Median Budget to Net Patient Revenue Ratio Trend

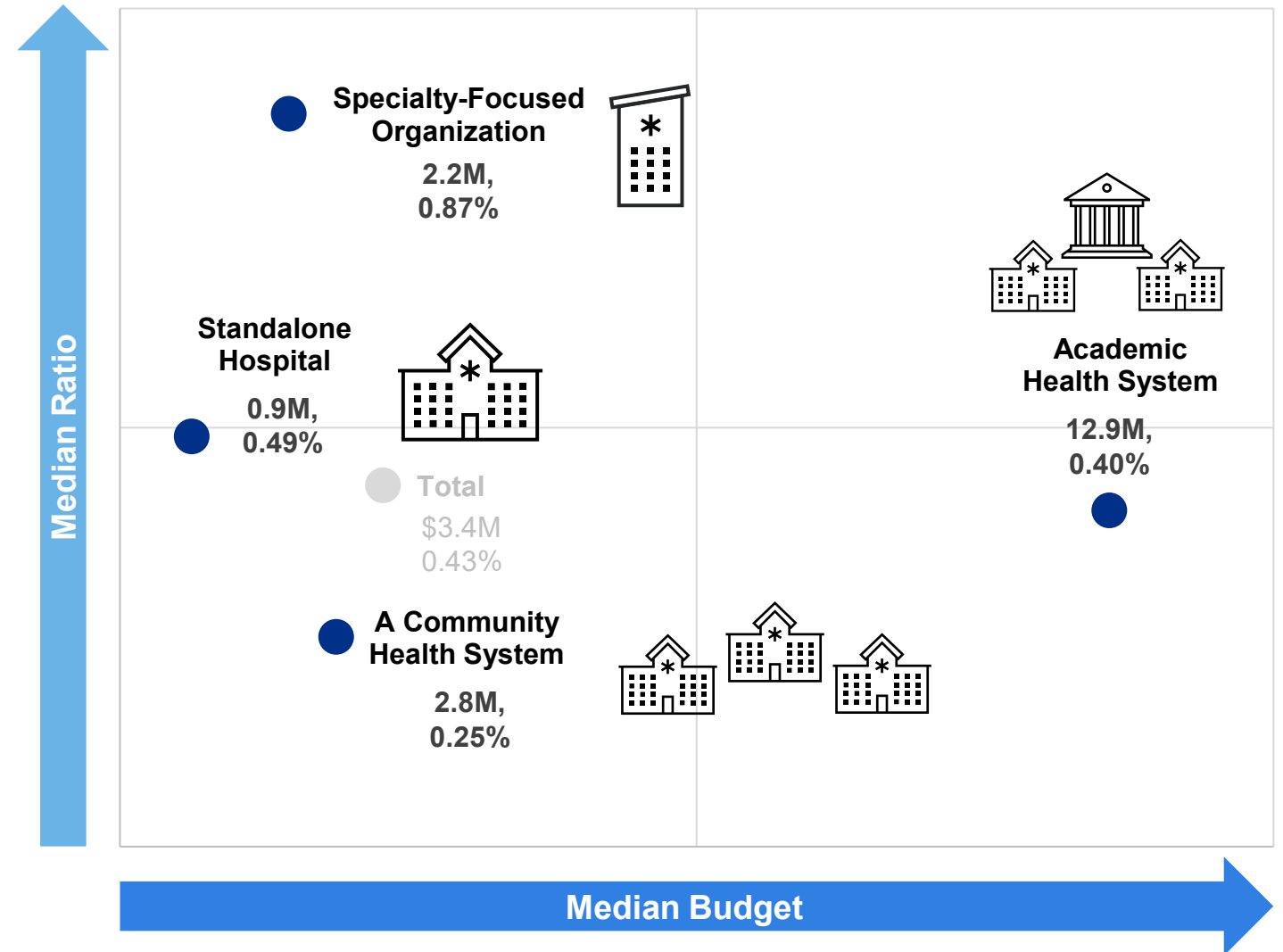


Typical
MarCom
budget is
\$3.4M – but
what is
typical?



Source: BTN: MarCom 2025–2026 Panel 1;. Total n=60; n >= 11 among subgroups.

Scale and specialization change what **typical** looks like.

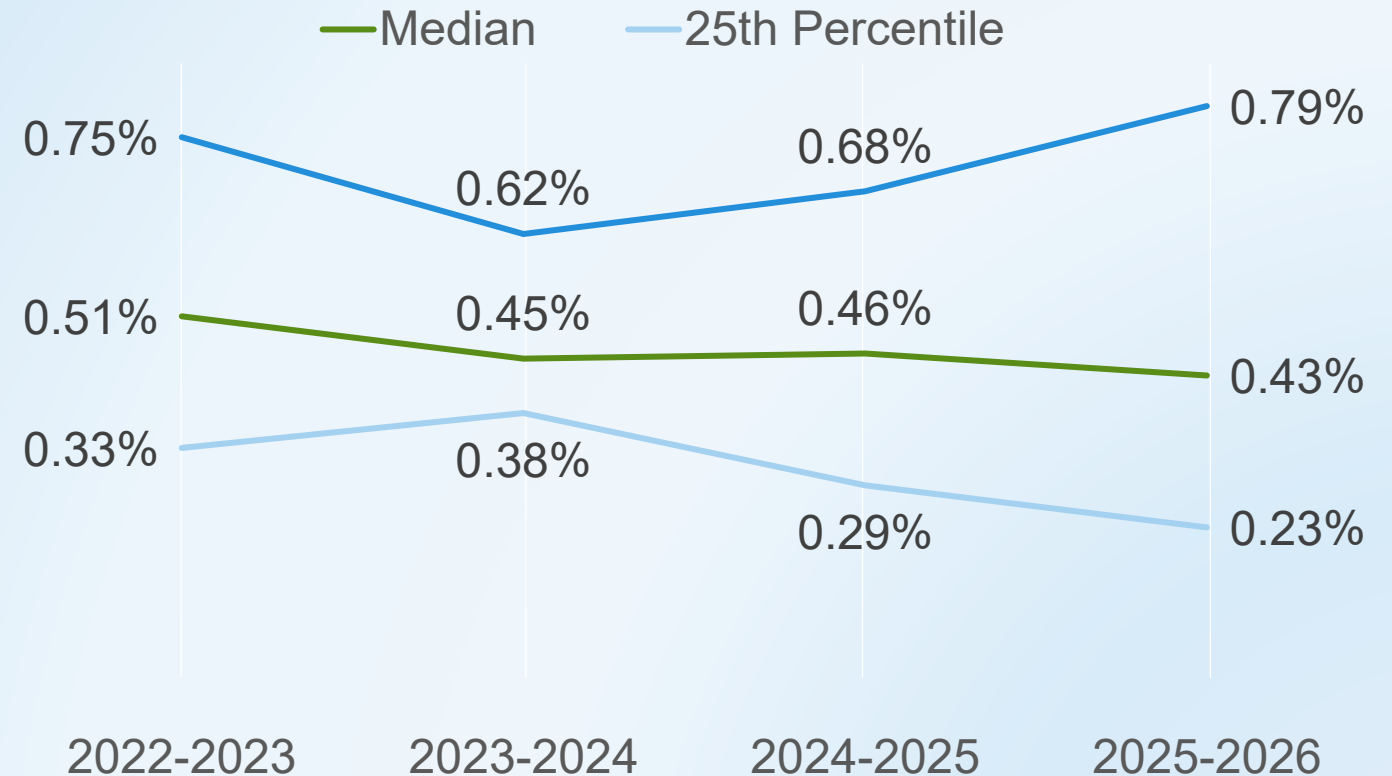


Source: BTN: MarCom 2025–2026 Panel 1; Total n=60; n >= 11 among subgroups.

Two MarCom models are emerging: Is your team a growth engine or support function?

Sources: SHSMD, Endeavor, BTN, MarCom Surveys 2022-2026.

MarCom Budget to Net Patient Revenue Ratio Distribution Trends



Investment
gaps
become
growth
capability
gaps.

System With \$1B Revenue

$$\begin{array}{r} \$7.9\text{M} \\ - \$2.3\text{M} \\ \hline \$5.6\text{M} \end{array}$$

Budget at 75th Percentile
(Ratio = 0.79%)

Budget at 25th Percentile
(Ratio = 0.23%)

Potential Growth
Capability Gap

Source: BTN: MarCom 2025–2026 Panel 1; n=60.



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**What is the most
unhinged marketing
request you've ever
received?**

**Let's put an ad on
the bluegrass
station my kids
love!**

**Put your big boy pants on and
get a dedicated marketing person
for my cardiology practice!**

**We need to buy every
billboard in town so
our competitor can't.**

**Can we make billboards like
Buc-ee's for my podiatry practice?**

**I need a 6-figure campaign.
Get it done for \$6K.**

**We need to start a cable channel
for the hospital and get med
device companies to pay for it.**

**Can you put a billboard
on the road my wife
drives every day?**

**Here's a new logo my kid
designed. Let's switch to
this on our collateral.**

**Can you set up an online invite for my
Christmas party and monitor the RSVPs?**

How is Marketing Perceived?

You can't
operate as a
growth engine
if the
organization
sees you as a
service desk.

Doer

"Make this."

Promoter

"This is what we're doing. Tell everyone."

Fixer

"Volumes are down. We need a campaign."

Cost Center

"Revenue's down, so we need to cut your budget."

Sources of Organizational Growth



Deepen

Capture more of the demand you already have.



Widen

Expand the services you already offer.



Monetize

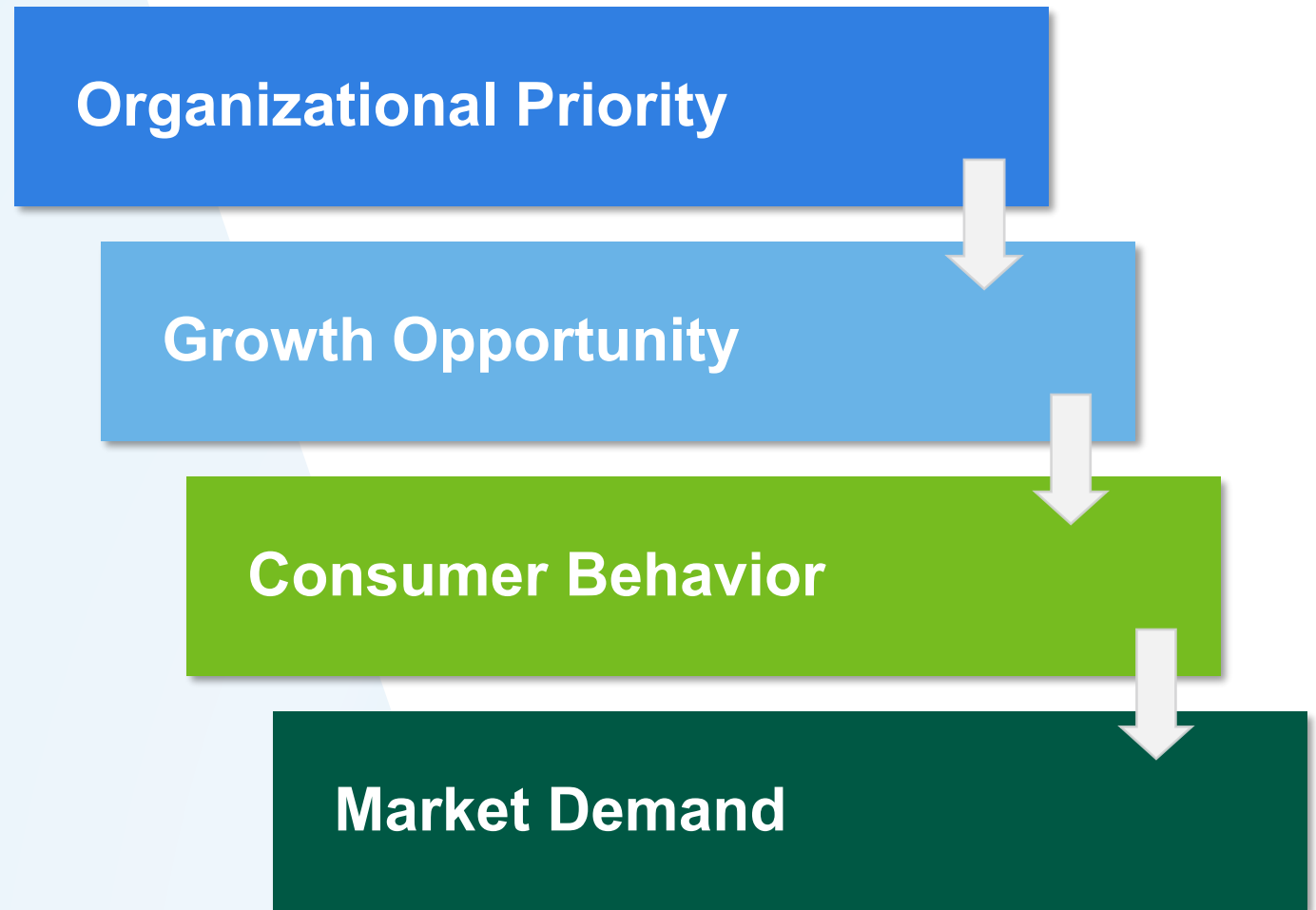
Sell what you already own.



Invent

Build what doesn't exist yet.

**Marketing's
role is to
connect
organizational
priorities to
market
demand.**



**Benchmarks are
the beginning of
a more
meaningful
conversation
with your
leaders.**



What will it take to reposition MarCom from a cost center to a true growth partner?



How well are our investments aligned with our organization's growth priorities?



What capabilities will MarCom need three years from now—not just today?



Where can technology and AI create the greatest leverage?



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Rewire Marketing for Growth

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Start With the Growth Strategy

What are the growth priorities?
What are the sources of growth?

02

Define MarCom's Role

For each growth priority, what consumer behavior does marketing need to influence?

03

Assess the Capabilities Required

What people, data, technology and competencies are required to deliver?

04

Identify the Gap & the Tradeoffs

What do we have today and what's missing?
What should we stop, start or scale?

05

Build the Investment Case

Use benchmark data to validate the ask and tie resources to the expected outcome.



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What can you do Wednesday morning?



Identify the growth priorities.

Pull your strategic plan. Circle 3-5 of the most important growth items.



Define your role.

For each priority, write down the primary behavior MarCom needs to influence.



Assess the need.

Name the critical capabilities needed to deliver on this priority.

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Questions?

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

John Breen, Managing Director, Consulting Practice Endeavor Management

John Breen is a healthcare strategy and brand leader who helps organizations navigate change, accelerate growth, and build stronger connections with the people they serve. Over his career, John has helped shape and steward billions of dollars in brand value, advising leading healthcare organizations through periods of growth, strategic change, and reinvention.

Today, John leads the consulting practice at Endeavor Management, advising hospitals and health systems on strategy, growth, and branding. Previously, he held a sector leadership role at kyu collective, working alongside leading design firms including IDEO, and led strategy and analytics at the health division of Interbrand, a global branding firm best known for pioneering brand valuation.

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Rachel Lott, Director, Consulting Practice Endeavor Management

Rachel Lott is a healthcare marketing communications and strategy consultant and former executive. She currently serves as Director, Consulting Practice at Endeavor Management, where she advises hospitals and health systems across the country on growth strategy, brand positioning, physician relations, fundraising, change communications and stakeholder engagement.

She previously served as Chief Communications Officer for Hillsdale Hospital, an independent rural hospital in Michigan. Earlier in her career, Lott entered the healthcare industry as Marketing & Patient Experience Manager for IU Health Bedford Hospital, a critical access hospital in southern Indiana.

Lott has also held leadership positions in public relations consulting and economic development organizations.

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