

Catalyst Conversation: Marketers

Session Discussion Notes & Summary Guide

1. Governance & Process Alignment

Discussion Question: *What governance structures (committees, intake processes) have worked to keep efforts aligned with strategy rather than becoming reactive to one-off requests?*

- **Evolving Terminology & Structure:** Teams discussed rebranding "Governance" to "Enablement" to project a supportive posture rather than a restrictive one. Regular quarterly cross-departmental collaboration is essential to align on priorities and operations, particularly around rapid response.
- **Intake & Project Management:** Leveraging centralized project management tools (such as Wrike, Jira, Hive, or Asana) replaces informal email chains and streamlines incoming requests.
- **Managing One-Off Requests:** Establishing formal intake request forms and marketing request forms allows teams to dispatch requests efficiently or cleanly push back (e.g., providing standard templates or polite decline paths) to keep departments from going "rogue".
- **Front-End Vetting:** Involving IT, Legal, and other compliance stakeholders early ensures proper Business Associate Agreements (BAAs), vendor text reviews, and alignment with overall strategy.

2. AI Tools for Results & Efficiency

Discussion Question: *How are you using AI or other tools to help with results and efficiency (especially in the face of budget cuts)?*

- **Productivity Gains & Task Allocation:** AI serves as a powerful thought partner for mid-layer research, write-ups, keyword searches, ad group segmentation, and pulling competitor/web analytics.
- **Tool-Specific Use Cases:**
 - **Copilot:** Utilized for tasks, records, summaries, IT training, and cleaning up meeting transcripts.

- **ChatGPT / Custom Agents:** Deployed for creative brainstorming, graphic design writing support, formatting internal communications, and analyzing vendor text.
- **Specialized AI Agents:** Built specifically to streamline marketing briefs and workflows.
- **Prompt Engineering (The CRAFT Framework):** Emphasizing frameworks like **CRAFT** (Context, Role, Audience, Format, Tone, Example) optimizes prompts for low token usage and precise messaging. Other effective strategies include prompting the AI to ask clarifying questions sequentially rather than all at once.
- **Overcoming Hesitancy:** Addressing varying levels of AI-hesitancy or age-related adoption hurdles among current teams and prospects is vital when rolling out new efficiencies.

3. AI Policies, Security, & Closed Platforms

Discussion Question: *Where are you in the process of developing AI policies? Are you seeing a shift toward organizations building internal “closed” platforms to maintain control over HIPAA and the patient experience?*

- **Policy Development Status:** Most organizational AI policies are still in their early development stages or being built from the ground up.
- **The Shift to Closed Systems:** There is a clear push toward in-house operating systems, hospital strategy boards, and closed platforms to maintain strict control over brand integrity, data security, HIPAA compliance, and patient experience.
- **Preventing Brand Misapplication:** Unvetted external tools can lead to rogue material (such as unapproved flyers created by individual physicians). Restricting publishing rights to designated admins and utilizing 3rd-party validation/diffusion models helps enforce guardrails.
- **Accountability:** A major open question currently facing organizations is defining clear consequences and accountability protocols when someone violates internal AI policies.

4. Patient Experience & Brand Promise

Discussion Question: *How do marketers effectively influence patient experience to help ensure the brand promise matches the clinical reality?*

- **Start-to-Finish Research:** Moving effectively from a macro market experience to a micro clinic experience requires researching target audiences, adapting to customer needs, and monitoring key metrics like Net Promoter Score (NPS).
- **Bridging Traditional and Digital Channels:** Balancing traditional avenues (such as print mailers driving phone calls) with digital touchpoints, like QR codes for immediate engagement, ensures timely communication.
- **Brand Guardianship:** Ensuring tight alignment across multiple hospitals, clinics, and service lines so that the external brand promise accurately mirrors the internal clinical reality, while addressing negative feedback or accessibility issues promptly.