

Consumer Journey Mapping: Driving Revenue by Reaching Patients at Critical Decision Points

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SOCIETY FOR
Healthcare Strategy & Market Development™
of the American Hospital Association



Today's topics

1

What is the consumer decision journey?

2

Why is this important for marketers?

3

How do I map the consumer decision journey?

4

How can it transform our approach to marketing?

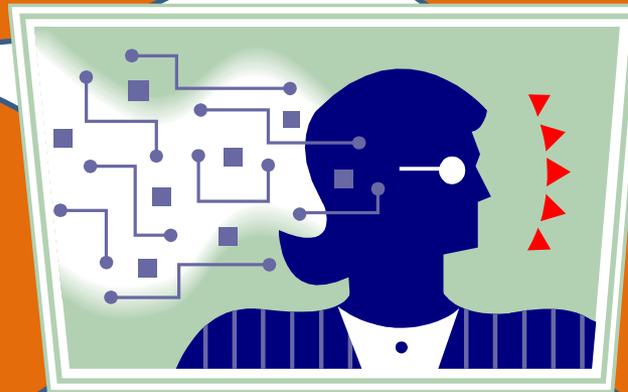
What is the customer journey?

What is the consumer or customer journey?

Critical points of interaction that most influence customer choice

Total brand experience as defined by the customer

How consumers consider, select, buy, use and advocate brands



Multi-platform customer engagement across time

The complete sum of experiences that customers go through when interacting with your company and brand.

What is consumer decision journey mapping?



Customer journey mapping is the process of recording the customer's decision points and experiences at each step of their interaction with a service or brand

What do marketers need to know?

- ➔ What is the decision process consumers undertake in evaluating and selecting healthcare services?
- ➔ What are the touch points or “moments of truth” that most influence consumer choice?
- ➔ How can we define and create the ideal customer activation, engagement and acquisition experience?
- ➔ What gaps exist between what we currently do and what we should be doing?
- ➔ How do we convert customers to brand advocates?

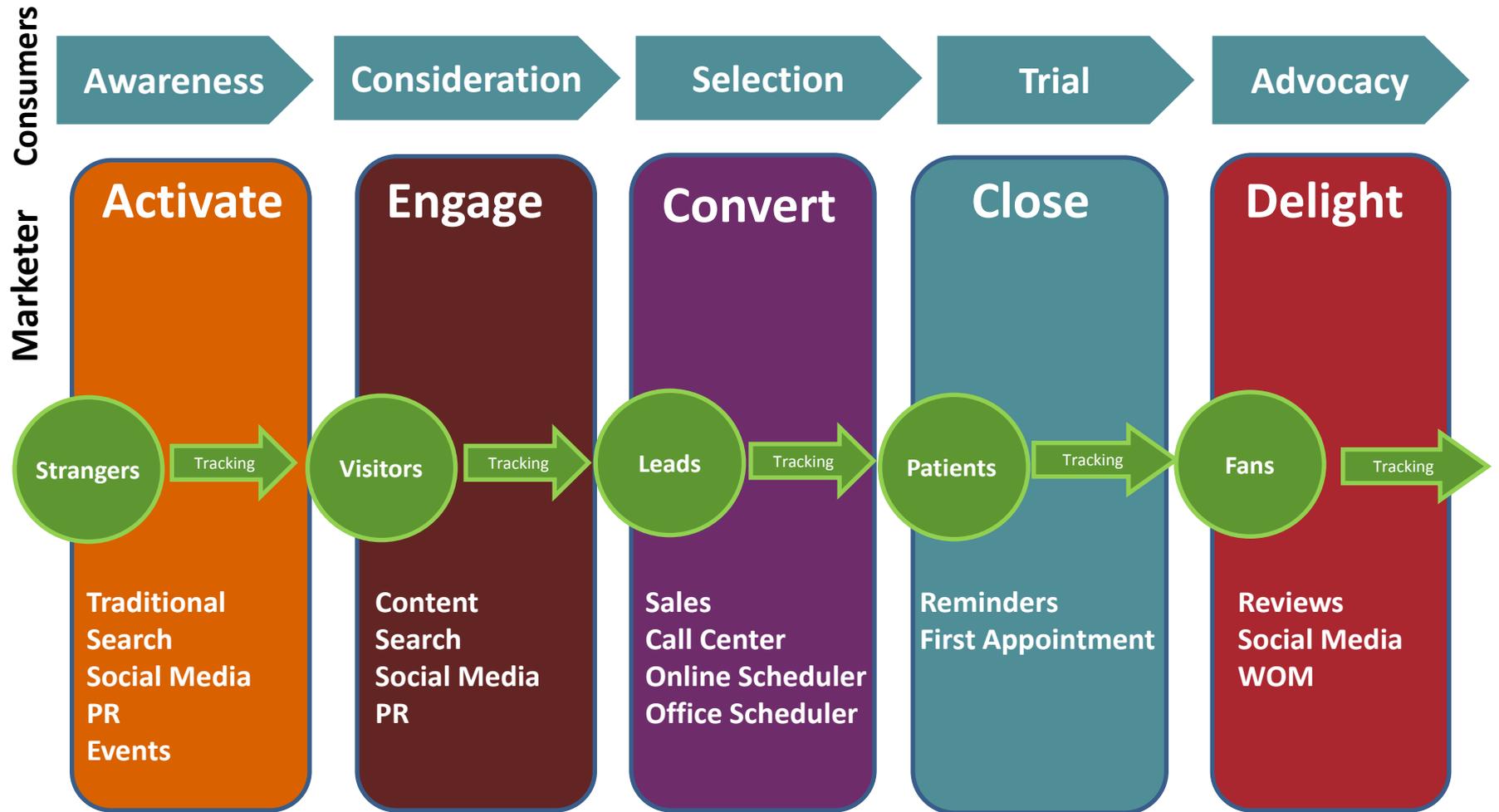
Stages of the consumer decision journey

Decision Cycle	Marketing Goals
Awareness	Raise awareness and stimulate demand.
Consideration	Differentiate brand and service offerings.
Selection	Convert customer inquiry to appointment or purchase.
Trial	Deliver positive experience; stimulate repeat purchase.
Advocacy	Gain brand commitment and word of mouth endorsement.

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Mapping marketing processes to the journey



Visualizing the decision journey

Young Families Segment



The **Young Families Segment** is primarily made up of 25-35-year-olds with 1 or 2 children. With their busy lives, they rely heavily on the Internet to do their research, whether through their computer, tablets, or smartphones. They primarily talk to friends and family (especially other young parents) to make decisions.

Access to their children's pediatrician is the make-or-break criterion for a health plan. Once that is known, premium and wellness options are also important, as are an easy-to-use website.

Short Process | Long Process
Do Not Consider Brand | Brand Shopper
Prefers Simplicity

"I would have liked Frequently Asked Questions or would like to talk to an online person. I'm not a paper person so did everything online." – Young Families Customer

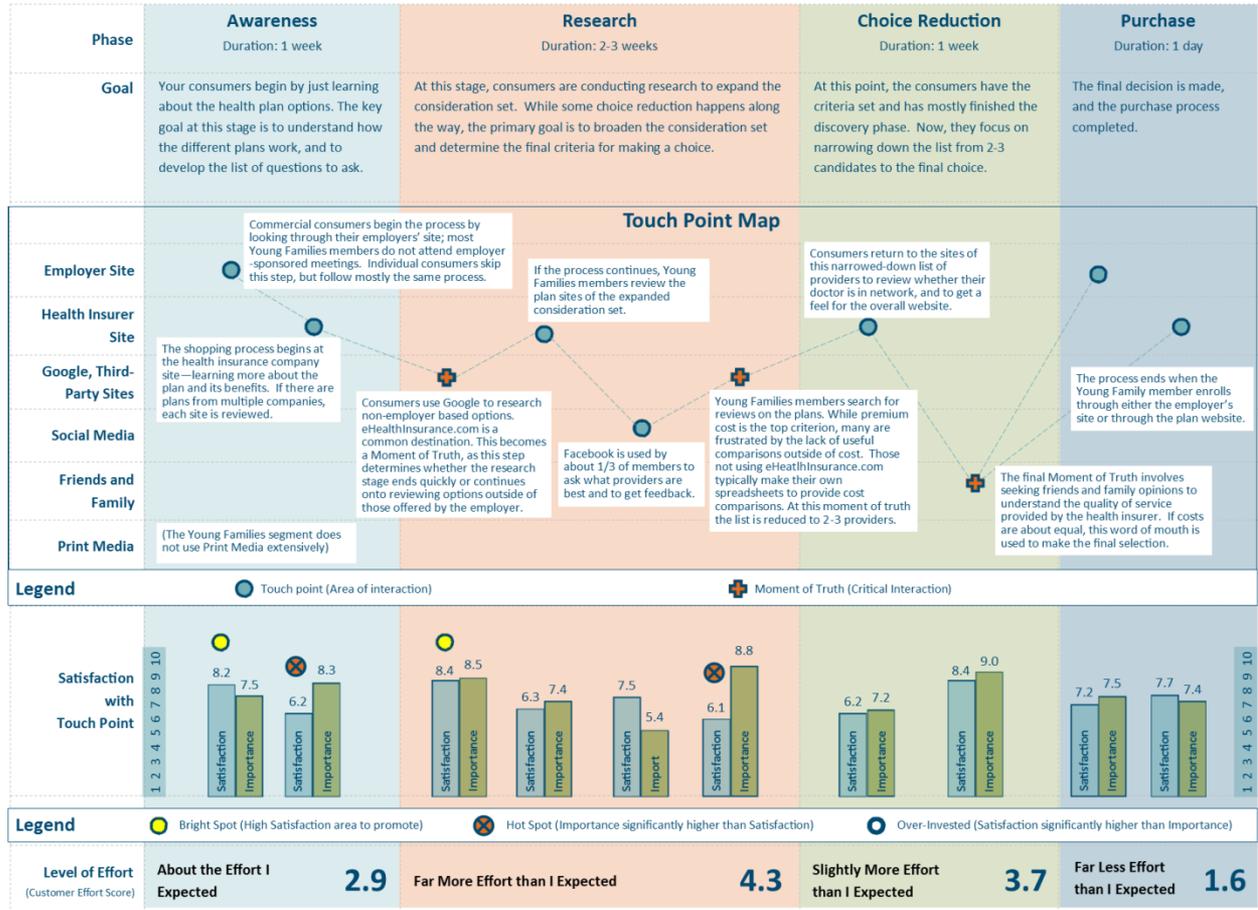
"The only problem is there are so many choices. I'm not sure if that makes it easy or hard. It was overwhelming - difficult because there is a lot to think about and I felt it was hard to figure out what was best." - Young Families Non-Customer

Create your own Customer Experience Journey Map



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Health Insurance Purchase Journey Map



Source: www.heartofthecustomer.com

Consumer Decision Journey Map



Phase	Awareness	Consideration	Selection	Trial	Full House
Description	The journey begins when our consumer seeks information about primary care physicians.	At this stage, she is learning more about the physicians that were recommended to her; she will both broaden and narrow her choices.	Our consumer has narrowed her choices to one or two candidates, and moves to a final decision as she acts to schedule an appointment.	Our consumer shows up for her appointment, checks in and meets the physician for the first time.	
Marketing Objective	Activation	Engagement	Conversion	Closure	
<p>The consumer's need is triggered by an event (e.g., moved, doctor retired, etc.) or stimulated through marketing activities.</p> <p>Friends & family</p> <p>Google, other search sites</p> <p>Review sites, 3rd party sites</p> <p>Social media</p> <p>Provider website</p> <p>Call center</p> <p>Doctor's office</p> <p>Other</p>	<p>The process most commonly begins by asking friends, family or co-workers for recommendations.</p> <p>The consumer begins an internet search to learn more about the doctors recommended to her. This may begin with Google, followed by other sites such as HealthGrades, Yelp, message boards, chat rooms, a provider's website, or news stories about the doctor.</p>	<p>She gathers more information by looking at their photos, reading about their education and experience, watching videos, following blogs or message boards. During this process she's eliminated a couple of names, but added a few others that she found interesting.</p> <p>She seeks validation from social communities, asking friends about experience with her short list of doctors, posting on message boards or following the blogs or Facebook sites of the providers.</p> <p>She double-checks with her health plan to verify that her final candidates are participating providers.</p>	<p>She visits the provider's website to verify location, hours of operation, and type of insurance accepted by the doctor, then calls the call center or office to obtain the information.</p> <p>With the list narrowed to one or two, the final choice is made when she makes the appointment; her first "patient experience" is with the office staff.</p>	<p>She receives an appointment reminder, information and instructions regarding her first visit.</p> <p>She shows up for her appointment, meets with the front office staff, and sits in the waiting room until the nurse calls her back to the exam room and she meets the doctor for the first time.</p>	<p>The FULL HOUSE segment includes older Millennials, GenX, and younger Boomers. Two-thirds are married with children, the majority have attended college. 90% are insured; two-thirds through their employer. Their lives are busy and they rely on the internet for socializing, shopping and scheduling. They prioritize family health and are especially proactive about their kids, sometimes putting their own health needs on the back burner. They want a good relationship with providers, but also also convenience and ease of use.</p>
TOUCHPOINTS STRATEGY	Stimulate demand. Optimize provider profiles. Help consumers search.	Create branded online experience. Showcase providers & practice. Expand web presence/engagement.	Hardwire conversion points. Develop virtual concierge. Script, train staff	Design first visit experience. Demonstrate active listening. Proactive ongoing engagement.	<p>Definition of Quality Care</p> <ul style="list-style-type: none"> • Skill, expertise, professionalism • Clarity in explaining things • Thoroughness in approach to my care • Treats me like a person, not a patient • Respect for patient
CLOSING THE EXPERIENCE GAP	Stimulate search and inquiries for PCPs, and make it easy for consumers to find relevant, detailed, quality information about our physicians.	Create a rich, online experience that brings our brand positioning to life and showcases attributes important to consumers.	Provide easy, accessible phone and online scheduling processes, and create a consistent, high quality experience that converts prospects to appointments.	Create a satisfying and memorable first appointment experience. Stay engaged up to, during and following the first visit.	<p>Choice Influencers</p> <ul style="list-style-type: none"> • They really listen to patients • They have the skill & expertise I'm seeking • They treat people with respect • They have a good reputation • They give great advice

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Why is this important for marketers?



- Restructuring markets and intensifying competitor activities
- New reimbursement methods and care delivery models that require greater emphasis on customer engagement
- **Explosive growth in *web, social, search and mobile* technologies changing consumer behaviors**

**“If marketing has one goal, it’s
to reach consumers at the
moments that most influence
their decisions.”**

McKinsey Quarterly. Consumer Decision Journey. 2009



Today, more often than not, a healthcare consumer's journey begins online.



80% of internet users have looked online for information about health topics such as a specific disease or treatment.



77%

of online health seekers say they began their last session at a search engine such as Google, Bing, or Yahoo

35%

of U.S. adults have used
the Internet to try to
figure out what medical
condition they may have

53%

of online health diagnosers
talked to a clinician about
what they found online





C2B Marketing

Consumers have “reverse engineered” marketing.

Source: LaunchMedia



Pre-Tailing

Consumers search websites, blogs,
ratings, & brands before purchasing

Source: LaunchMedia



Hyper Transparency

Quality, pricing, availability, offers, recommendations, ratings are just a click away.

Source: LaunchMedia



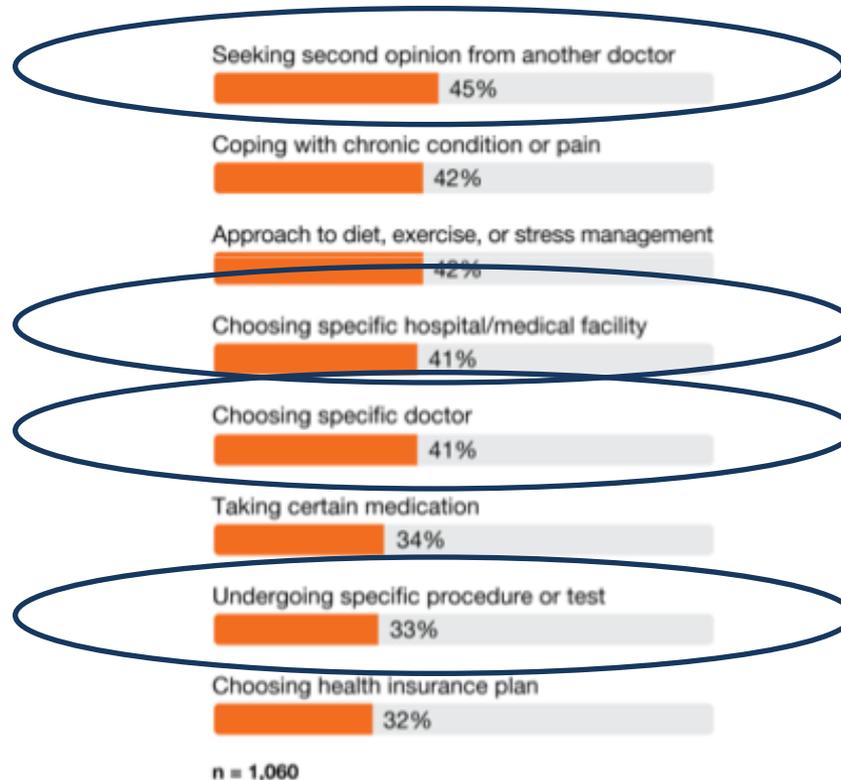
Cloud Trust

Consumers trust bloggers,
reviewers & social communities.

Source: LaunchMedia

Social media is word of mouth

41% said information found through social media influences their choice of providers



Source: PwC HRI Social Media Consumer Survey, 2012

Social Media = All User Generated Content

Mapping the Journey



Start by listening.



What do you need to discover?

Actions	What is the consumer doing at each stage of the journey? Where are they turning for information?
Motivations	What encourages the consumer to move on to the next stage? How can you proactively engage at that point?
Questions	What information are consumers searching for? Are you there with content to help with decision-making?
Obstacles	What issues keep consumers from completing the sales process <i>or</i> choose another brand?
Endorsements	Where do consumers turn for validations or endorsements? What would make them publicly endorse your brand?

Consumer

Marketer's Objective

Strategy

Discover

Engage

Engage:

Engage through web, social and search when are most open to receive messaging.

Consume

Educate

Educate:

Educate your target audience and build brand awareness.

Engage

Encourage

Encourage:

Encourage your audience to act through strong calls to action through content that positions you as the preferred choice.

Action or Purchase:

Provide a clear path for users to act .



Move to Action

Joint Replacement Consumer Decision Journey Mapping

Charlie's Story

- 61 year old high school coach.
- Suffers chronic joint pain from degenerative arthritis.
- Finding it harder to meet the physical demands of his job.
- Has been trying to avoid surgery, but finding medication and other non-surgical methods increasingly ineffective.



Charlie is in the awareness stage of his journey

Buying Cycle	Marketing Goals	Key Words	Social Topics
Awareness	Raise awareness and stimulate demand.	Causes of knee pain, knee pain diagnosis, knee pain treatment options, pain relief options, when to see a doctor	Living with knee pain, living with arthritis, knee exercises, aging athletes, aging fit, sports injuries, home remedies



- Actions:**
- Searches for information
 - Makes appointment with PCP

Charlie considers his options

- Asks his primary care physician about additional treatment options; talks to family members, friends and coworkers.
- Turns to online research to gather additional information on different treatment options, surgical programs, and providers.
- Registers for and attends an information seminar.
- Seeks advice from his PCP about different specialists and programs
- Evaluates the reputation, rankings and ratings of different providers.

Narrowing treatment and provider choices

Buying Cycle	Marketing Goals	Key Words	Social Topics
Consideration	Differentiate brand and service offerings.	Treatment options for knee pain, surgical options for knee pain, benefit of joint replacement surgery, risks of joint replacement surgery, recovering from joint surgery	Options for treating knee pain, recommendations for providers & services, evaluations of experiences, living pain free



Actions:

- Reads about surgery options
- Registers for seminar
- Compares doctors & hospitals

Charlie chooses a provider

- Chooses a surgeon affiliated with a well-respected joint surgery program
- Makes an appointment; is evaluated by the physician and scheduled for surgery
- Doctor enrolls him in joint camp
- Want to know more about the surgery and talks to others who've been through it
- Continues to seek validation for his decision; wife and daughter actively search online; read MD reviews
- Brand promise upheld or lacking. Trust, comfort and healing are strengthened or diminished.

He meets the doctor; schedules the surgery.

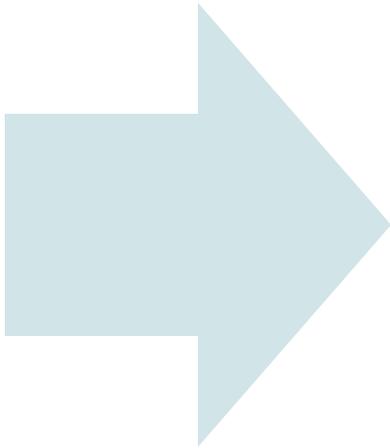
Buying Cycle	Marketing Goals	Key Words	Social Topics
<p>Selection</p> 	<p>Convert customer inquiry to appointment or purchase.</p>	<p>Orthopedic doctors in (city or region), knee replacement programs in (city), joint replacement experts in (city), minimally invasive procedures for knee replacement, joint replacement surgery at (name of hospital)</p>	<p>Experience with doctors and hospitals that do knee replacement, preparing for surgery, recovery time after surgery, latest in joint replacement care, what to expect with joint replacement surgery, etc.</p>

Actions:

- Has appointment with surgeon
- Schedules joint camp and surgery
- Seeks validation for decision

The trial phase: surgery and recovery

- Charlie comes through the surgery successfully
- He is pleasantly surprised at how quickly the rehab and healing processes begin
- He and his wife talk about the experience – what they liked, what could have been better
- Every interaction – pre-op activities, registration, nursing care, communications – influences their perceptions



Delivering a positive customer experience

Buying Cycle	Marketing Goals	Key Words	Social Topics
 <p>Trial</p>	<p>Deliver positive experience; stimulate repeat purchase.</p>	<p>Recovering from knee replacement surgery, going back to work after surgery, physical therapy, pain after surgery, follow up care after surgery</p>	<p>My experience with knee surgery, my experience with the hospital, doctors and of follow-up services, rating my doctor</p>

Actions:

- Participates in pre-op activities
- Has procedure
- Begins rehab

Charlie talks about his experience

- Charlie and his wife are pleased with the outcome of his joint replacement surgery.
- Now pain free, he is back to work and has resumed favorite family and leisure activities; Charlie feels revitalized and grateful for life after joint pain.
- Charlie and his family share the experience with others, and become advocates for his doctor and the hospital where he got his care.

Continued engagement builds brand loyalty

Buying Cycle	Marketing Goals	Key Words	Social Topics
Advocacy	Gain brand commitment and word of mouth endorsement.	Best doctors for knee surgery, patient experience with Dr. (name), ratings for hospital (name) or doctor (name), etc.	Recommending hospital or doctors, praising staff, sharing good experiences, life after surgery, back to normal, etc.

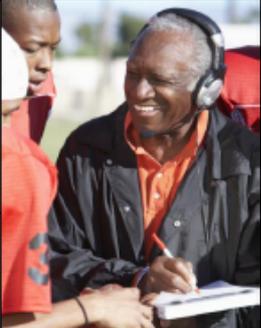


Actions:

- Returns to normal activity level
- Tells others about his experience
- Chooses the hospital for other services

Mapping the journey to tactics and content

Consumer Decision Journey – Joint Replacement

CONSUMER JOURNEY	Awareness	Consideration	Selection	Trial	Advocacy	TARGET
STAGE	Charlie is 61. He works full time as a high school coach. Charlie learned he had arthritis in his mid-50s when he saw a doctor about pain and stiffness in his joints. The pain, especially in his knees has grown increasingly worse. He's worried about keeping up with his players.	Charlie has taken pain relievers but can no longer manage the pain on his own. Several bouts of physical therapy haven't helped. His doctor tells him that this condition will require joint replacement surgery. Charlie searches for information about the surgery and learns about a seminar at a local hospital. His wife encourages him to go.	At the seminar, Charlie learns about surgery options, devices, risks and recovery. He decides to learn more about the doctors and hospitals in the area. He asks his PCP for advice. His daughter helped him search for information comparing doctors and hospitals. Charlie and his wife decide on a doctor and makes an appointment.	The orthopedic surgeon tells Charlie he is a good candidate for knee replacement surgery. After some additional tests and pre-op work, he attends the hospital's joint replacement camp where he learned what to expect, how to prepare for and how to recover after surgery. His surgery is successful.	After rehab, Charlie is living pain free and often tells his friends he should have done this much earlier. He's back to work and feels great about being active again. Charlie shares his story with others and doesn't hesitate to recommend the surgeon and the hospital. His wife praised the joint camp instructor on the hospital's Facebook page.	
ACTIONS	<ul style="list-style-type: none"> Searches for information Makes appointment with PCP 	<ul style="list-style-type: none"> Reads about surgery options Calls to register for seminar Attends the information session 	<ul style="list-style-type: none"> Compares doctors and hospitals Confers with PCP and friends Schedules appointment 	<ul style="list-style-type: none"> Sees orthopedic surgeon Participates in pre-op activities Has procedure and begins rehab 	<ul style="list-style-type: none"> Returns to normal activity level Tells others about his experience Chooses the hospital for other services 	
MARKETING GOAL	Activation	Engagement	Conversion	Closure	Delight	MEET CHARLIE
CONTENT	<ul style="list-style-type: none"> Orthopedic capabilities Causes of joint pain/disease Online risk/pain assessments 	<ul style="list-style-type: none"> Joint surgery expertise Orthopedic surgeons Joint surgery seminar Treatment videos Patient testimonials Social communities/blogs 	<ul style="list-style-type: none"> Orthopedic capabilities Rankings, designations, awards Treatment options and outcomes Patient testimonials/videos Information/videos about surgery Treatment options and outcomes 	<ul style="list-style-type: none"> POS promotions/information Take home collateral Surgery prep/recovery kit Related services promotions (rehabilitation, physical therapy, homecare, DME, etc.) 	<ul style="list-style-type: none"> Follow up call/thank you letter Return to fitness programs Related services promotions (PT, fitness center, ER/UCC, etc.) Ask for patient testimonial Prompt to write a review 	<p>PROFILE</p> <ul style="list-style-type: none"> Adult 50+ High school or college educated Osteoarthritis or former injury Living with pain/limited activity <p>DEFINITION OF QUALITY</p> <ul style="list-style-type: none"> Accessible and timely Surgical expertise/technology Positive outcomes & experience Listens and respects my decisions Prepares and supports me <p>CHOICE INFLUENCERS</p> <ul style="list-style-type: none"> Reputation of doctor & hospital Specialization in joint surgery Treatment & recovery options Living pain free & being active Recommended by PCP & others The experience I want
CHANNELS	<ul style="list-style-type: none"> Advertising CRM/direct mail SEO/SEM Web content 	<ul style="list-style-type: none"> Advertising/direct mail SEO/SEM/website content Physician search/rating sites Social communities/blogs Marketing events/seminars 	<ul style="list-style-type: none"> Advertising/direct mail SEO/SEM/website content Social communities/blogs Call center/registration Marketing events/seminars 	<ul style="list-style-type: none"> Physician office/staff Joint camp/pre-op environments Surgical care site/staff Rehabilitation sites/staff 	<ul style="list-style-type: none"> CRM/direct marketing SEO/SEM/web content Social media/blogs Follow-up calls/emails Marketing events/programs 	
TOUCHPOINTS STRATEGY	<ul style="list-style-type: none"> Stimulate demand Showcase expertise Be the 'go to' source for info 	<ul style="list-style-type: none"> Capture for information session Showcase providers & hospitals Proactive digital engagement 	<ul style="list-style-type: none"> Showcase expertise & outcomes Convert inquiries to appointments Proactive digital engagement 	<ul style="list-style-type: none"> Deliver superior experience Prepare for surgery & recovery Prompt rehab and post op care 	<ul style="list-style-type: none"> Proactive digital engagement Ask for testimonial/review Market additional services 	
CLOSING THE EXPERIENCE GAP	Activate awareness and interest in surgery as a treatment option. Provide searchable content and tools about joint surgery and orthopedic expertise.	Create a robust base of searchable content about orthopedic surgery and treatment options. Offer online or in classroom events to attract candidates for surgery.	Optimize online profiles for orthopedic surgeons and orthopedic programs. Initiate proactive digital engagement and convert to appointments.	Coordinate care across the pre-op, surgery and recovery continuum, and provide the services, information and support needed for optimal recovery.	Maintain engagement after the patient returns home. Begin with a follow-up call and thank you letter. Prompt to enroll/subscribe to news/social sites.	
OUTCOME	Increased awareness and interest in system's orthopedic services.	Increased preference for system's orthopedic doctors & services.	Selection of health system's surgeon and hospital.	Positive experience with providers and programs.	Praises and recommends provider to others; chooses provider again.	

How can journey mapping transform our approach to marketing?

Journey mapping improves marketing ROI

Voice of the Customer

Developing a deep understanding of consumer needs, pain points and decision processes better informs strategy, actions and marketing investments.

Customer Engagement

Engaging with consumers early in the decision journey and continuously throughout the journey drives conversion and builds brand loyalty.

Hardwire Acquisition

Capturing and converting consumers at the point of decision-making is critical to success; requires collaboration between marketing and operations.

Focus on Retention

Creating repeat customers and brand advocates drives share of market, share of spend and brand equity.

Journey mapping focuses marketers and providers on what matters most to customers

1

Delivers a clear, compelling value proposition at every influential touch point.

2

Articulates what matters, when it matters and why it matters to customers.

3

Reveals opportunities for service experience innovations.

4

Creates a seamless acquisition, care delivery and retention experience.

5

Brings marketing and operations into alignment to ensure consistent delivery.

6

Identifies the most relevant marketing and customer service metrics.

Questions. Comments. Discussion.

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