

Endeavor

LEVEL UP PHYSICIAN RELATIONS




an Endeavor Management company

OUR UNDERSTANDING

Looking to optimize physician marketing efforts to drive attributable volume quickly? Our approach will ensure physician marketing (1:many prospects) supercharges your business development/ outreach (1:1 existing relationships).

Our proven process serves to:

- Capture the team's vision and strategic priorities to define the marketing-led components of the physician strategy
- Ensure access and utilization of your Stratascan claims data
- Identify and deploy additional tools which may be necessary to level up your physician marketing (e.g., NPI, email append, etc.)
- Optimize your digital marketing tools to increase volumes, utilization and brand affinity; and identify potential ways to measure it
- Define additional workflow automation opportunities
- Assess current channels and tactics - individually and holistically - to develop an engaging digital ecosystem for physicians
- Support your physician marketing tactics from concepting to implementation



Grow referring volume by taking physician marketing to the next level.

ENGAGE TO DRIVE VOLUME

THE REFERRAL PIPELINE

LONG-TERM
PARTNERSHIP
AND ADVOCACY

NURTURE

ENRICH
RELATIONSHIPS

CREATE
ENGAGEMENT

BUILD
AWARENESS

REFERRAL FREQUENCY & TYPES,
PIPELINE CONVERSION AS WELL AS
IDENTIFYING THE TIPPING POINT OF
LOYALTY

REFER TO & PROMOTE THE BRAND

INTERACTION WITH BEST CONTENT,
CHANNEL, FREQUENCY, AND TIME

THE VALUE OF OPENS, VIEWS, AND LIKES

RETURN & REPEAT

PHYSICIAN ECOSYSTEM

- EFFECTIVELY ENGAGING THE REFERRING PHYSICIAN THROUGHOUT THEIR EXPERIENCE



MARKET INSIGHTS

Purchased lists, liaison visits, all payer claims data



PHYSICIAN FEEDBACK

Ad Hoc Online Surveys, Real-time feedback, Physician Advisory Board



PHYSICIAN MARKETING ACTIVITIES

Email campaign management, Event management



OUTREACH ACTIVITIES

Prospect management, visit tracking, reporting; expense tracking and routing, (Physician Liaisons / Sales Outreach), physician profiles



OPERATIONAL PROCESSES

EHR (EPIC) and physician portal tools (e.g., EpicCare Link), involved provider database



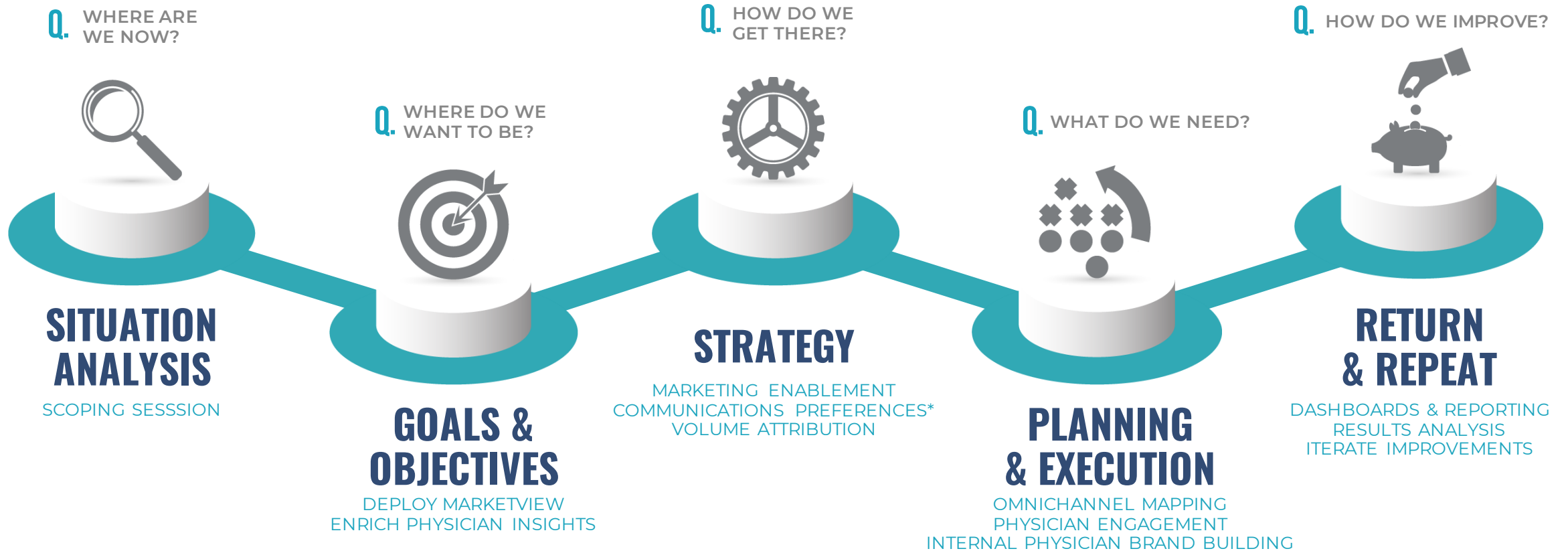
REPORTING

Google analytics, Google URL builder, Crimson reports, HealthGrades, Physician360 Dashboard

Our understanding is that you would like to deploy a series of fit-for-purpose tools which integrate with a common base platform (e.g., Salesforce.com). Your current toolkit is not comprehensive enough and does not currently integrate with other systems. Ideally, these elements would be integrated for real-time decision making at each of the engagement activities outlined above.

OUR APPROACH

HOW WE STRUCTURE OUR PROJECTS



BENEFITS OF OUR APPROACH

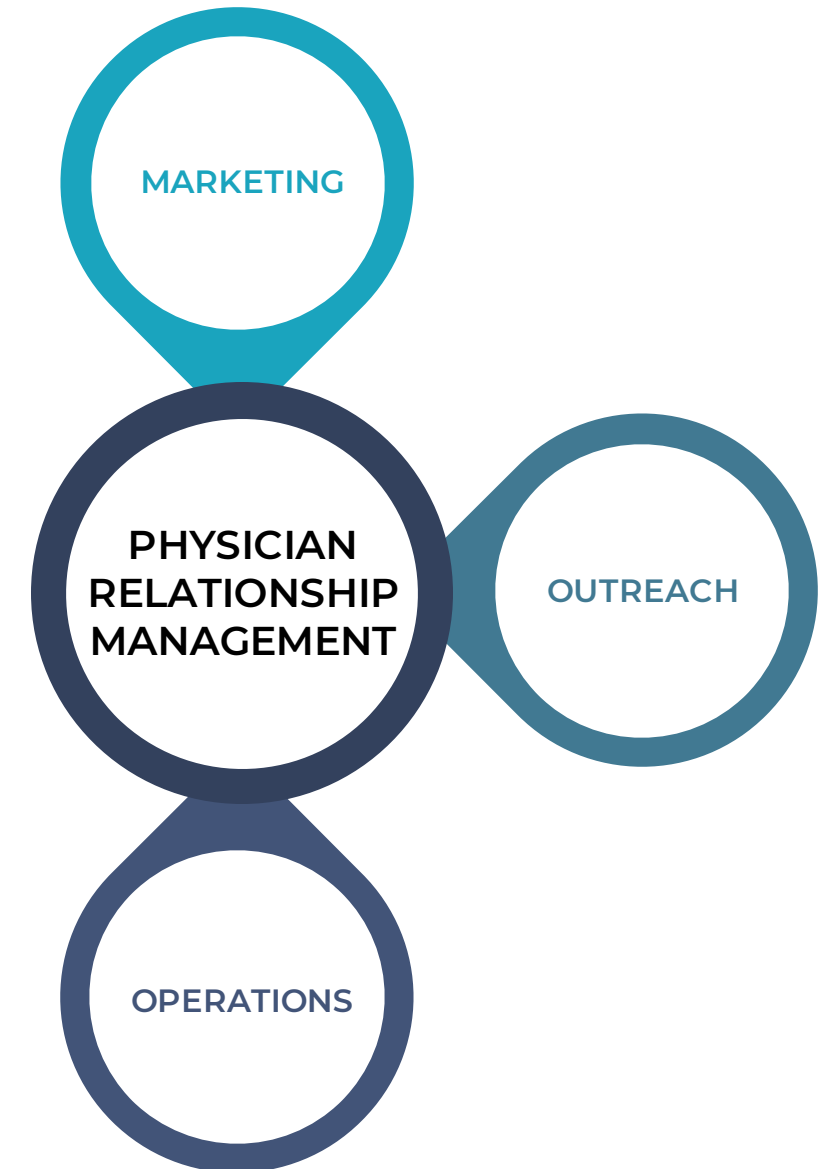
WHAT YOU CAN EXPECT FROM OUR WORK TOGETHER

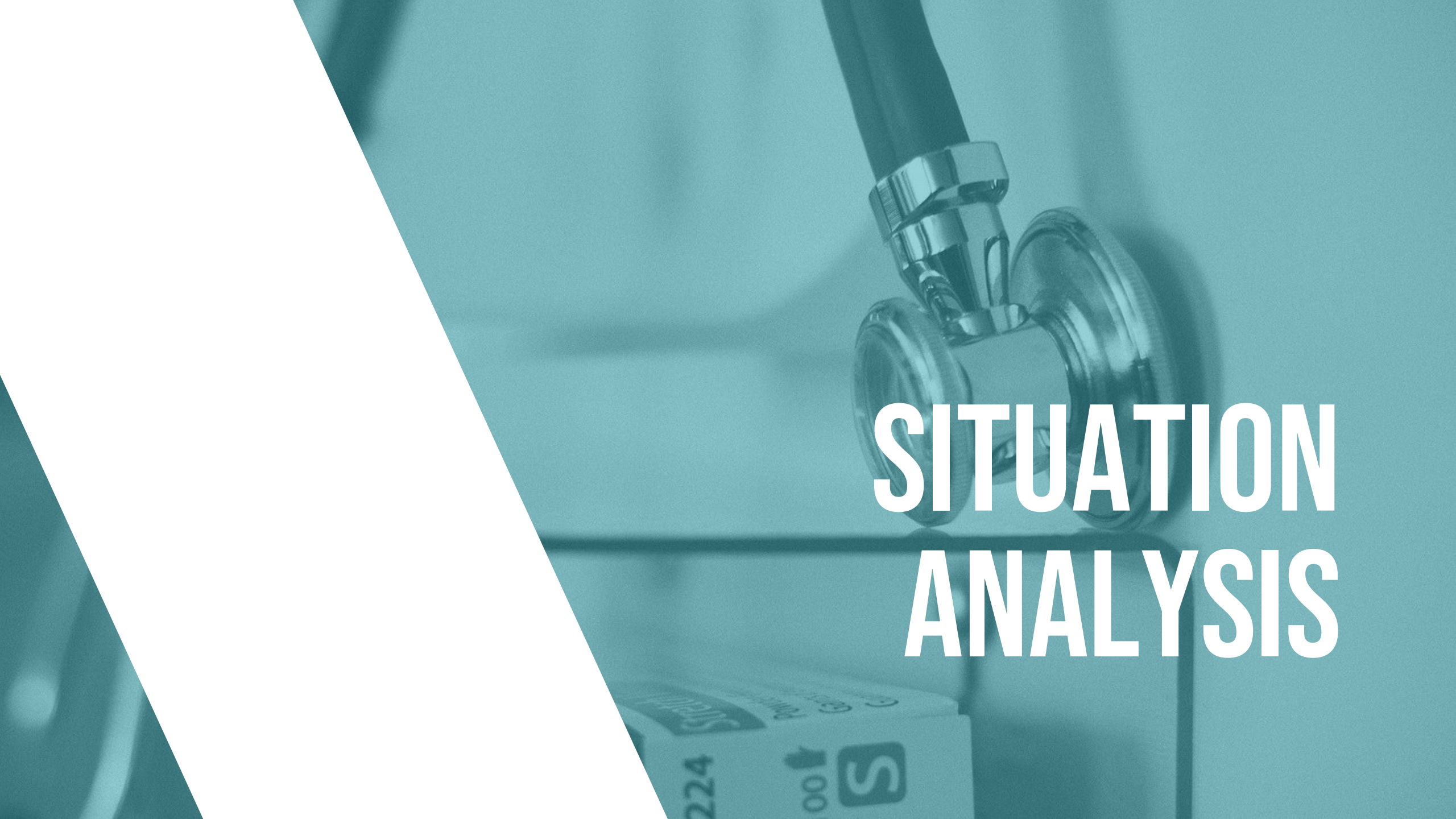
What should your Physician Relationship Management Technology Stack do?

- Bring together marketing and outreach activities more effectively
- Allow for precise targeting – both for 1:1 and 1:many interactions
- Facilitate a streamlined process from prospect to cultivation to referral
- Allow for stronger connections between your activities and business impact

Our involvement in this process uniquely meets the following needs:

- Owned / work for hire for your healthcare system
- Incorporates the specific needs of your marketing group, physician liaisons and other stakeholders
- Can scale to integrate disparate data (e.g., referrals from EHR, claims data from Stratasan)
- Augments your existing development team for well-defined scopes of work
- Has a significant developer resource pool to allow flexibility
- Can be scoped and phased to meet budgetary constraints

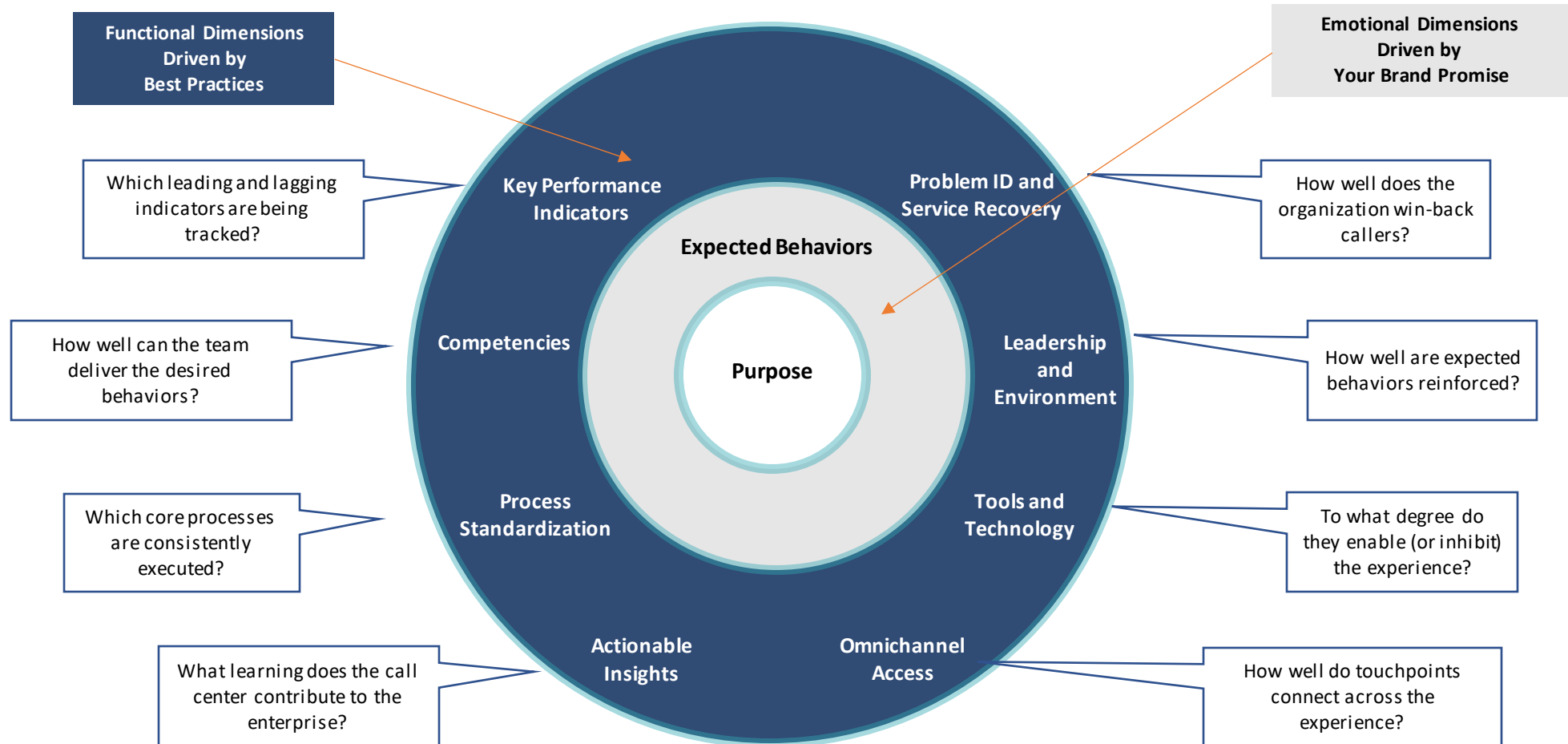


The background is a teal-colored image. On the left, there is a white diagonal shape. In the center-right, a stethoscope is visible, resting on a surface. Below it, a box of Sulfamethoxazole tablets is partially visible, showing the brand name 'Sulfamethoxazole' and the number '224'.

SITUATION ANALYSIS

WHERE WE'RE STARTING FROM

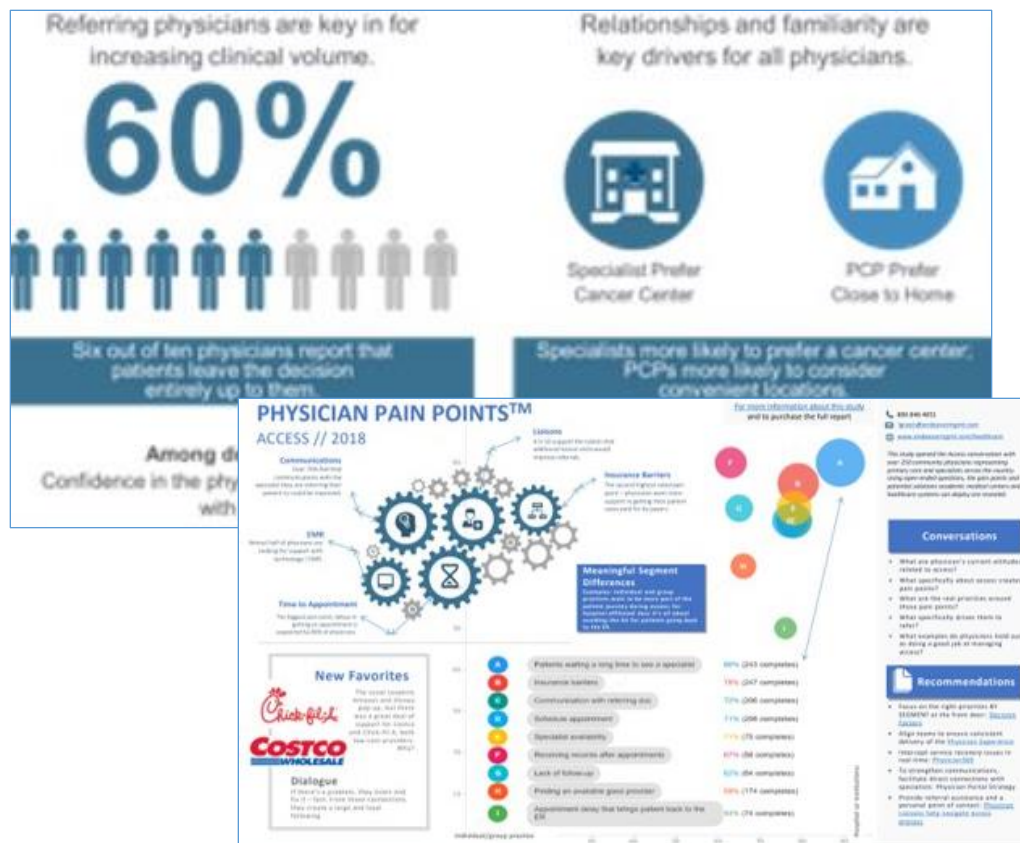
ASSESS PHYSICIAN RELATIONS CAPABILITIES AGAINST BEST PRACTICES



Through engaging your team and reviewing your plan documents, we will assess current practices to provide a roadmap into a best practice physician relations organization.

GET GROUNDED

UNDERSTAND THE REFERRAL DECISION FACTORS



Local Specialist
Known as experts in their field. Customers are both patients and primary-care physicians.

mutually beneficial

Needs

- Easily find a highly specialized physician
- Access to physicians with innovative techniques and technology
- Collaborative relationship
- Opportunities for professional growth and networking

My office staff will typically give the referral information directly to the patient. I am not sure if my patients let Cleveland Clinic know I referred them.

While I may not need to know every detail about the patient's treatment, I do need verification that the patient was accepted and a discharge summary for my files.

Due to my proximity, I often feel like I lose business to Cleveland Clinic. At times, Cleveland Clinic feels more like a competitor than a partner.

When determining where to refer a patient, I typically need to search for a physician or facility that has expertise in a very specific area.

MY GOALS ARE TO...

- Grow my practice.
- Service my current patients.
- Strengthen my reputation through excellent care for my patients.
- Build lasting relationships with Primary Care Physicians who refer to me.
- Partner with quality institutions to support me, my growth as a professional and provide second opinions when necessary.

I WANT...

- The ability to identify physicians based on expertise.
- Knowledge of technique/technology available.
- Knowledge of physician's reputation.
- My patients returned to me for care.
- To be updated on my patients' treatment.

"Every case I refer is complex. I need a physician at the top of their field with very specific expertise - distance to travel is insignificant."

Based on specialties and geographies defined together, we will design and execute a quantitative survey to understand decisions making factors and familiarity with your program(s). This foundational research will be helpful to identify potential referrer segments, USNWR impact, communications preferences, and how to grow volume.

DEFINE THE JOURNEY

CONNECTING THE OMNICHANNEL DOTS

STAGES

PREVENTION

DECISION MAKING

SCHEDULING

TREATMENT

MAINTENANCE

STEPS

Establishes
healthy
habit

Becomes
more health
engaged

Has health
Issues

Visits
website

Reviews
physician
profile

Confirms
with F&F

Calls
contact
center

Considers
appointment
options

Schedules
appointment

Call
Backs

Reschedules
appointment

Waits for
appointment

Receives
treatment

Gives
rating

Posts
review

Receives
newsletter
for healthy
campaign

CHANNELS

Internet



Mobile App



Email



SMS



Kiosk



Voice Assistant



Social Media



Digital Signage



Live Chat



Face-Face



- Persona A
- Persona B
- Persona C
- Persona D



SCOPING SESSIONS

CONTRAST WHAT'S POSSIBLE VS. **WHAT'S FEASIBLE**

We will organize discussions and document review as well as review existing workflows and strategic documents you have provided to accelerate and streamline our work moving forward. Depending on the comprehensiveness of your existing workflows, our involvement may vary moving forward.

We recommend including representatives from your physician marketing team, BD coordination team, BD leaders, and your SFDC programmers.

We will prioritize our work around physician marketing – what can be done to better exploit the insights from your claims data and the power of Salesforce.com.

We will document what's possible within the currently available CRM tools, time to deploy, internal resources and budget for licenses/external partners.

This will be a virtual session lasting 2-3 hours, with pre/post homework.

Deliverables Include

- Kick off and project alignment meeting (virtual)
- Information review (supplied by you in digital format)
- Prioritization of workflows (by category)
- Recommendation on platform and license levels (if needed)
- Data migration outline and budget (if needed)
- Feasibility – what's possible and when (e.g., use of our accelerators vs. custom programming)

A photograph of three healthcare professionals in an operating room, smiling and standing with their arms crossed. They are wearing blue scrubs, blue bouffant caps, and white surgical masks. The woman in the center is wearing white gloves. The background shows surgical equipment and a bright light source. A large white diagonal shape is on the left side of the image.

GOALS & OBJECTIVES

DEPLOY MARKETVIEW

DEVELOP TARGET MARKET INSIGHTS

SEARCH FOR PHYSICIANS

The screenshot shows the 'Doctors' search tab in the MarketView application. It features a sidebar with filters for 'Specialty' (set to 'Gastroenterology') and 'Lines of Business'. The main panel includes a search bar, a map of Texas with location pins, and a list of search results. A circular callout highlights the search filters and the map area.

DIVE DEEPER INTO PHYSICIAN ACTIVITIES

The screenshot displays the profile of Justin Michael Kane, MD, an Orthopedic Surgeon at 4700 Alliance Blvd, Plano, TX 75093. It shows a 'Show locations' button, 'Total Diagnoses Leading to Encounter' (876), NPI (1245466440), and a list of encounters. A circular callout highlights the encounter list, which includes '246 - Orthopedic Institute Of North Texas Pa' and '46 - Baylor Institute For Rehabilitation'.

IDENTIFY REFERRERS BY LOCATION

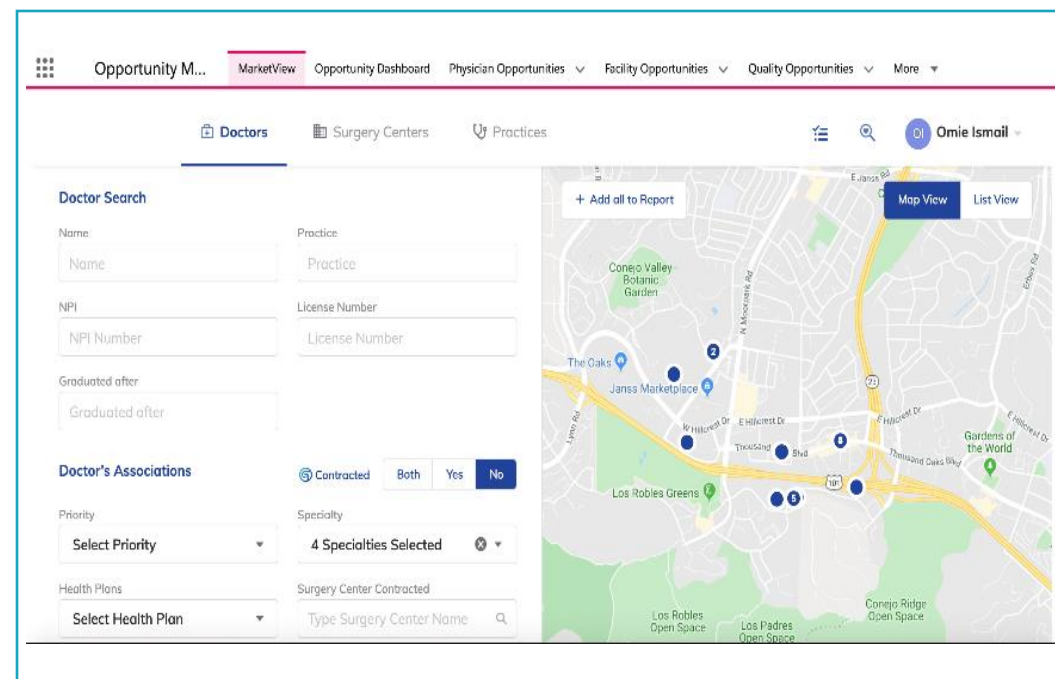
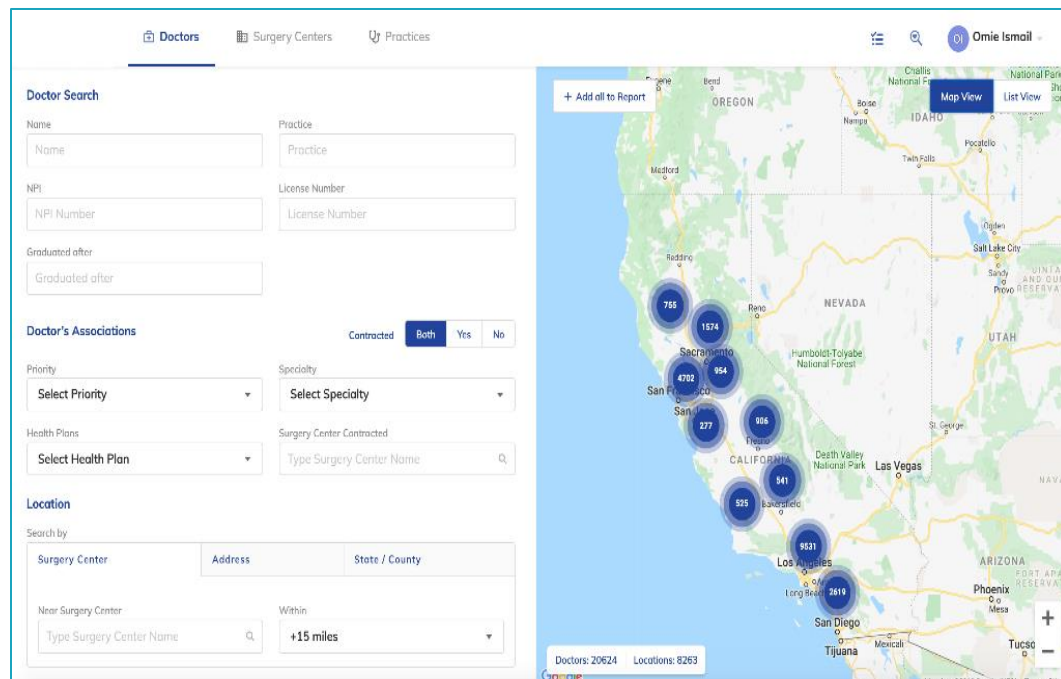
The screenshot shows the 'Map View' of the MarketView application, displaying a map of Texas with location pins for various physicians. A circular callout highlights a specific location pin for Justin Michael Kane, MD, and a list of top facilities: '246 - Orthopedic Institute Of North Texas Pa', '46 - Baylor Institute For Rehabilitation', and '44 - Exos - Athletics Performance Texas'.

CONVERT INTO CONTACT

The screenshot shows the 'Convert into Contact' interface, which lists encounters for Justin Michael Kane, MD. The list includes '14 - Medical City Plano', '7 - Integrity Home Health', '6 - Forest Park Medical Center Frisco', and '5 - North Texas Sarcoma'. A circular callout highlights the 'Create Contact in Salesforce' button and the 'Encounter data powered by Stratason' text.

ENRICH PHYSICIAN INSIGHTS

DEVELOP SEGMENTED MARKETING LISTS FOR SCORING



Using MarketView, we will work with you to identify key physicians, and develop a scoring system based on claims volumes. We will demonstrate how to utilize the tool and allow your team to perform scoring.

MARKETING ENABLEMENT

KEY TOOLS TO MAKE YOUR TASK EASIER



NPI APPEND

To clean up duplicates and ensure a good flow of new physician data, we recommend appending NPIs to all records. These are already present in Stratasan data but might not be accurate in your existing PRM or EHR. This is an iterative process which requires initial matches, your guidance, then additional matches until only a few exceptions remain for manual association or archiving by your team. This budget may vary if you choose to also utilize Group NPIs.

EMAIL APPEND



We will work with you to negotiate a favorable contract with email list append providers. These usually include an annual, unlimited lease. We recommend only procuring those for which you have an NPI, and you don't already have in your system

MASS EMAILING TOOL



Based on the outcome of the initial scoping session, it may become apparent that the use of a more robust 1:many email solution may be necessary. We've worked with clients to deploy tools such as Campaign Monitor.

CLEAN

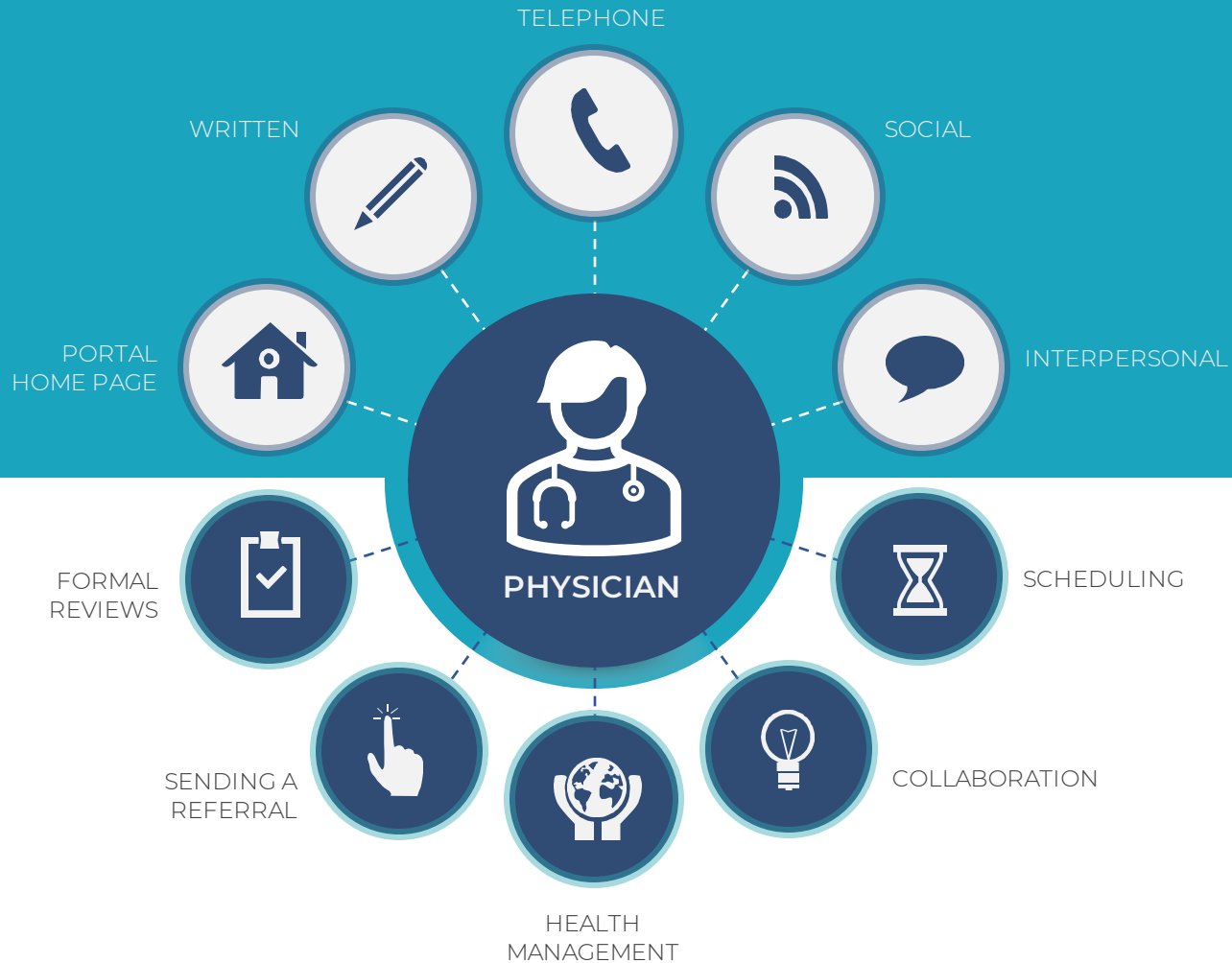


PRIORITIZE



USE

OMNICHANNEL MAPPING



WHERE

There's no shortage of channels for physician to engage healthcare organizations. The challenge is setting up the right kind of communications channels – based on their preferences.

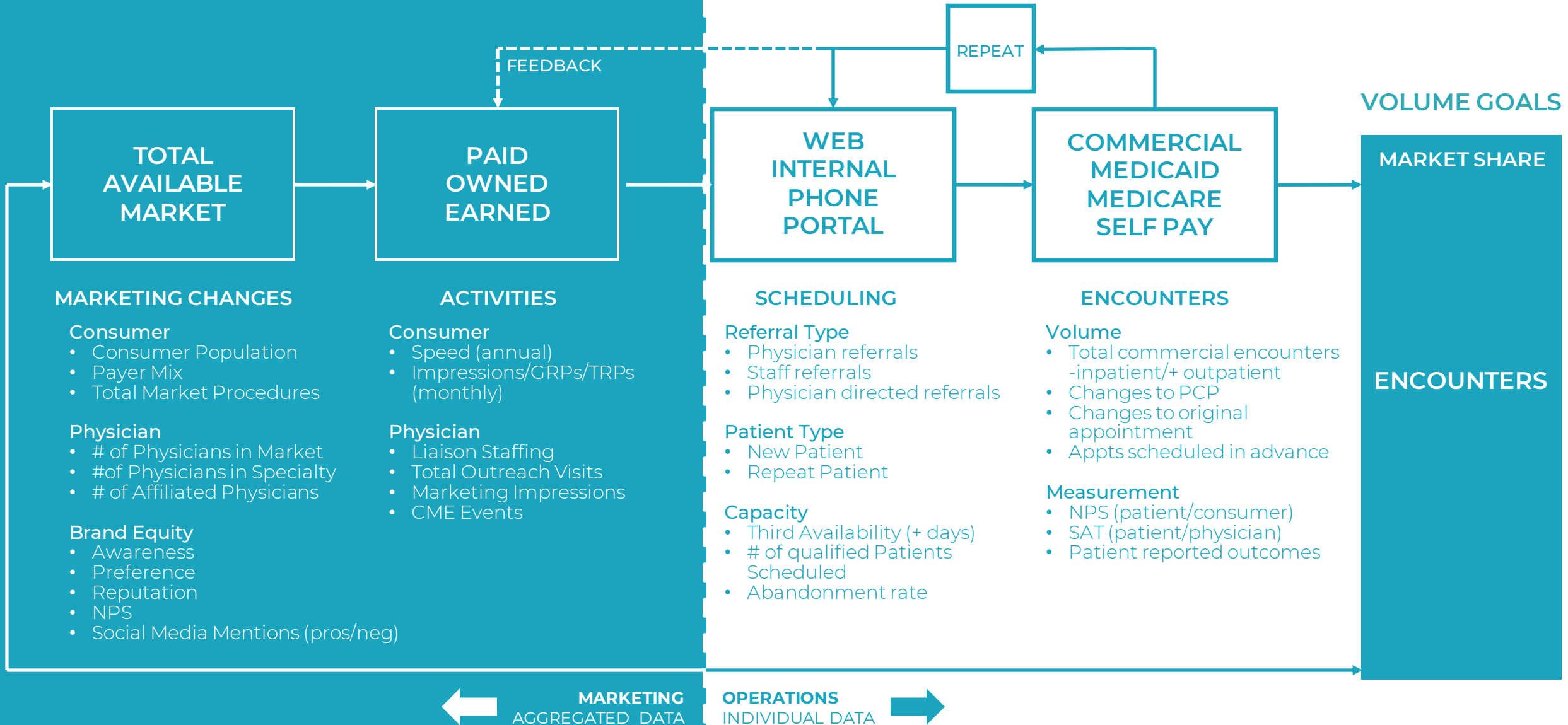
WHAT

Channels dictate the richness of what can be trended or acted on. Digital tools for communication are becoming more prevalent, but there's yet to be a one size fits all solution – which makes the integration of disparate channels more important.

More about omnichannel and the matrix: [Endeavor White paper](#)

VOLUME ATTRIBUTION

WHAT'S BEING DONE AND HOW WELL ARE WE CONTRIBUTING?



A smiling female doctor with long dark hair, wearing a white lab coat and a stethoscope, holds a black clipboard. She is standing in front of a large glass window with a grid pattern. The image has a teal overlay and a white diagonal shape on the left side.

PLANNING & EXECUTION

BUILDING FOR THE FUTURE

PLANT A FLAG IN FRONT OF YOUR FUTURE BUYERS

YOUNGER GENERATIONS (MILLENNIALS, GEN Z) WILL BE YOUR CUSTOMERS
SOONER THAN YOU THINK. THEY CONSUME MARKET MESSAGES
DIFFERENTLY AND ARE MOTIVATED BY DIFFERENT EMOTIONAL TRIGGERS.

SO, YOU NEED TO BUILD YOUR MARKETING MESSAGING FOR THEM NOW.

DESIGN YOUR COMMUNICATION STRATEGY AROUND WHAT'S COMING



MARKETING

AS A SERVICE

**WE DON'T JUST SUPPORT YOUR TEAM, WE'RE AN INTEGRAL PART
AND NATURAL EXTENSION OF YOUR INTERNAL CAPABILITIES**

OUR CREATIVE DIVISION, **RTRN**, OFFERS MARKETING AS A SERVICE (MAAS) DESIGNED TO SUPPORT INTERNAL MARKETING TEAMS ON AN AS-NEEDED BASIS. OUR STRATEGISTS, EXPERIENCE DESIGNERS, COPYWRITERS, GRAPHIC DESIGNERS, AND DEVELOPERS EXTEND YOUR OWN TEAM'S CAPABILITIES FOR BOTH LARGE PROJECTS AND SMALL. WHETHER IT IS A LAUNCH CAMPAIGN, LARGE ECOMMERCE DEVELOPMENT, EXPERIENTIAL DESIGN, CONTENT CREATION, OR JUST A POWERPOINT WE'RE READY TO HELP.

***WE CAN HANDLE ANY PROJECT FROM CONCEPT TO LAUNCH
OR PICK THE CAPABILITIES AND SKILLSETS YOU NEED,
AS AND WHEN YOU NEED THEM***



CREATIVE EXECUTION

DESIGN & EXECUTION

RTRN BLENDS SCIENTIFICALLY DERIVED INSIGHTS WITH CULTURE AND EMOTIVE DESIGN TO CREATE BEAUTIFUL EXPERIENCES. LIKE THE SCIENTIFIC HALF OF RTRN, THE CREATIVE COMPONENT IS PROCESS-DRIVEN AND ALWAYS DEVELOPED WITH THE OPTIMAL OUTCOME IN MIND.

- Campaign Development
- Branding
- SEO/SEM
- Web Development
- Influencer Marketing
- Experiential
- Corporate identity
- Branded Content
- Social & Digital
- Brand & User Experience Design
- AR/VR Experiences
- Affiliate, Retail, & Omni-Channel
- Print
- E-commerce

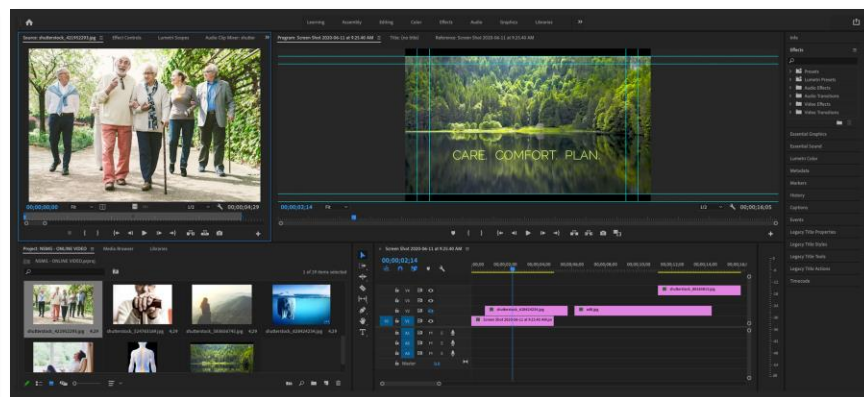
WHY WE WORK WELL TOGETHER

SCIENCE & CREATIVE
A PERFECT COMBINATION

ACCESS TO TOP CREATIVE TALENT

CREATIVE INNOVATORS

RTRN brings the best creative innovators to every project. Being creative at our heart ensures that we think outside the box and conceive new concepts, ideas, and tactics. As innovators we take high-level creative and develop it into functional tactics. Our creative teams includes interface designers, copywriters, producers, filmmakers, visual effects artists, game developers, graphic designers, and more.



NORTHSTAR MEMORIAL

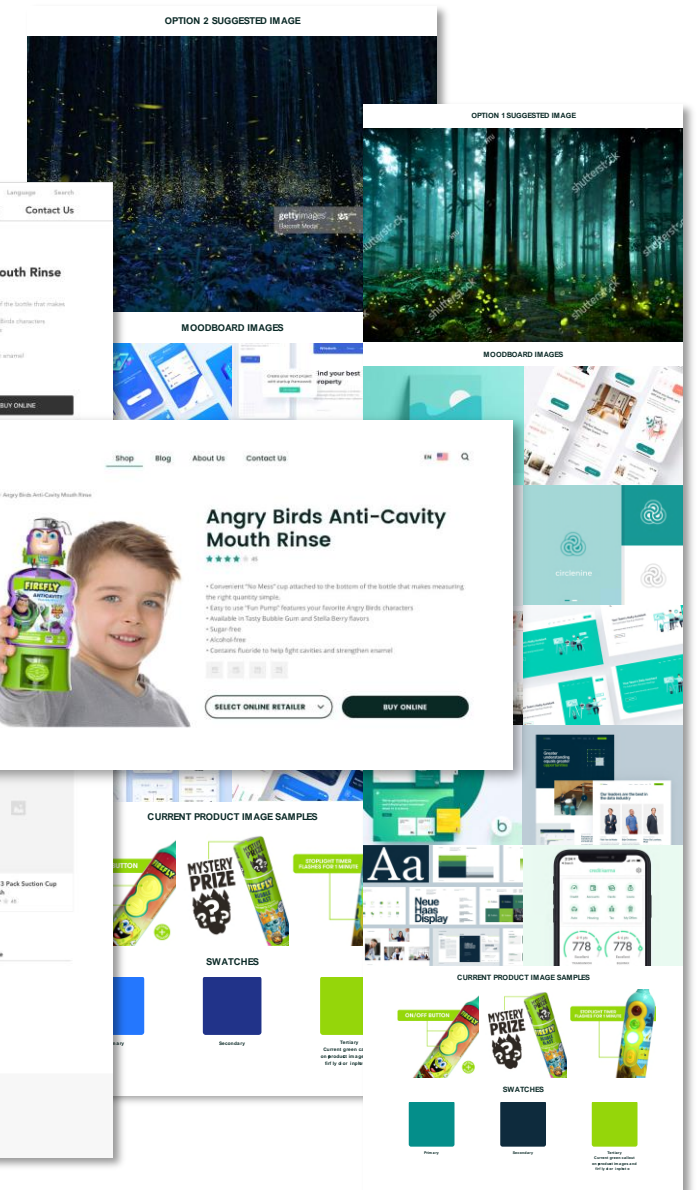
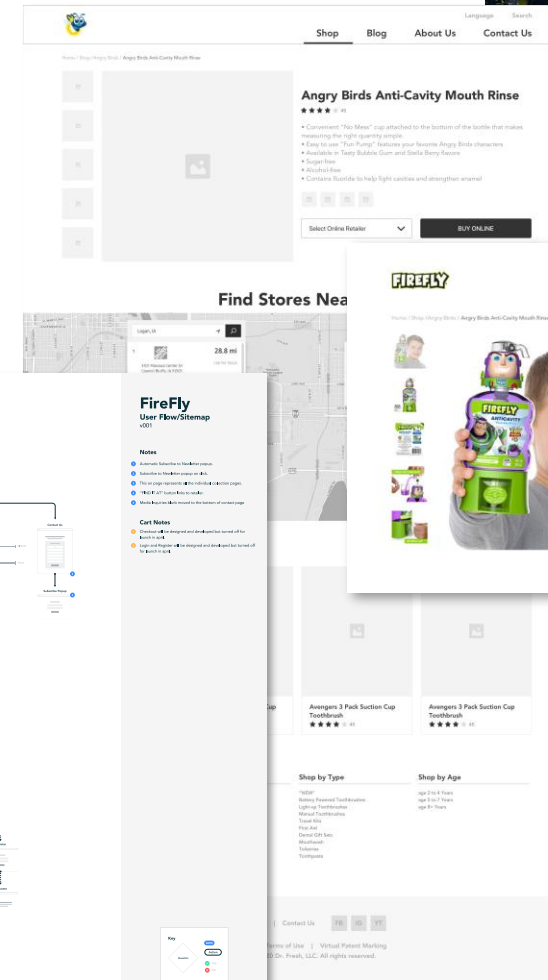
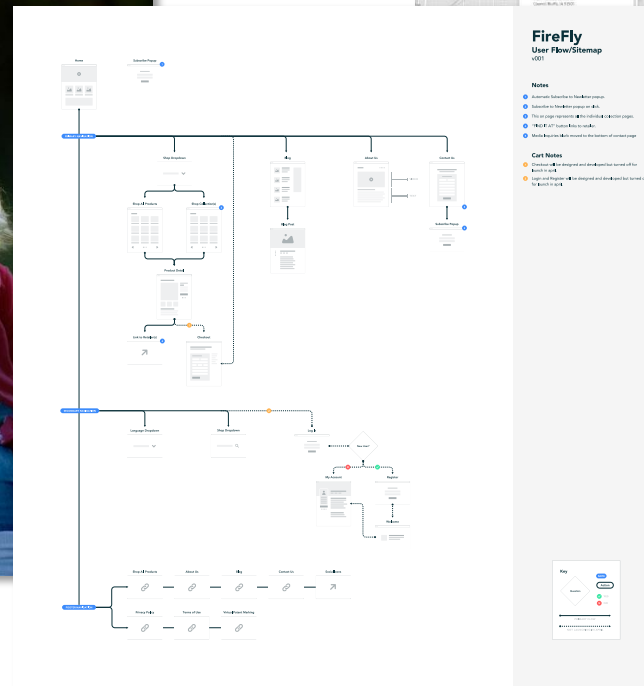
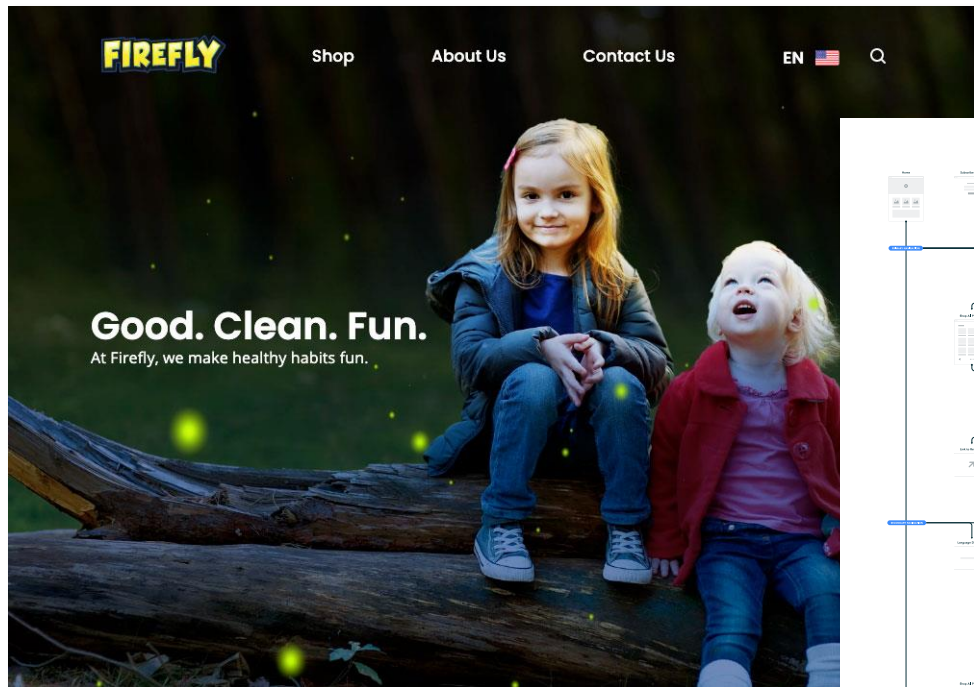
NorthStar's Guided Selling Tool helps salespeople walk through complex options in real-time with their prospects. Not only does the software allow for alternative flows based on location but tracks individual (micro) performance and compares it against company-wide (macro) benchmarks. Is one salesperson struggling with a package and therefore needs additional training and support or is it a systemic problem across all locations and the materials need to be reworked.

UTILITY NAVIGATION	PREPLANNING GUIDE
MAIN NAVIGATION	LOGIN
	NEW USER LOGIN
	RETURNING USER LOG IN
	INTRO
	BENEFITS OF PLANNING AHEAD
	CIRCLE OF PROTECTION
	CREMATION VS CASKET?
	FUNERAL SERVICES
	SIGNATURE SERVICES
	CEMETERY OPTIONS
	PACKAGES
	VETERANS SERVICES
	BEST
	BETTER
	GOOD
	SAFELY HOME
	ITEMIZED
	CEMETARY OPTIONS
	CASKET OR CREMATION
	ABOVE OR BELOW GROUND
	FUNERAL SERVICES
	OPENING & CLOSING
	OUTER BURIAL CONTAINER
	MEMORIALIZATION
	MATERIAL
	SINGLE OR SIDE BY SIDE
	SIZE
	CEMETERY PACKAGE
	SUMMARY
	NOTES
	ADD ADDITIONAL SERVICES
	EMAIL SUMMARY
	FINANCING & PAYMENT
	FINANCING
	PAYMENT
	FINANCING & PAYMENT SUMMARY
	SIGN DOCUMENTS
	PAYMENT AUTHORIZATION
	FINANCING TERMS & PAYMENT CONTRACT
	CEMETARY CONTRACT
	FUNERAL CONTRACT
	SAFELY HOME CONTRACT
	CONFIRMATION PAGE
	CANCELATION FORM
	RECEIPT/CONFIRM (TBD)

DEPLOY ENGAGEMENT PLATFORMS

FIREFLY TOOTHBRUSHES

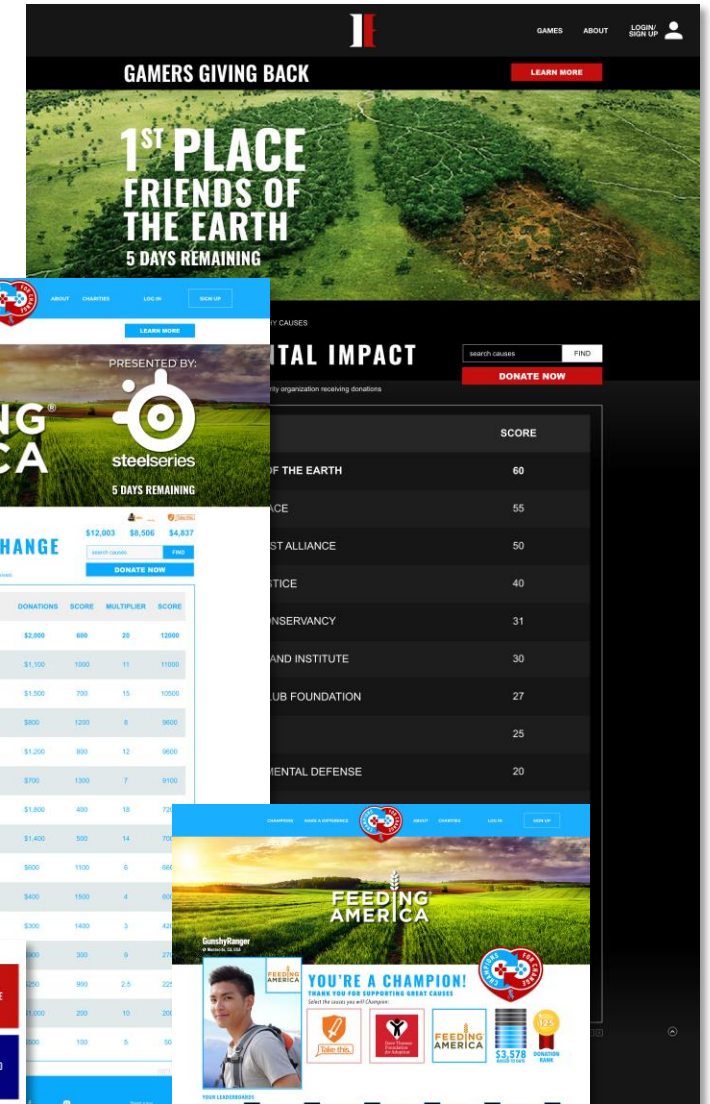
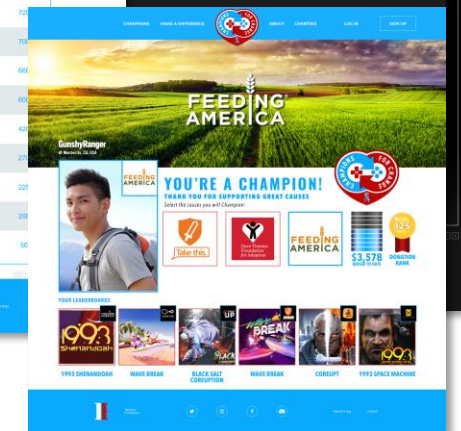
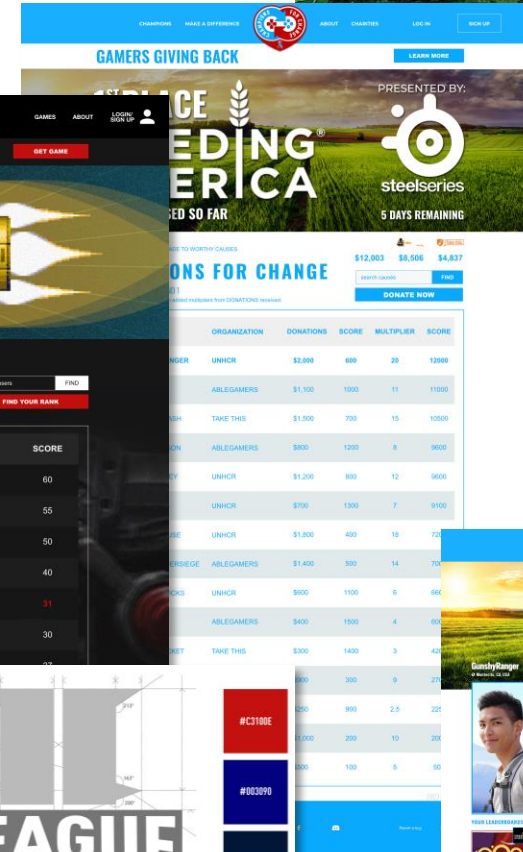
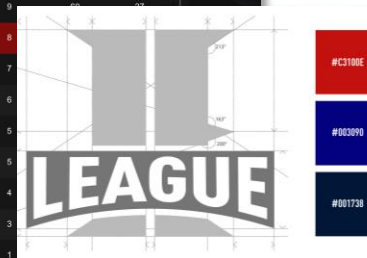
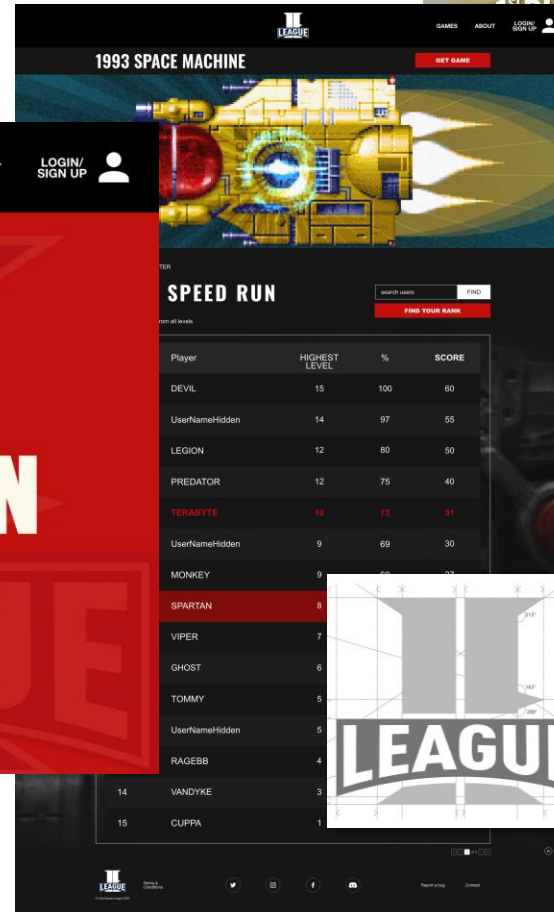
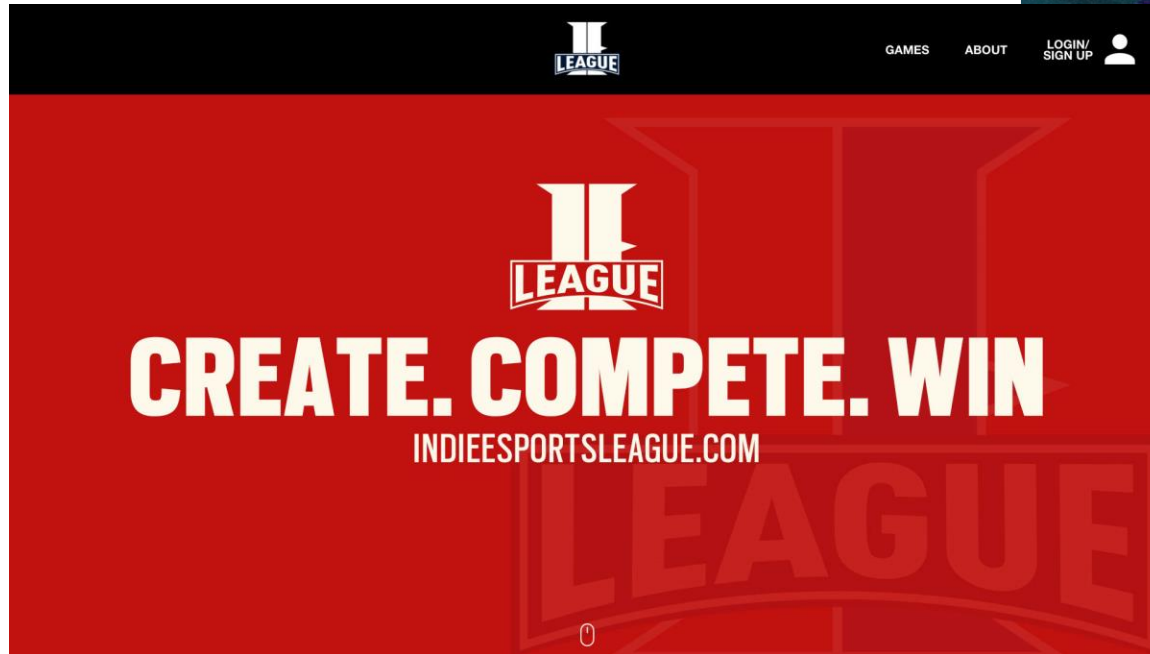
Illustrated the user flow/sitemap to meet business and user needs. Wireframed the website to incorporate new features, functions, and additional pages. Created a mood board to reflect the new light and aesthetically pleasing look and feel. Developed a design system while creating high-fidelity mockups and InVision prototype.



DEVELOP PASSIONATE COMMUNITIES

IEL & CHAMPIONS FOR CHANGE

Developed brand identity for new gaming platform including logo, mission, value proposition, strategic advantages. Designed UX/UI for website for consumer engagement and for developer league creation tools. Innovative marketing mechanics utilizing game creation and competition designed to be simple and intuitive to all audiences.



A healthcare professional, likely a nurse or doctor, is shown in a clinical setting. She is wearing blue scrubs, glasses, and has a stethoscope around her neck. She is looking down at a tablet computer she is holding. The background is a blurred hospital corridor with a railing. The image has a teal overlay, and a large white diagonal shape is on the left side.

**RETURN &
REPEAT**

DASHBOARD REPORTING

DASHBOARDS DRIVE BETTER SOLUTIONS



LISTEN CLOSER

Capture the Voice of the Customer across multiple touchpoints at the time of interaction, not when it's "survey month."



ANALYZE FASTER

Integrate data collected inside the organization with data gathered through discovery tools in a single platform. Compare data in real-time and dive into what's causing changes.



SOCIALIZE INSIGHTS BETTER

Develop key workflows and reports to share for decision making – both strategically and in-real-time for service recovery.

[RECORDED DEMO](#)



THANK YOU

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