



Marketing Role in CRM:
Nurturing Leads
Along the
Path to Care

Housekeeping



Audio is available through your computer speakers or through dial-in. All lines are muted.



You can submit questions/comments at any time. We will address all questions during the Q&A session at the end of today's presentation.



Links to the slides and recording will be made available and sent to all attendees via e-mail.

About Us

We work with nationally-recognized Institutions:

- 5 “Honor Roll” institutions
- 5 out of the top 10 cancer programs
- 3 out of the top 4 pediatric hospitals
- 3 out of the top 10 cardiovascular programs

National Benchmarking Studies:

- Patient experience management
- Marketing practices
- Physician relations programs
- International programs

Ranked as one of top 35 Healthcare Consulting firms
by Modern Healthcare



Agenda

3 Innovative Ideas

To help you build a foundation for 1:1 marketing

1

Lead Nurturing

Nurturing leads by integrating digital and traditional channels with email marketing

Quality Interactions

Maximizing quality interactions with leads from online and offline campaigns

Channel Switching

Stopping leaks when your leads switch channels

2

Customer Service on Social Channels

Tips for taking on Social customer service

5


Metrics that Matter

Demonstrating impact and effectiveness through lead tracking across channels

#1

Integrating **digital and
traditional channels with
email marketing**





Send me an email...
...and I'll ignore it
later.

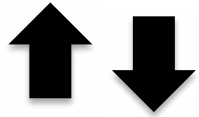
Content



Timing

= Relevance

Marketing



Making Appointments

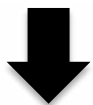
Asking a question

More Information

Find a Doctor

Make a Donation

Getting a Referral



Call Center



The image features two large, cylindrical metal grain silos with conical roofs, situated in a field of bright yellow flowers. The sky is clear blue with a few wispy clouds. A red rectangular box is overlaid on the left silo, containing the word "Marketing" in white text. A black plus sign is positioned between the two silos, and another red rectangular box is overlaid on the right silo, containing the words "Call Center" in white text.

Marketing

+

Call Center

A close-up photograph of a person's hands holding a black smartphone. The person is wearing a white shirt. The smartphone screen is lit up and shows a white interface with a blue header bar. In the background, a laptop is open, and its screen displays a document with text. The overall scene is brightly lit, suggesting an office or workspace environment.

Call to Action

Web

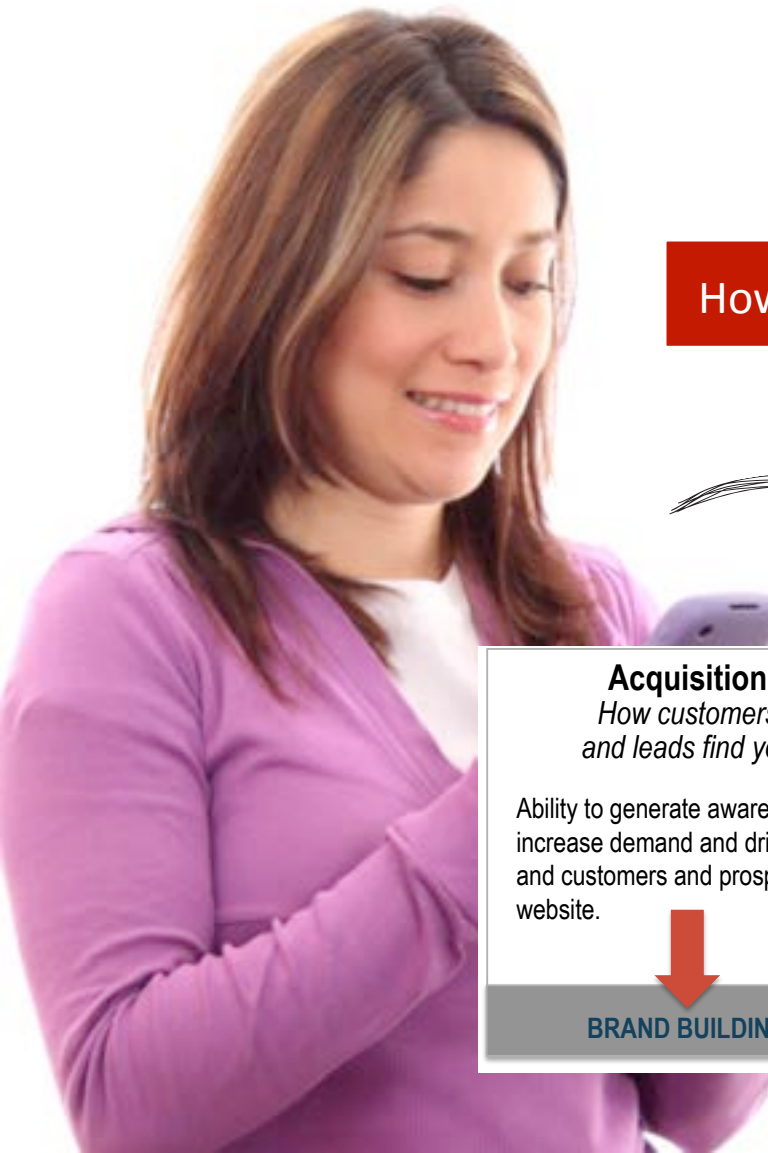
Phone

Mobile

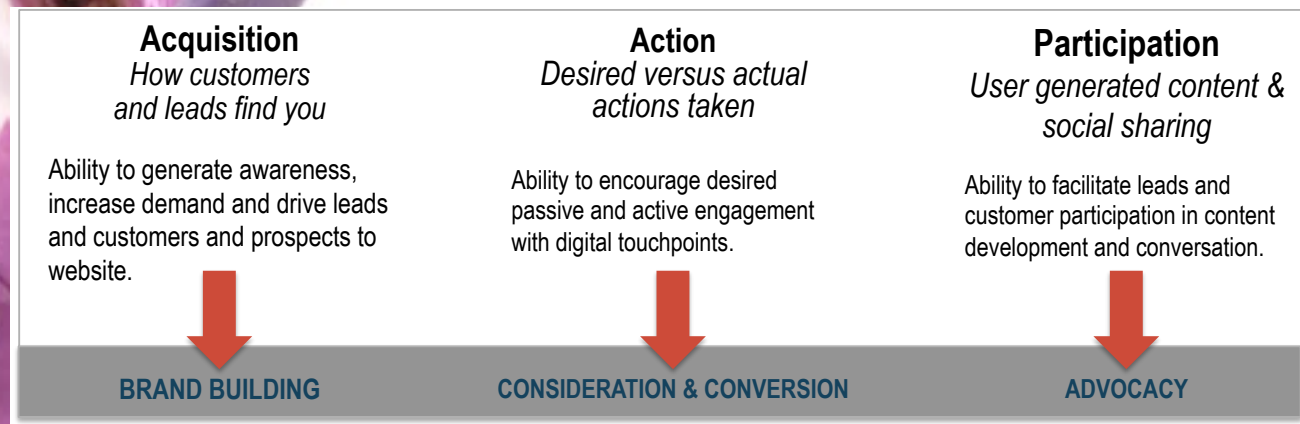
Text

Mail

Developing **Market & Customer Profiles for CRM**



How Do We Want to Engage?



Prioritize vs. Nurture

Let Digital Do the Work For You

Your CRM



Patient Profiles

Workflow Rules

- Automatically schedule field visits
- Send thank you and follow up emails
- Generate lapsed/at-risk notifications

Marketing Automation



Brand Building

#2

**CRM to capture leads lost
through **channel switching****





Channel Switchers



Customer Impact

Attention

Aggregated Impressions

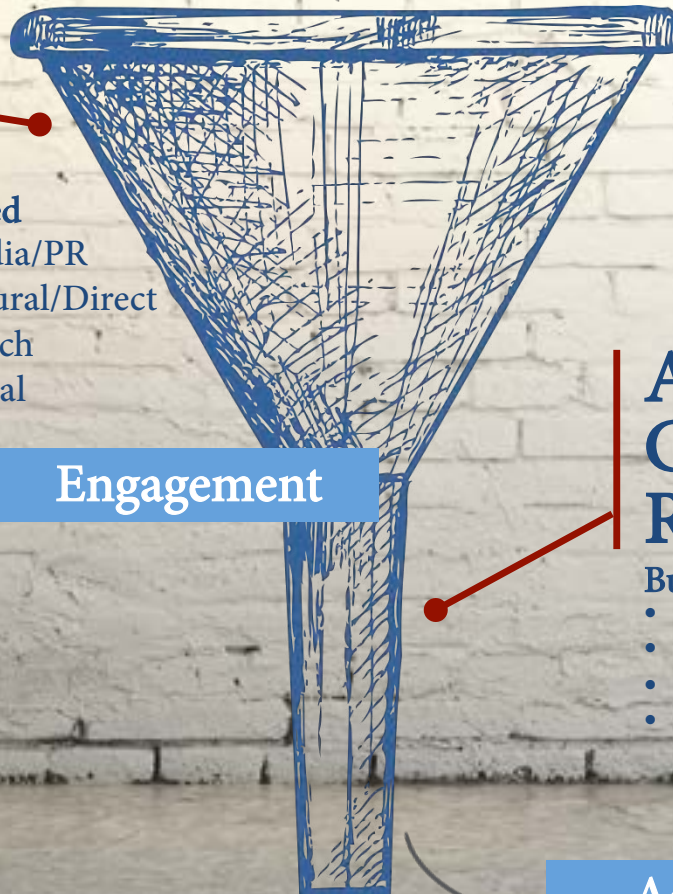
- | Owned | Paid | Earned |
|--|---|---|
| <ul style="list-style-type: none">• Web• Mobile• Social• Email• Events• Store | <ul style="list-style-type: none">• Advertising• Paid Search• Sponsorship | <ul style="list-style-type: none">• Media/PR• Natural/Direct Search• Social |

Engagement

Aggregated Conversion Rate

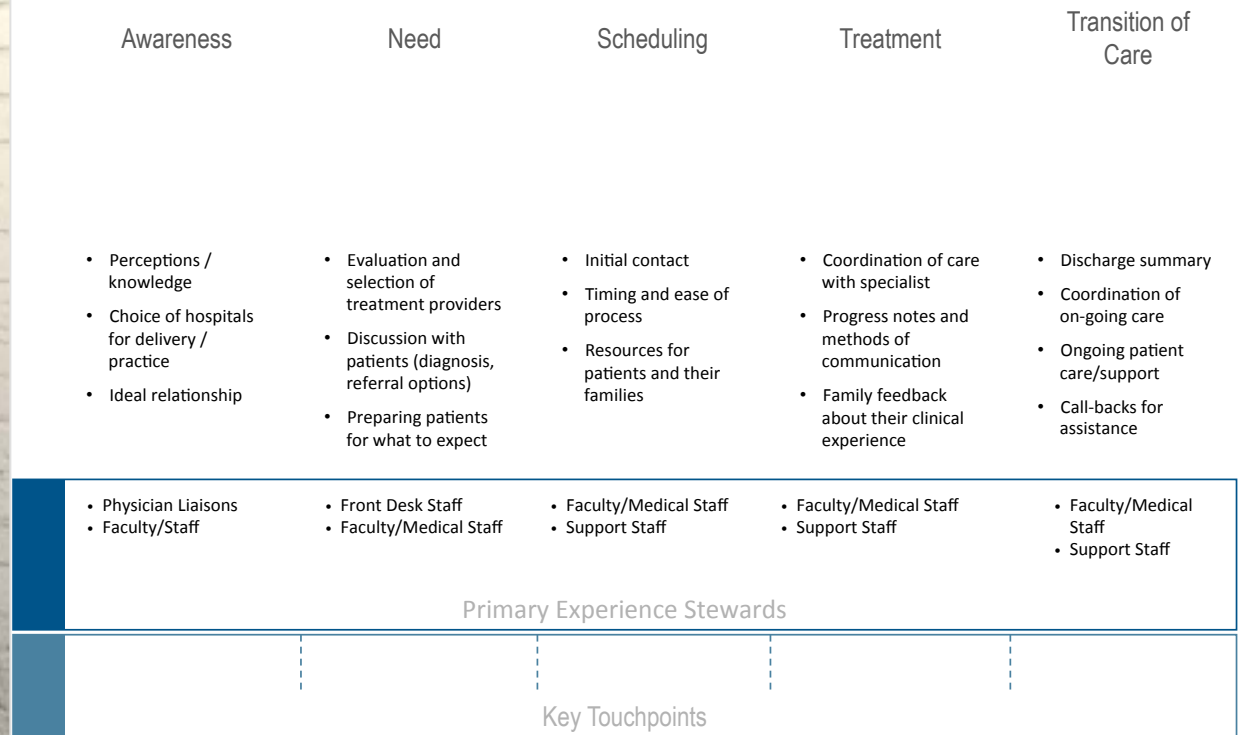
- Business Rules
- Marketing Qualified Lead
 - Qualified Patient
 - Arrived Patient
 - Customer Lifetime Value

Advocacy



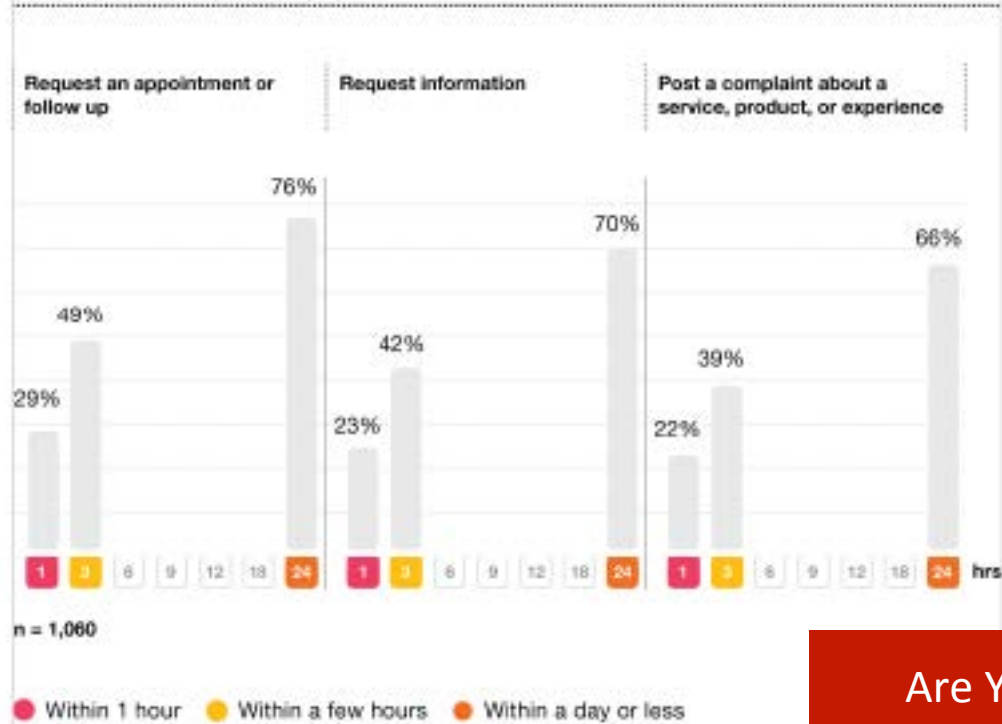
Customer Impact

Experience Map



Using **Social Media** to Provide Customer Service

Figure 6: Expectations for how quickly a healthcare company should respond when contacted through social media

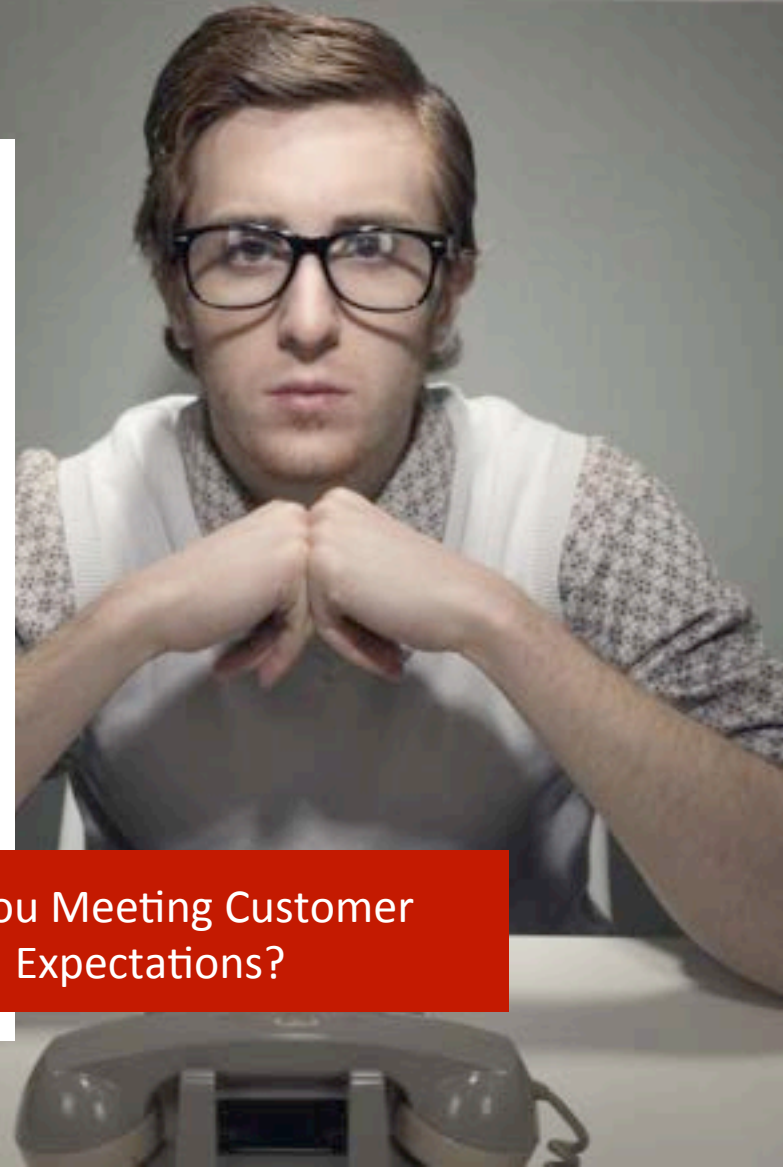


n = 1,060

● Within 1 hour ● Within a few hours ● Within a day or less

Source: PwC HPI Social Media Consumer Survey, 2012

Are You Meeting Customer Expectations?



Using **Social Media** to Provide Customer Service

Figure 8: Percentage of respondents finding value in services offered by healthcare providers via social media



n = 1,060

Source: PwC HRI Social Media Consumer Survey, 2012

Think Bigger than Issue Resolution

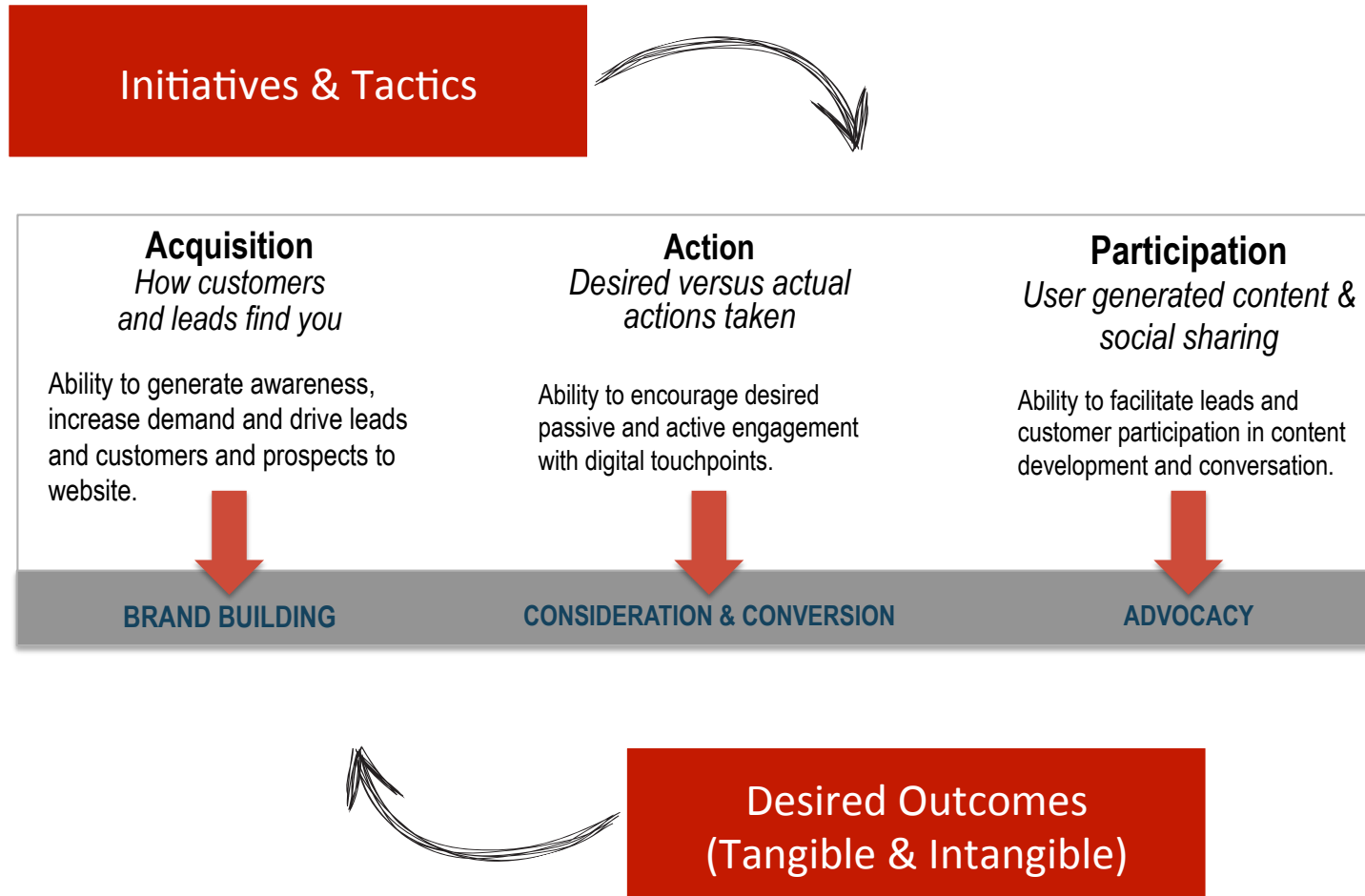
- Listen at Key Touchpoints
- Capture, Categorize and Prioritize
- Respond & Escalate (if needed)
- Integrate with CRM
- ANALYZE & IMPROVE

Measuring the Impact

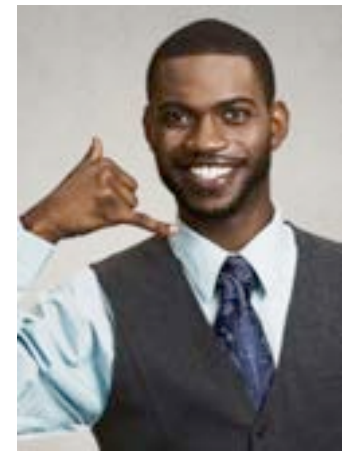
Selecting **Measures** and Metrics That Matter



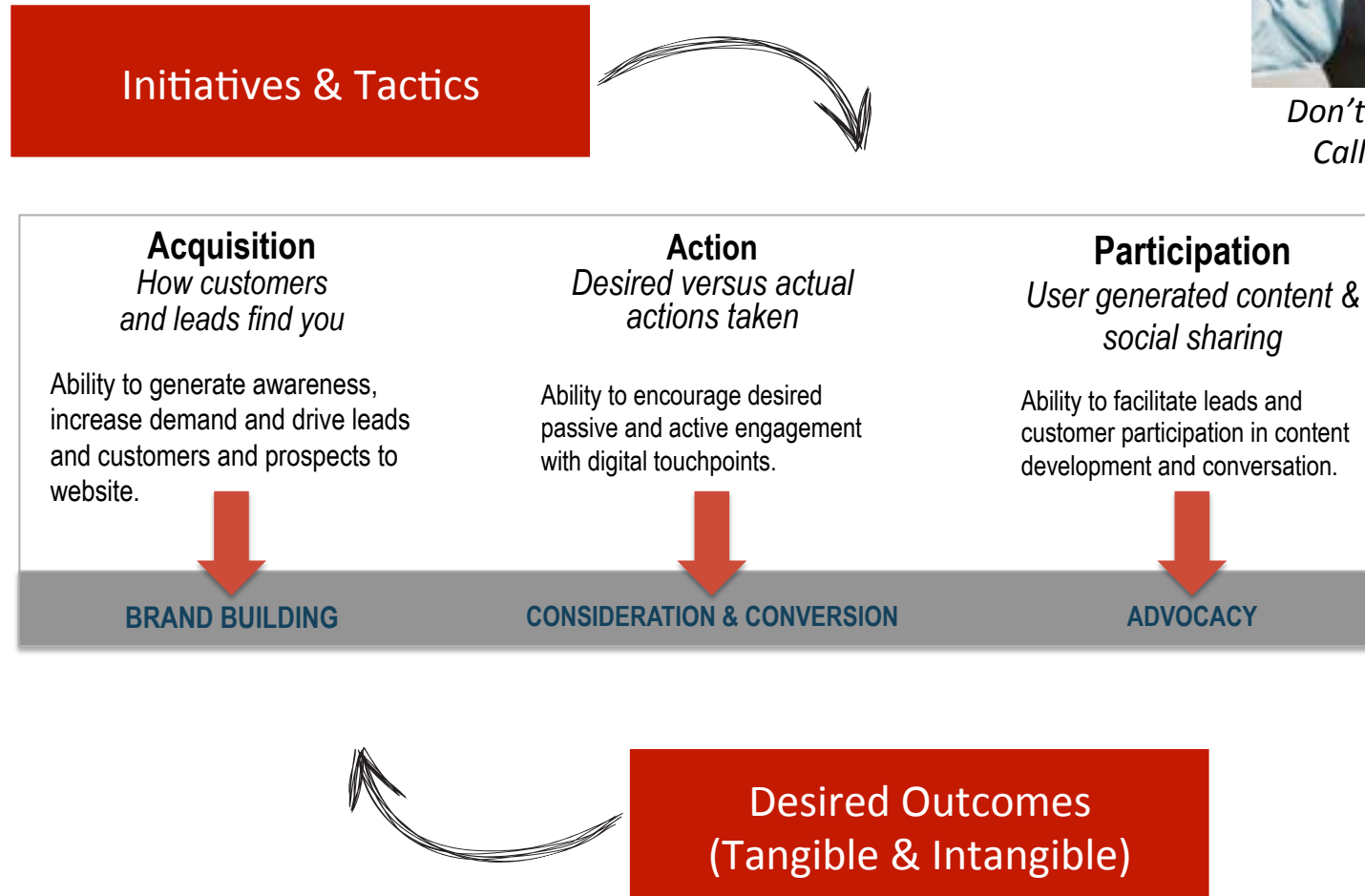
Selecting **Measures** and Metrics That Matter



Selecting **Measures** and Metrics That Matter



*Don't Forget Your
Call to Action!*



Picklists & Checkboxes!

Standardize Data For Ease of Reporting

Use standard options for tracking:

- Campaign Tactics Names
- Audience and Segments
- Dates/times
- Service Line Promoted
- Tagging Content/Messages



**Marketing
Activities**

**Voice of
the
Customer**



Digital Marketing Tools

Tools to Track Leads and Conversions

- Tracking codes
- Vanity URL
- Vanity Numbers
- Referring Physician App
- Invisible Transfer
- Calls to action
- Print Material
- Clickstream (views, downloads, UGC)
- Monitored Sessions
- Form Abandonment

#FreeParking

Print materials with unique codes to track patient leads.

Socialize Insights

Visually Rich Reports & Dashboards



Marry Your Data!

- Referrals AND Leads
- Quality of Relationship
- Advocacy
- Issue Resolution
- Analyze/Segment



Quick Start

Getting Started Today

- Maximize CRM and Email Marketing tools for use with both anonymous and customer data (ask us for our digital tool checklist)
- Use profiles to help you understand customer needs, preferences and expectations to target messages and communications. 100% know how your customers want to engage with you!
- Remember it's not just what you say, but what you do. Use voice of the customer and social media to help us understand and address customer pain points.
- Borrow out of industry tactics to engage with your customers in new and innovative ways- they are expecting it! (Ask us for our Campaign Planning Matrix)
- Tell a compelling story with your data by overlaying data sources and by using rich visual graphics



Shannon Frazier

www.endeavormgmt.com/healthcare

sfrazier@endeavormgmt.com

713-534-5570

Practice Lead, Digital Insights & Dashboards

Questions?

“The experience begins and ends outside the institutional walls. This is where expectations are set and advocacy (word of mouth) often takes place.”

- Gelb Consulting Group



2700 Post Oak Blvd., Suite 1400
Houston, TX 77056
+800 846-4051

info@gelbconsulting.com

www.endeavormgmt.com/healthcare

Endeavor Management is a management consulting firm that leads clients to achieve real value from their strategic transformational initiatives. We serve as a catalyst by providing the energy to maintain the dual perspective of running the business while changing the business through the application of key leadership principles and business strategy.

In 2012, Gelb Consulting became an Endeavor Management Company. Our combined experience (Gelb founded in 1965) offers clients unique capabilities to focus their strategic initiatives with a thorough understanding of customer needs to drive marketing strategies, build trusted brands, deliver exceptional customer experiences and launch new products. Our experienced consultants and analysts use advanced marketing research techniques to identify customer needs and spot high potential market opportunities.

The firm's 40 year heritage has produced a substantial portfolio of proven methodologies, enabling Endeavor consultants to deliver top-tier transformational strategies, operational excellence, organizational change management, leadership development and decision support. Endeavor's deep operational insight and broad industry experience enables our team to quickly understand the dynamics of client companies and markets.

Endeavor strives to collaborate effectively at all levels of the client organization to deliver targeted outcomes and achieve real results. Our collaborative approach also enables clients to build capabilities within their own organizations to sustain enduring relationships.