

Frictionless Physician Referrals



March 2025



Physicians make **countless**
micro-decisions
throughout their day.

Even **small inefficiencies** in
the referral process **can**
create problems.



Friction in Physician Referrals

Imbalance in Resources

Physician relations gets \$2 for every \$100 Marketing.

Technology Gap

Younger physicians are far more tech savvy than physician leaders.

No Access, No Conversion

Optimizing demand generation efforts against appointment access.

Breaks in the Chain

Leakage, and switching behaviors, even among your employed physicians.



Multi-faceted Nature of “Physician Relations”

- In consumer marketing, **sales**, **access/contact centers**, and **marketing** are integrated by design – the same should be true in healthcare B2B.
- Effective **Physician Relationship Management** requires **alignment of activities** and **integrate stakeholders** that are **impactful to referring physicians**.
- ***We transform your approach from executing tasks to delivering a frictionless, relationship-driven experience..***

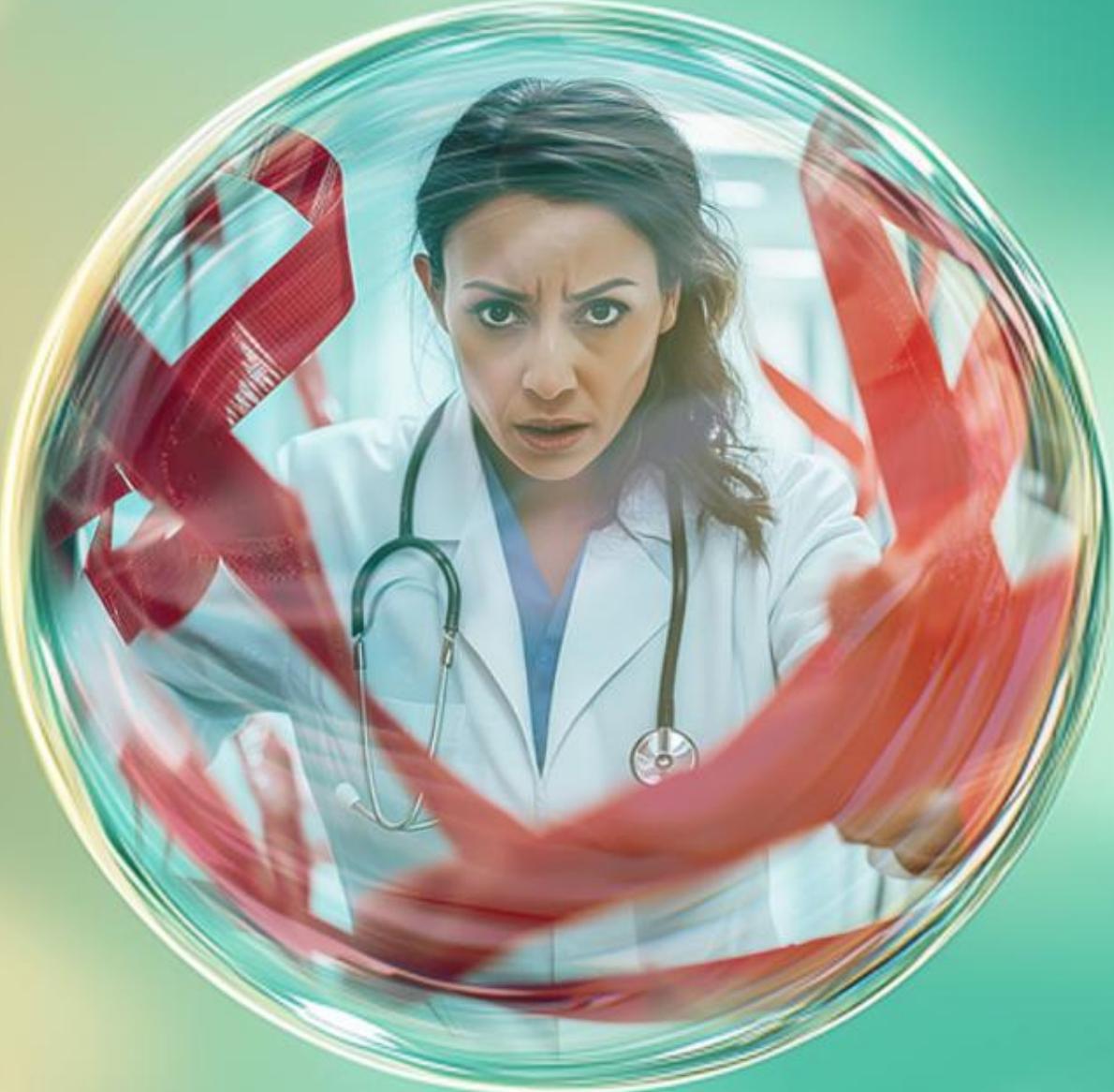


REDUCE REFERRAL FRICTION

Physicians make countless micro-decisions each day, and even small inefficiencies in the referral process can lead to frustration, delays, and missed opportunities for care.

By breaking the process into its smallest moments, we identify and remove friction – like unclear steps or administrative burdens – to create a seamless, intuitive experience.

This strengthens physician relationships and confidence and ensures more patients receive the specialized care they need, faster.



Where do you want to be?

Roadmap for Growth: Based on insights from the Envision phase and the outcomes of our alignment workshop, we create a roadmap for growth, categorized into **maturity horizons**:



Method to the Madness

We reduce the friction of Physician Referrals using our E4 consulting framework to design our program.

We specialize in physician research and engagement strategies designed to improve referral relationships, enhance communication, and drive sustainable growth.

Our structured, insight-driven approach ensures a deep understanding of physician decision-making, referral behaviors, and engagement preferences – leading to actionable strategies for long-term success.

Our process is structured into four key phases:



Envision

Engage

Energize

Enable

Envision: Break It Down to the Smallest Components

To reduce friction, we first need to recognize it – then envision what a seamless experience looks like. We contrast the expected process, what you deliver, with best practices – to expose bottlenecks, inconsistencies, and gaps in experience. By analyzing key layers, we uncover what's getting in the way of your growth and set a foundation to imagine smarter, smoother systems that bring the ideal experience to life.

Key Deliverables

Peer & Industry Best Practice Review Report

Comprehensive Research Report, including Physician Experience Map

Physician Relations Maturity Assessment & Internal Readiness Review Report

Envision: Break It Down to the Smallest Components

We begin with a deep-dive assessment to identify strengths to amplify and challenges to overcome. This typically includes secondary research, interviewing internal stakeholders and process owners, and eliciting feedback from your referrers.

Qualitative Physician Research	Competitive Review	Organizational Maturity Assessment	Market Opportunity	Alignment Workshop
In-depth virtual interviews with current and potential referrers to understand brand expectations, uncover key drivers and pain points, and understand how to enrich your relationship.	A thorough market and competitor analysis to understand competitive positioning and benchmark against industry best practices.	Evaluation of current operations using our 8-dimension scorecard, which will explore physician engagement, physician marketing, and referral operations / call center.	Analysis of current referral behavior, market potential, potential areas of geographic focus by connecting claims data to the individual referrer level.	A structured session to ensure leaders align on strategic priorities for referral optimization. Together, we create a concise one-pager summarizing the core physician engagement strategy, providing a clear, shared reference point for the working team.

Timing for Envision: 6-8 weeks

Engage: Removing the Points of Friction

With fresh insights in hand, we craft design to acknowledge your current state and build the path toward the future. These activities are aimed at engaging cross functional teams to ensure your experience is implemented with low friction internally as well. Through these exercises, friction turns into flow.

Key Deliverables

Purpose Placemat and Program Charter

Strategic Roadmap

Workstream Plans

Engage: Removing the Points of Friction

We develop and deploy core deliverables that arm your teams with tools to advance change. Below are a few of the workstreams that link to outreach, marketing, and operations efforts. Program management principles are used to ensure that this transformation doesn't stall; the changes should be as frictionless as the experience you're delivering.

Technology	Physician Targeting	Training & Change Management	Measurement & Feedback Loops
Improving digital tools for referral tracking, outreach automation, and PRM system enhancements.	Identifying high-priority referrers and segmenting outreach efforts based on behavioral insights.	Equipping internal teams and physician liaisons with engagement strategies, tools, and messaging frameworks.	Establishing KPIs to track referral growth, physician satisfaction, and the effectiveness of engagement efforts.

Energize: More Consistent Experience = Stronger Reputation

Your teams have been engaged in engineering the change, so there will be a lot of potential energy created. So, this phase is about activation – and building momentum. By streamlining communications, outreach, and engagement, we replace fragmented touchpoints with seamless, scalable systems. The result? Fewer missteps, stronger relationships, and a consistent experience physicians trust.

Key Deliverables

Physician Engagement Toolkit

Event Activation Package

AI-Driven Referral Campaigns

Messaging & Content Suite

Energize: More Consistent Experience = Stronger Reputation

Activation is about deploying high-impact engagement initiatives; activities to inspire, create excitement. Ultimately, you will become known as delivering the easiest, frictionless referral experience. And that, in turn, leads to personal advocacy – referrers sharing their experience with others.

Change Communications & Training	Physician Marketing Communications	Event Management	Personalized Outreach
Aligning internal teams on new processes, expectations, and engagement strategies through structured training, leadership alignment sessions, and physician liaison coaching.	Developing tailored messaging, educational content, and digital outreach strategies to keep physicians informed and engaged.	Hosting CME programs, physician roundtables, and networking events to strengthen relationships and reinforce the organization's position as a trusted referral destination.	Implementing segmented and AI-driven referral engagement campaigns based on referral history and physician preferences.

Enable: Perpetual Market Domination

Maintaining momentum and dominating the competition means keeping friction from reappearing. That's why we build tools, tech, and performance loops that continuously identify, reduce, and eliminate drag on your referral engine. With the right systems in place, growth becomes automatic.

Key Deliverables

Marketing & Engagement Playbook

Technology & PRM Enhancement Recommendations

Performance Dashboards

Enable: Perpetual Market Domination

To ensure continuous improvement, we leverage technology, data analytics, and sales enablement tools to drive long-term physician engagement:

PRM Upgrades & Digital Enhancements	KPI Tracking & Analytics	Sales Enablement Tools
<p>Enhancing Physician Relationship Management (PRM) systems with AI-powered segmentation, automated referral tracking, and predictive analytics.</p> <p>Integrating CRM and digital engagement tools to enable targeted, data-driven outreach</p>	<p>Implementing real-time dashboards to monitor referral performance, physician satisfaction, and competitive positioning.</p> <p>Establishing continuous feedback loops with referring physicians to refine engagement efforts over time.</p>	<p>Providing physician liaisons and business development teams with customized outreach materials, real-time referral insights, and engagement resources to strengthen referral pipelines.</p>

A Little Bit About Us

Referrals

1000's

physician interviews

\$75M

one year revenue increase



150K

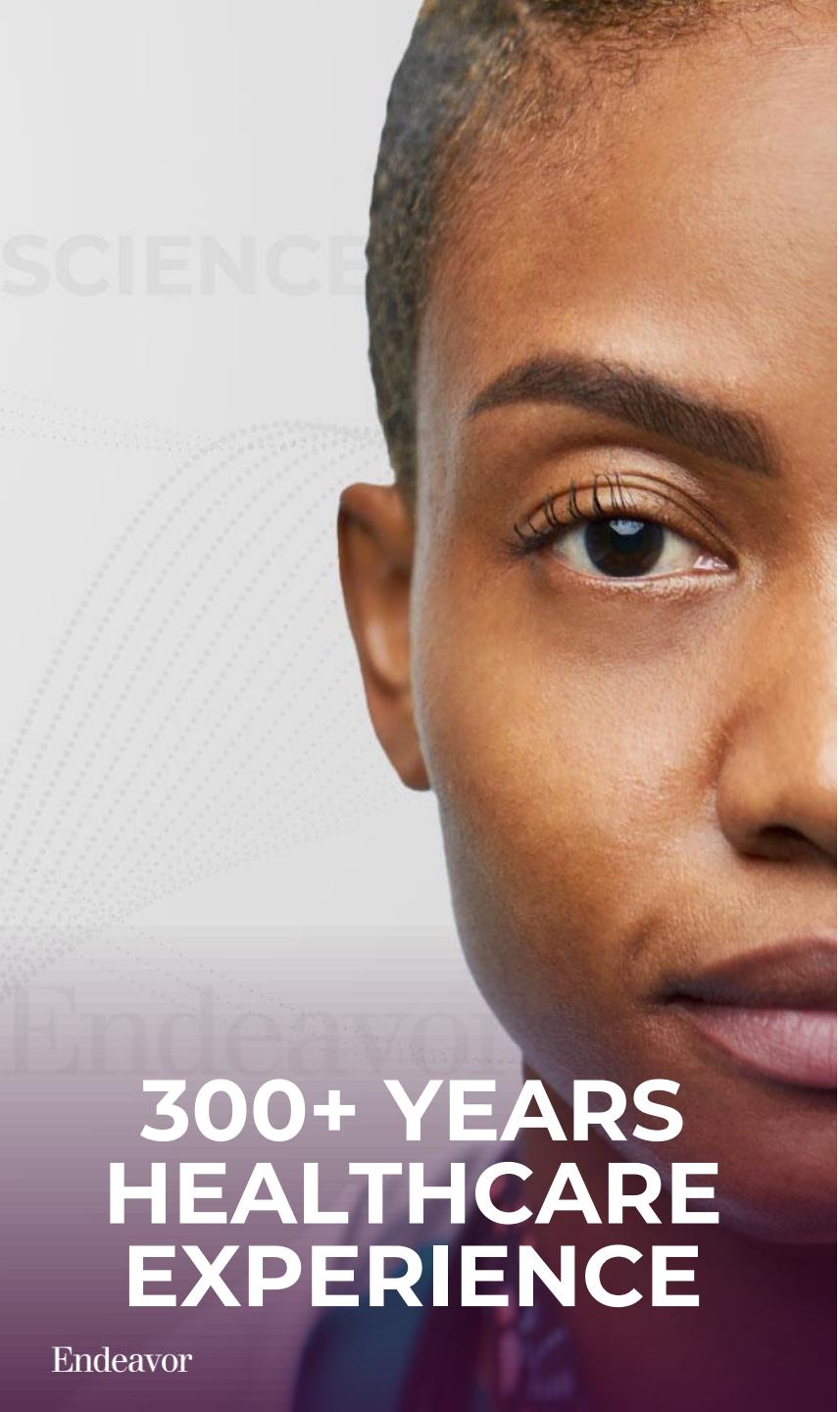
employees engaged



119MM

Media impressions





Endeavor

300+ YEARS
HEALTHCARE
EXPERIENCE

Endeavor Inside Industry Expertise

Our creative team is balanced by our **Executives in Residence**, a group of former **C-Suite leaders** and **decision-makers** in healthcare **marketing, communications** and **philanthropy**.

We understand the unique voice of academic health science centers. And we know how to powerfully and creatively engage your audience because **we have been in your shoes** at **dozens of healthcare organizations** across the country.



THE UNIVERSITY OF TEXAS
MD Anderson
Cancer Center

JOHNS HOPKINS
UNIVERSITY

UHealth
UNIVERSITY OF MIAMI HEALTH SYSTEM



Ochsner



Intermountain
Health

Beth Israel Lahey Health
Beth Israel Deaconess Medical Center

U SCHOOL OF
MEDICINE
UNIVERSITY OF UTAH

RTN



Outside Industry Expertise

Our **Award-Winning Creatives** have worked with some of the most iconic brands in **energy, fashion, technology, automotive, and gaming**.

Ever hear of a little game called **Fortnite**?

We use our **strategic thinking** and **powerful insights** to **design, develop, and produce campaigns, branded activations and content** across all media channels.



Template Examples

FUTURE OPERATING MODEL

REACH higher levels of operational excellence to drive growth

WORKSTREAM	PHASE ONE STOPPING THE DAMAGE	PHASE TWO EXPANDING OUR INFLUENCE	PHASE THREE LEVELING UP
HIGH-PERFORMING TEAMS	Engage the team in refining the vision for their desired future state. This includes culture, process, performance, workload, overlap of duties, training and cross-training, needs, gaps, support, and opportunities to leverage their talents more effectively. Measure resilience and create action plans to address burnout. Nurture team culture with role clarity, shared purpose, and workload balance. Consider joint enrichment event.	Cultivate growth mindset. Reinforce “growth” through Growth Meetings (how we collaborate) and Growth Teams (how we organize cross functionally). Configure team to encourage collaboration across the marketing team and with other related functions (IT, operations, HR, leadership, etc.). Streamline activities with more specified roles and approval processes.	Ensure teams can self-organize around initiatives. Define a clear career path to increase job satisfaction and retention. The experience working on the team attracts marketers to seek employment on this team. Establish dedicated tactical marketing audience champions (e.g., referring physicians).
DATA-DRIVEN MARKETING STRATEGY	Use data and outcomes to prioritize work and measure success. Integrate a strategic consumer approach to marketing for targeted areas. Design and deploy dashboard to overlay disparate data. Establish clear alignment of marketing performance to business outcomes.	Develop a strategic approach to marketing using consumer insights and business outcomes as key drivers of KPIs and success. Link KPIs to revenue and business outcomes through stronger linkages among data sources for causality.	Processes in place to continuously gather, analyze, gain insight, and prioritize consumer needs. Clear KPIs tied to business outcomes. CRM deployment.
EFFICIENT PROCESSES	Align on an approach to project prioritization (new projects to manage workload, and daily prioritization to manage workflow). Fully utilize Wrike to improve implementation tracking, content development, deliverables, and deployment and KPIs. Integrate KPIs and business outcomes to evaluate performance. Make duties, checks and balances, and workflow clear. Leverage Wrike, content calendar, creative briefs, work sheets, etc. Establish transparent accountability among teams.	Deploy a program management discipline that provides oversight over multiple projects to ensure efficiency and effectiveness based on KPIs and business objectives.	Work with content marketers, leaders, and related functions to adopt processes and continuously improve them as needed.
EFFECTIVE RESOURCING	Provide clarity around what's done in-house vs. through vendors. Consolidate vendors to the critical few and avoid overlap of duties.	Engage vendors to strategically address all channels and audiences, regardless of their area of focus. Business outcomes are reported, not just digital marketing channel efficiency.	Long-term vendor partnerships established; knowledge transfer takes place.
EXPERIENCE IMPROVEMENTS (DIGITAL AND OPERATIONAL)	Prioritize experience for all market segments, including consumers (external), employee (internal), physicians. Reinforce the growing importance of the <u>digital</u> experience for all journeys inside and outside organization. Partner with operational leaders to identify opportunities to connect marketing throughout the audience journeys. Establish a vision for your digital strategy.	Develop processes to connect marketing and communications channels throughout the audience journey. Develop shared digital services model integrating internal comms, Fox Chase, and business development.	Connect consumer and referrer patient journey to CRM tools. Ensure all audiences are engaged through channels and at times that matter most.

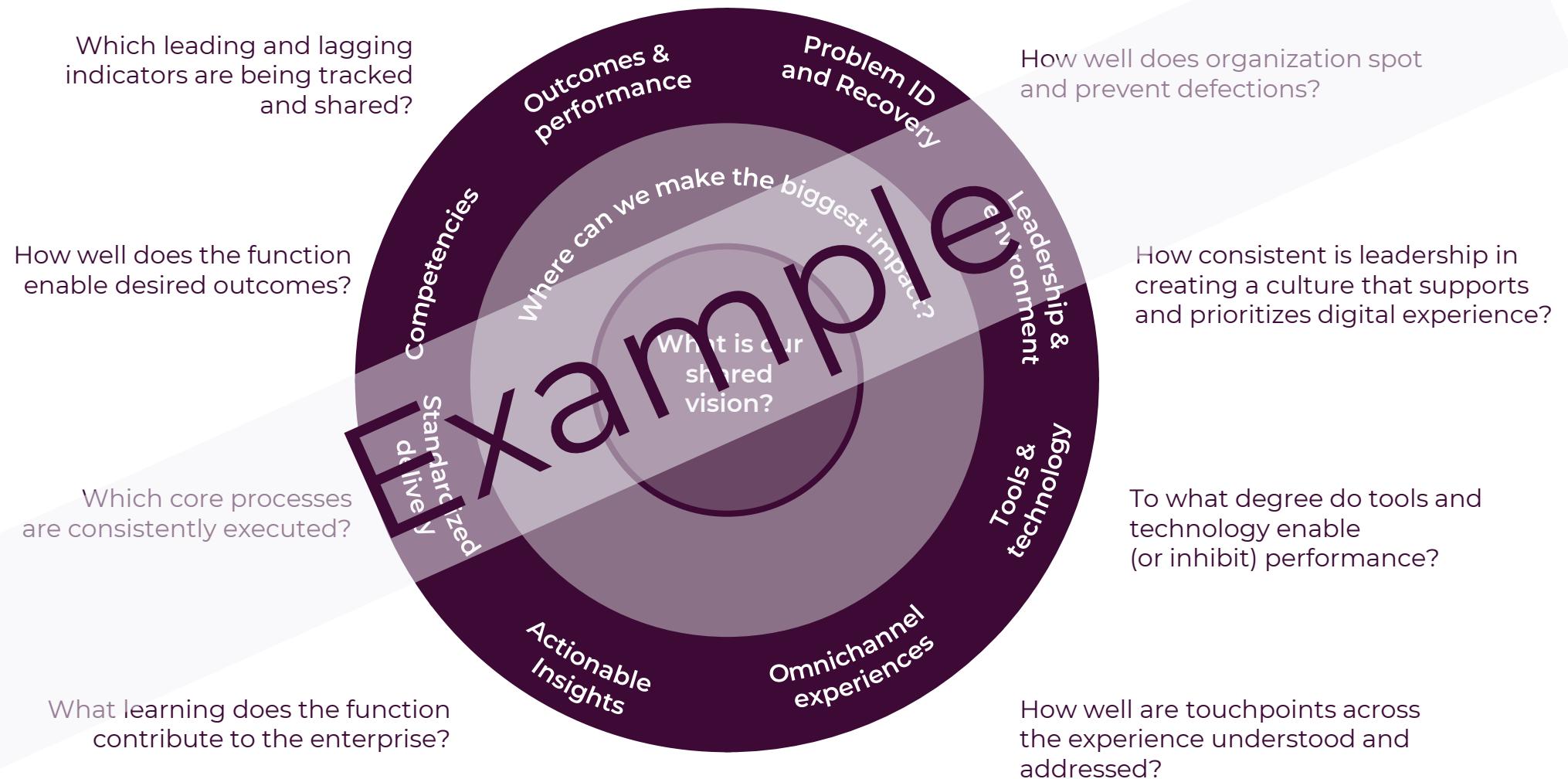
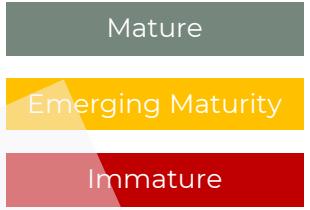
Example

Transformation Roadmap Overview

Wave 1 – Optimizing Resources		Wave 2 – Expanding our Influence	Wave 3 – Becoming the Exemplar
Digital Experience	<ul style="list-style-type: none"> Invest in (Cloud System) Design digital patient experience journey Hire or outsource dedicated SFDC developers Evaluate website technical support 	<ul style="list-style-type: none"> Call Center/Welcome Center Address online scheduling Integrate dual-platform digital experience Online Scheduling 	<ul style="list-style-type: none"> Align SEO and SEM strategies between "system" and "campus" Consolidate content to avoid channel conflicts Utilize persona journey mapping A seamless, omnichannel digital strategy across all patient and employee touchpoints Data drives personalized patient experiences and predictive healthcare solutions Leverage automation through feeds and AI Optimize tech stack to support consumer, physician, employee, and population health initiatives Strategic investment in digital tools and resources
Brand Management	<ul style="list-style-type: none"> Establish a brand leader role and resource a brand team Finalize content and messaging strategy Launch Internal campaign 	<ul style="list-style-type: none"> Establish ongoing brand budget Consistent pace of external brand campaign Activate brand champion program Expand sponsorships and partnerships 	<ul style="list-style-type: none"> Sustain brand across all platforms and channels Deepen partnerships and community engagement Optimize content, expand access to the brand portal Implement advanced tracking of brand performance
Internal Comm.	<ul style="list-style-type: none"> Build internal communications team Create and standardize internal channels Establish an intranet deployment strategy Create KPIs and dashboards 	<ul style="list-style-type: none"> Establish ongoing internal comm budget Optimize internal channels Develop a comm team, evaluate competencies 	<ul style="list-style-type: none"> Advanced tools and leadership engagement Optimize leader resources Mature team, competencies, career pathways
Operational Excellence	<ul style="list-style-type: none"> Department-wide program management Standardize processes Build analytics infrastructure to demonstrate ROI System to workflow management Establish feedback channels Market MarCom 	<ul style="list-style-type: none"> Editorial culture Connect the team to purpose Address engagement scores Infuse team building Best practices for remote workers Mature continuous improvement process 	<ul style="list-style-type: none"> Culture of innovation Data and analytics drives smart investment in strategic resourcing Welcome Center supported by central scheduling Marketing efficiency benchmarking
Optimize Resources	<ul style="list-style-type: none"> Add FTEs based on recommendations Complete competency evaluation of staff Complete contingent labor analysis Establish role clarity Evaluate leadership portfolios 	<ul style="list-style-type: none"> Add FTEs based on recommendations Organize by "beats" for key service lines Train and coach for strategy Align marketing strategists to service lines and BUs Optimize the staffing / vendor mix Develop an operational scaling model Consolidate physician liaison services 	<ul style="list-style-type: none"> Add FTEs based on recommendations Leverage contingent labor and vendors to scale Utilize strategic vendors and partners Smart Investment in resources for strategic priorities Budgets and resourcing aligned to strategic priorities
Content & Channel Strategy	<ul style="list-style-type: none"> Establish content / channel strategy SEO rigor for content production and analytics Optimize mix of in-house and contract content development Create editorial review process Evaluate roles (levels, competencies) Organize into beats 	<ul style="list-style-type: none"> Content strategy between "campus" and "health system" Enable channel optimization Assess channels for value and objectives Create governance and self-service Automate content to scale production 	<ul style="list-style-type: none"> Mature the content team Optimal infrastructure, ability to scale Measure content and channel effectiveness

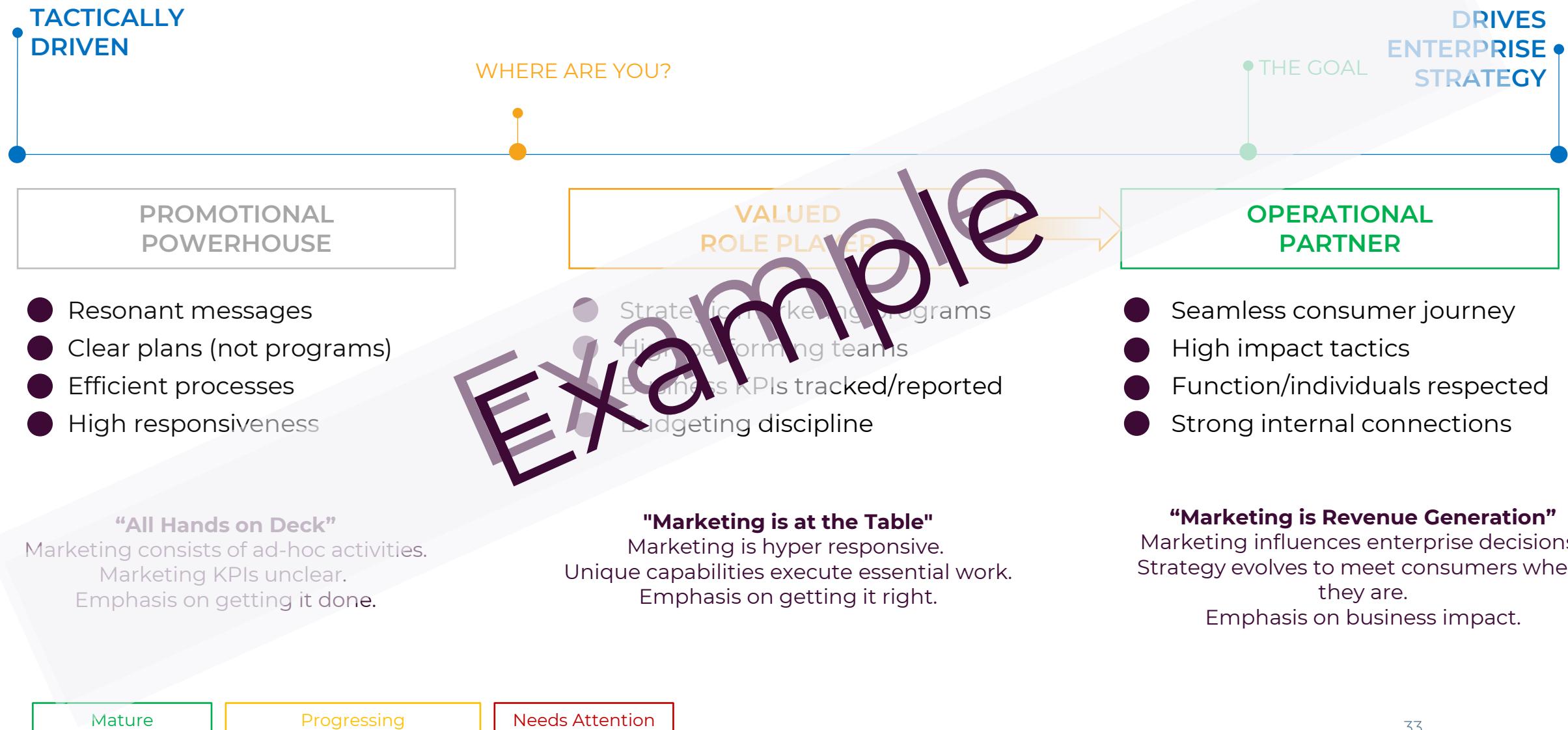
Example

Maturity Dimensions



Maturity Assessment

Where you are vs. ideal state



Purpose Placemat

ORGANIZATIONAL PURPOSE:

Design and enable optimal marketing function to **drive revenue growth and exceptional employee and patient experiences**

WHAT WE DO

- What is the organization counting on your team to do?
- What are the outcomes that your team is striving to achieve?

WHY WE DO IT

- Having a clear purpose and a connection to the mission is foundational to ensuring team and organizational buy-in.

HOW WE DO IT

- What strategies, policies and practices govern your work?
- How are they measured?

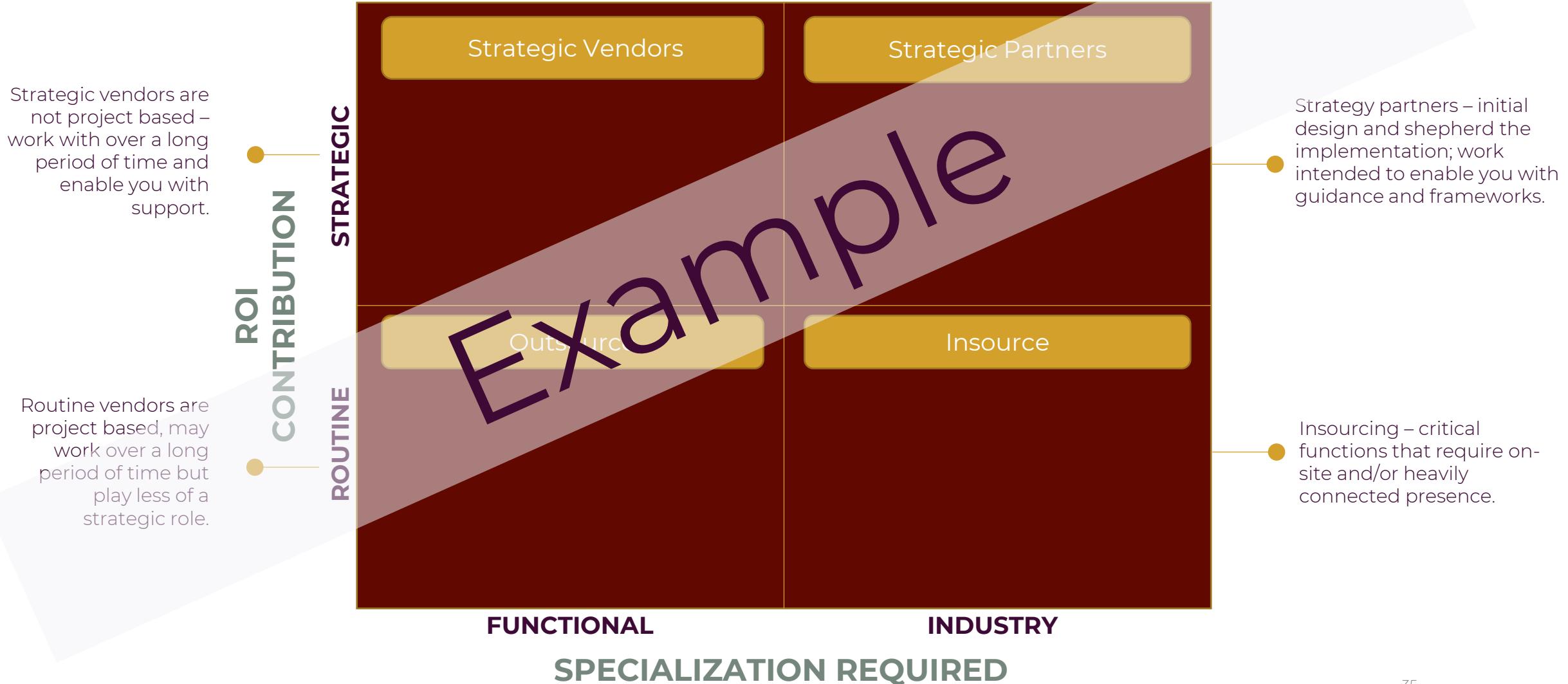
WHAT WE CELEBRATE

- An aligned understanding what success looks like enables the team to celebrate wins (both milestones and significant achievements)
- Celebrating is a key strategy for reinforcing key goals, building team confidence and boosting morale and experience.

Example

Ecosystem Matrix

The elements that require deep industry knowledge vs. flexibility/ownership



Governance Structure

	Function	People	Remit
THE WHY	Aligning business objectives with strategic goals	Marketing Leader VP Marketing, CMO and/or CGO (choose one)	<ul style="list-style-type: none"> - Developing the strategy - Creating a sustainable roadmap - Monitoring program progress
THE WHO & THE HOW MUCH	Ensuring alignment and inclusiveness of internal stakeholders and user needs; secure funding approval	Executive Sponsor(s) CEO, COO, and/or CFO (choose one)	<ul style="list-style-type: none"> - Communicating and ensuring alignment with enterprise initiatives - Eliciting executive-level support - Obtaining funding - Advocating for change
THE GUIDANCE	Setting priorities, allocating cross-team resources and resolving conflicts	Steering Committee Clinical, Patient Experience, Operations, Digital / IT	<ul style="list-style-type: none"> - Supporting consumer insights and patient experience alignment - Clinical insights and alignment with clinical priorities
THE ACCOUNTABILITY	Establishing responsibility for meeting objectives	Program Management Project Management, Marketing Management, Service Line Managers	<ul style="list-style-type: none"> - Reviewing portfolio of activities for bottlenecks - Developing agile workplans - Communicating progress against KPIs
THE MOMENTUM	Design, development and delivery of experiences	Implementation Data & Analytics, Market Research, Developers, Content Creators, Process Improvement teams, Trainers	<ul style="list-style-type: none"> - Designing and developing experiences - Testing optimization - Alignment with overall roadmap
THE FACE OF CHANGE	Illuminating visible changes and successes	Champions Change Communicators, Enrolled Ambassadors for the change	<ul style="list-style-type: none"> - Being the model for change - Providing informal feedback - Carrying the change message

Example

Roadmap

Your roadmap through levels of maturity toward the desired future state

Imperative	Level One	Level Two	Desired Future State
Comprehensive Marketing Strategy	A multi-year roadmap is built by engaging the team to define their shared vision for the future. This roadmap includes digital, physicians, and consumers..	There is alignment among internal stakeholders on marketing's strategic plan (such as through a facilitated workshop) and clarity around unique differentiators. Activities are aligned with growth priorities (including choosing what we will not resource). Dots are connected between marketing and operations.	Marketing is seen as a trusted business partner. This includes an agenda to drive growth like new products, experience mapping, overcoming choice barriers, and activating a differentiating brand strategy with customer experience.
Strategic Internal Alignment	Leadership achieve strategic alignment on the marketing strategy, shared vision, and goals. Outcomes are realistic and achievable, considering resources and budget.	Marketing sits at the table and proactively engages in the strategic and annual planning process. Teams are aligned on a multi-channel consumer centric vision.	The marketing team leads the organization to identify growth and strategic opportunities. Marketing's strategy seamlessly aligns with the organization's broader goals and enables informed decision-making.
Optimized Resources	An audit identifies resources and critical gaps (such as digital). The team prioritizes what's done in-house vs. vendors and compares the current budget against priorities and needs. A recommended budget and resource plan is created to balance the workload.	Benchmarks are established with finance and leadership to trigger investments in appropriate marketing resources to drive business through targeted brand response. Marketing focuses resources by prioritized targeting (such as high-volume physician referral splitters)..	Digital content is monetized to drive value, including revenue generation. Initiatives are data-driven and synchronized with systemic goals. The marketing team uses "train up" and coaching for individual service lines to provide tools and resources so they can participate in marketing activities and content creation specific to their clinical area.
Etc...			

Example