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MOVING HEALTHCARE AHEAD®

Marketing's Secret Weapon for Improved Patient Engagement

Gary Druckenmiller
Marketing Practice Leader
Evariant

Meet your speaker

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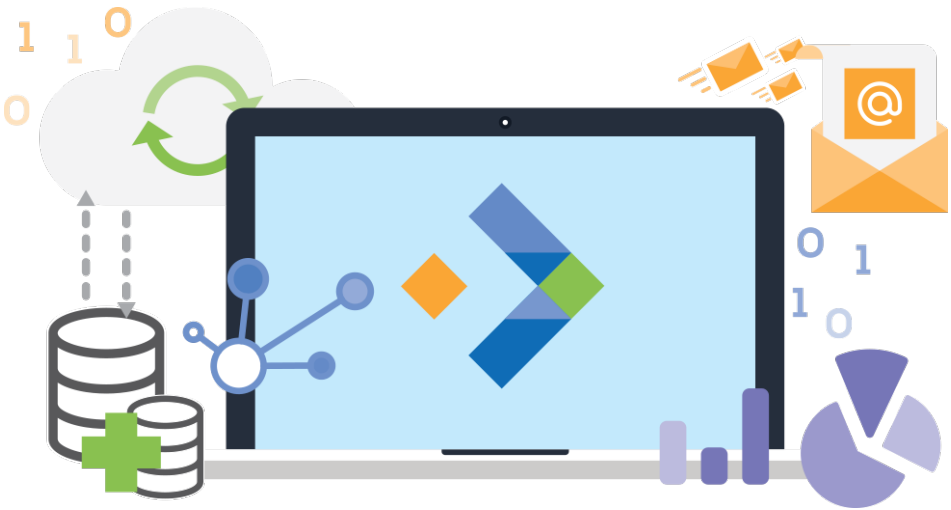
About Evariant

The leading provider of a healthcare CRM platform designed to help health systems thrive in today's hyper-competitive and rapidly changing environment.

See all our events and get registered by visiting Evariant.com/events or email events@evariant.com.



Agenda

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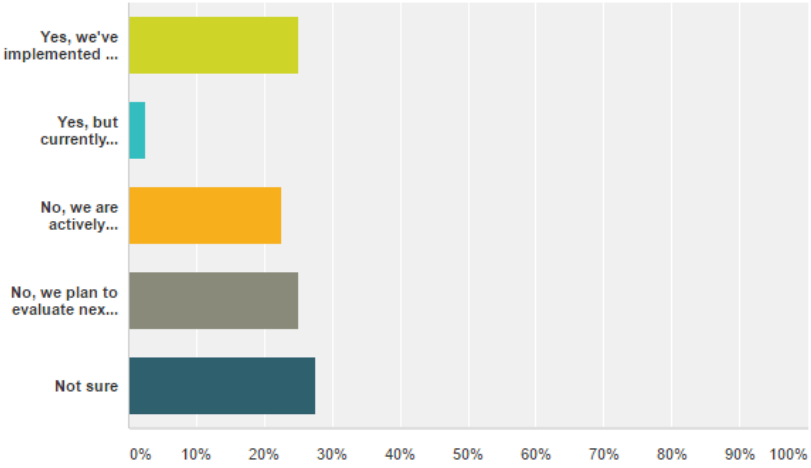
- What You Think
- What is Marketing Automation?
- What to Look for in a Marketing Automation Tool
- How to Nurture Acquired Consumer Prospects
- How to Engage and Retain Existing Patients
- Campaign Ideas and Concepts
- What Others are Doing
- Final Thoughts

Q1

Do you currently have a marketing automation solution?

Answered: 40 Skipped: 0



Answer Choices	Responses	
Yes, we've implemented and started using	25.00%	10
Yes, but currently implementing	2.50%	1
No, we are actively considering	22.50%	9
No, we plan to evaluate next year	25.00%	10
Not sure	27.50%	11
Total Respondents: 40		

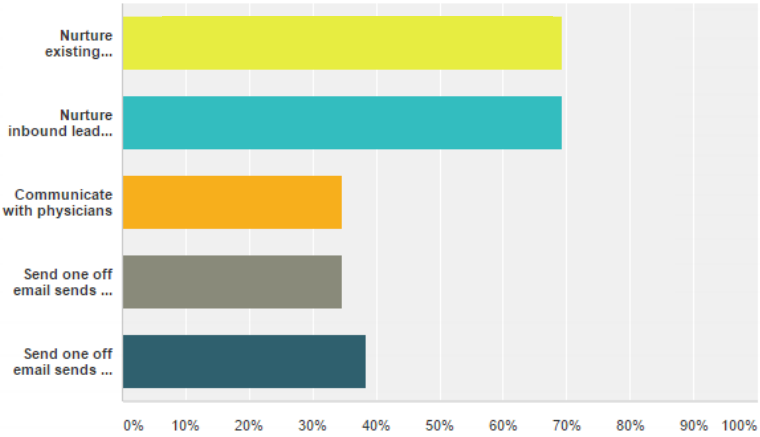
Comments (4)

Almost 75% of those surveyed DO NOT yet have a marketing automation tool or are ***unsure*** if they do.

Q2

If you have a marketing automation tool in place or are planning on implementing one soon, how do you use it? Please check all that apply.

Answered: 26 Skipped: 14



Answer Choices	Responses	
Nurture existing patients	69.23%	18
Nurture inbound leads (prospective patients)	69.23%	18
Communicate with physicians	34.62%	9
Send one off email sends to existing patients	34.62%	9
Send one off email sends to leads (prospective patients)	38.46%	10
Total Respondents: 26		

Comments (1)

Well into the majority plan on using marketing automation for “nurturing” both consumers and/or existing patients.

Perfect.

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What is Marketing Automation?

Marketing Automation Defined

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A persistent methodology for **acquiring/developing prospects and engaging patients** so that they keep your health system on the “list for consideration.”

Words to Live By

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"Not implementing a Marketing Automation (MA) solution may be the ultimate career limiting move for today's marketers. **If you haven't gotten started you're already behind the 8 ball**."

Gary's Words to Live By

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"**Marketing automation rules. Seriously, it kicks butt. You need it.** You can personalize content easier. Qualify prospects faster. Cut 100 hour campaigns down to 10. Gleam a 71% improvement in YOY acquisition cycle time. 51% improvement in clinical conversion rates. And 54% in patient engagement.

What's up?"

Gary D., about 8 days ago

THE STATS ON

MARKETING AUTOMATION

BEING A PRIORITY TO CMO'S OR OTHER C LEVEL EXECS

30%

OF MARKETING-RELATED TECHNOLOGY & SERVICES ARE ALREADY PURCHASED BY MARKETING EXECUTIVES, AND IN 2011

B2B & B2C

MARKETING BUDGETS WERE ALMOST THREE TIMES AS HIGH AS IT BUDGETS

HOW MANY FORTUNE 500, MID-LEVEL AND SMALL COMPANIES ARE USING MARKETING AUTOMATION ?

15%

OF SMALL & MIDSIZE BUSINESSES(SMBS) HAVE **ADOPTED A MAP.**

36%

INDICATED THEY ARE **PLANNING TO USE A MAP** WITHIN THE NEXT YEAR - THAT'S MORE THAN DOUBLE!

25%

OF FORTUNE 500 COMPANIES **USE** MARKETING AUTOMATION.

(MARKETING AUTOMATION PLATFORM = MAP)

4,000+

ATTENDED THE CONNECTIONS EVENT LAST YEAR. THIS WAS

RECORD-SETTING.

MARKETING IS THE FASTEST-GROWING CRM

CATEGORY FOR 2012 WHEN IT GREW AT 21%, MORE THAN FOUR TIMES THE SOFTWARE INDUSTRY FORECAST NORM FOR THAT YEAR.

Salesforce.com noted that Gartner has forecasted that 21 percent spending growth to continue through 2017.

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THE NEED FOR AUTOMATION

Marketing and sales departments alike experience issues with the lead generation process. These issues can lead to a disconnect between the two departments, but that can be corrected with automation.

68%

68% of companies have not identified or attempted to measure their sales funnel.

65%

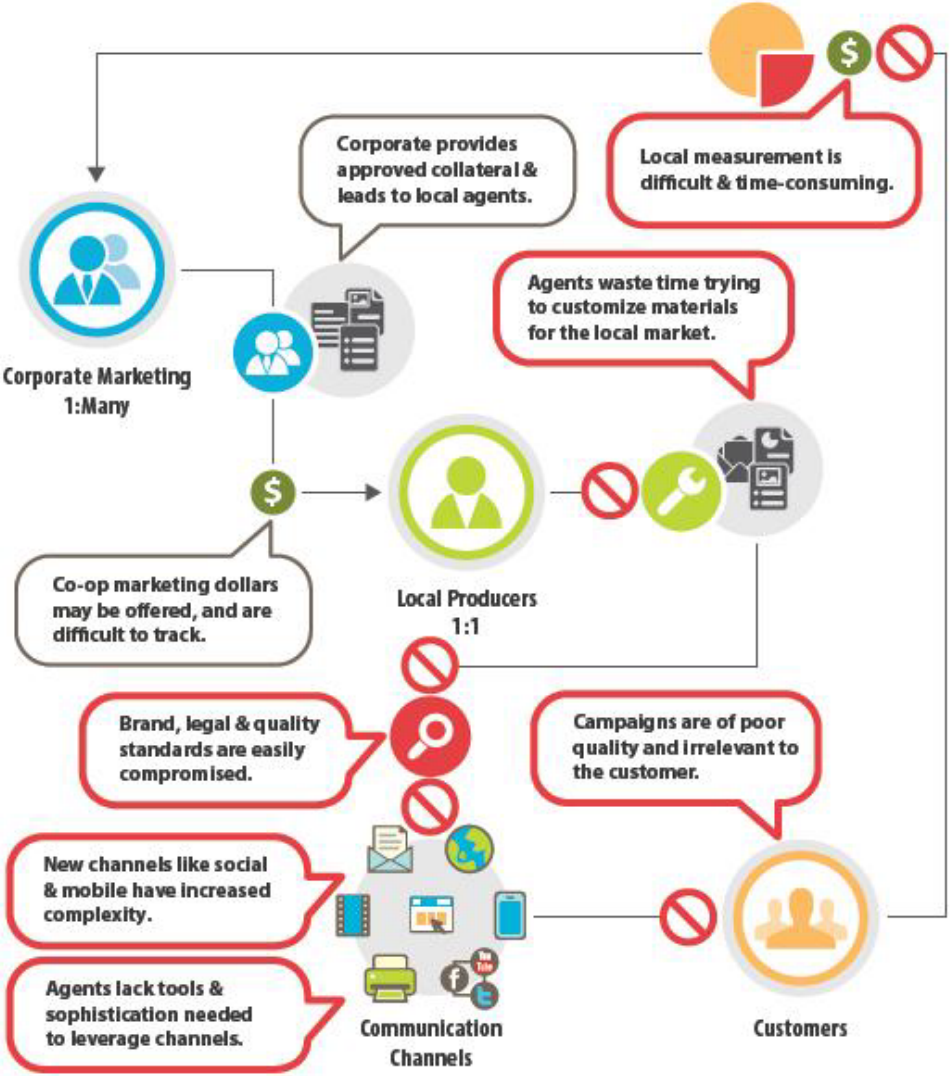
65% of companies have no defined lead nurturing process or toolset.

79%

A staggering 79% of marketing leads are never converted to sales.

56%

Only 56% of companies have a system or toolset in place to qualify marketing leads.


Corporate provides approved collateral & leads to local agents.
Local measurement is difficult & time-consuming.
Corporate Marketing 1:Many
Agents waste time trying to customize materials for the local market.
Co-op marketing dollars may be offered, and are difficult to track.
Local Producers 1:1
Brand, legal & quality standards are easily compromised.
Campaigns are of poor quality and irrelevant to the customer.
New channels like social & mobile have increased complexity.
Agents lack tools & sophistication needed to leverage channels.
Communication Channels
Customers

The Ultimate MA Goal

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	The Start	Progress	Nirvana
Consumer-Centric Content	Mimic messages across channels and media manually	Integrate response reporting for online/offline and for print/email/voice campaigns	Automate integrated campaigns and reporting across channels and media
Data-Driven Content	Blast campaigns targeted to segments based on product history	Different versions to different lists to improve relevant messaging	Automated 1 to 1 dynamic messaging using print on demand and dynamic email
Preference Center	eMail & Phone Opt-in	Basic preference profiles	Many explicit preference options combined with implied preferences based on behavior
Analytics & Behavioral Targeting	email & site behavior tracked separately from conversion response behavior	Use email & Web behavior to improve email cadence	Triggered print/email/voice messaging based on preferences, Website, email & purchase behavior
A/B & Multi-Variant Testing	Ad hoc campaign testing	Turnkey routine testing	Automate reporting dashboards throughout the organization

Highlights of Marketing Automation

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Automate repetitive tasks

Reduce human error

Streamline marketing organization activity

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What to Look for in a Marketing Automation Tool

Lots of Vendors

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Numerous Cloud Based Marketing Automation Systems

salesforce marketing cloud

ORACLE | eloqua

eTrigue
Marketing Automation for the Rest of Us

HubSpot

Marketo

optify

TERADATA

SalesFUSION™

Infusionsoft
Small Business Sales & Marketing

Qualification

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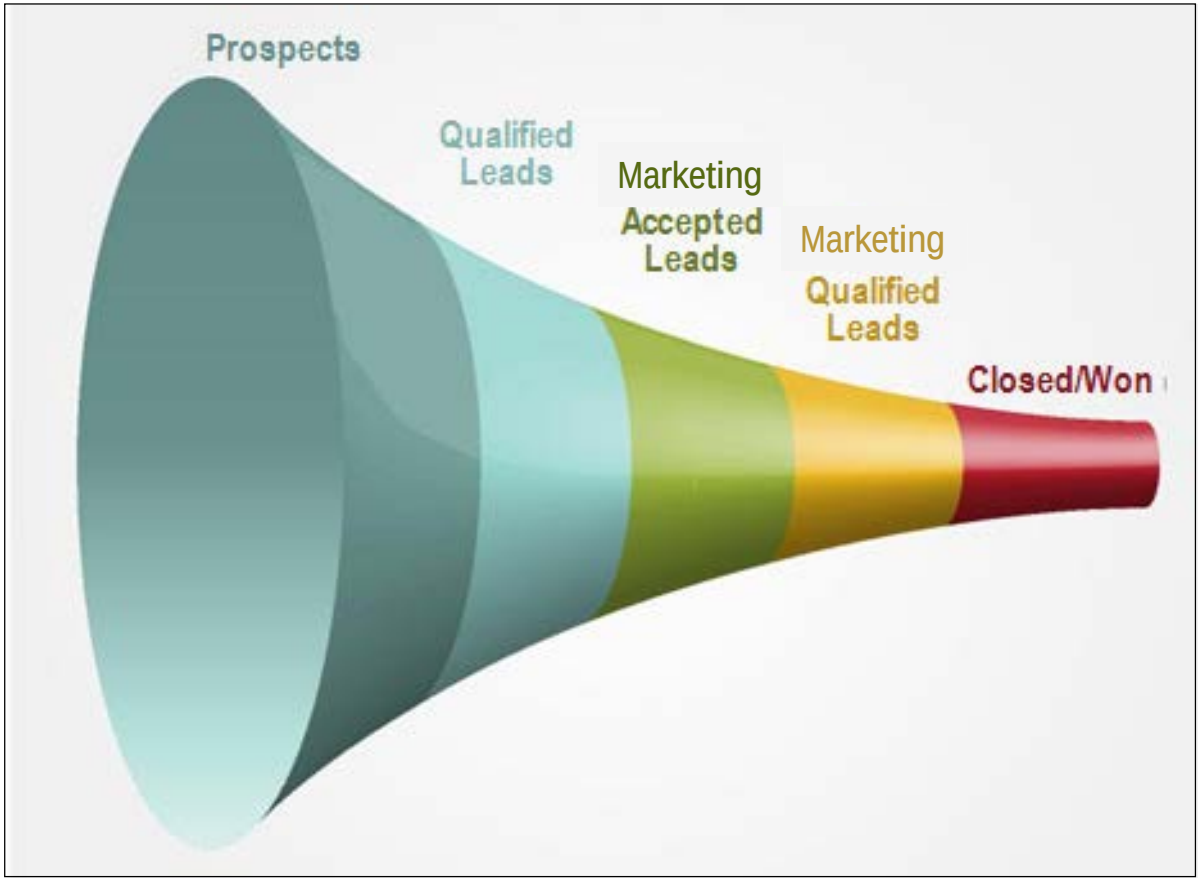

Personalization

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Nurture Email - Personalized and Relevant

From: Jim Redmond
To: Jason Smith
Cc:
Subject: Forrester Lead Generation Report
Sent: Wed 3/5/2008 8:19 PM

Hi Jason,

I noticed you were on the site today and downloaded our 8 Critical Steps to Lead Generation Guide. I also thought that you may also be interested in a new Forrester Report on Lead Generation available complimentary to you at http://www.omniture.com/forresterleadgeneration.

We've been helping a number of our High Tech marketing customers similar to Software, Inc improve lead generation through Omniture Test&Target as well as measure important campaign results beyond the lead such as opportunities, closed deals, and sales with Closed Loop Marketing for Salesforce.

If you don't mind, as I periodically come across relevant information to assist you in your job, I'll send it to you. Please let me know if I can provide you with a free evaluation report of how www.software.com compares in generating leads to others in the industry – it requires only 15 minutes of your time to walk you through the findings.

Please contact me with any questions at (888) 783-3942.

Jim Redmond
Omniture

Also, if you find that my emails aren't of value to you, please click here and I'll stop sending them – hopefully, this isn't the case.

FIRST NAME: Jason
LAST NAME: Smith
E-MAIL: jsmith@software.com
PHONE: 415 987 9325
COMPANY: Software, Inc
WEB SITE: www.software.com
COUNTRY: United States
STATE/PROVINCE: California
DEPARTMENT/FUNCTION: Marketing
JOB TITLE: VP
PRIMARY SITE OBJECTIVE: Generate leads
INDUSTRY: High Tech
RELATIONSHIP TO OMNITURE: Just browsing

Scheduling

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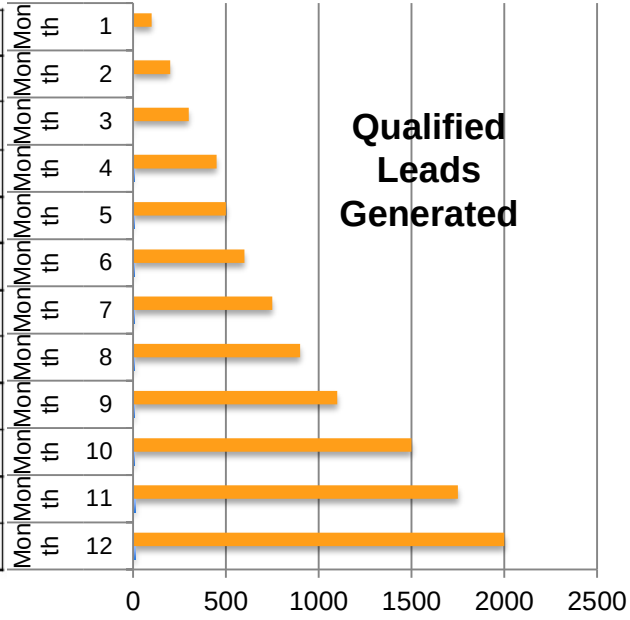
Month 1	3rd party article on decreasing shopping cart abandonment: e-mail & follow-up call/voice mail
Month 2	Forrester Report on behavioral targeting: e-mail & follow-up call/voice mail, mailed report
Month 3	Experts-On-Demand Retail Webinar: e-mail & follow-up call/voice mail
Month 4	3rd party article on holiday shopping tips: e-mail, follow-up call/voice mail
Month 5	Complimentary Retail Site Assessment via OTTO Digital: e-mail, follow-up call/voice mail
Month 6	Invitation to relevant event
Month 7	3rd party article on pertinent technology via e-mail
Month 8	Invitation to webcast via e-mail with follow-up call
Month 9	Free report via direct mail with follow-up call
Month 10	Invitation to local seminar via e-mail with follow-up call
Month 11	Link to relevant partner webcast via e-mail with follow-up voicemail
Month 12	Retail Industry case study via e-mail with follow-up call



A Focused Direct Marketing Campaign Evolves Over Time To Capture Qualified Leads And Increases Closed Sales

Workflow

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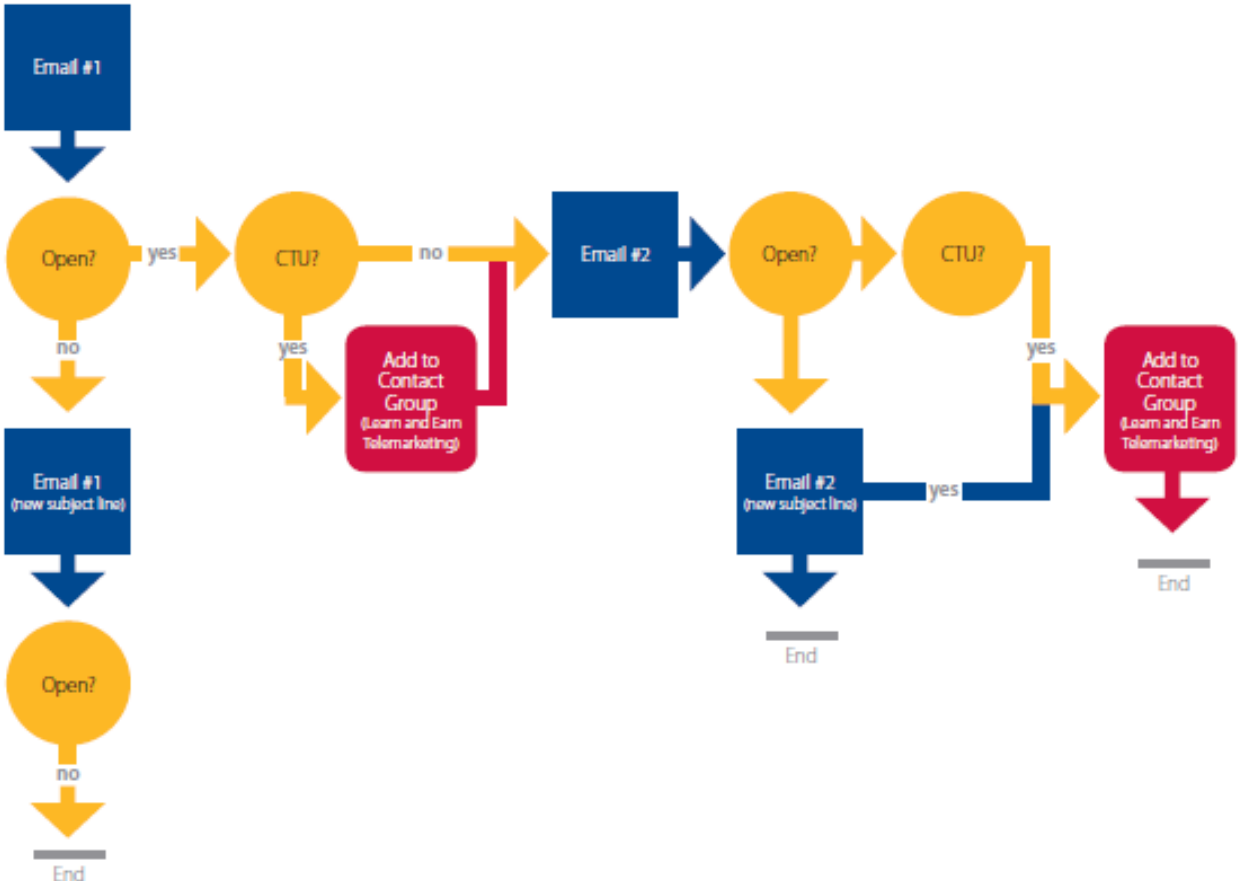

Templating

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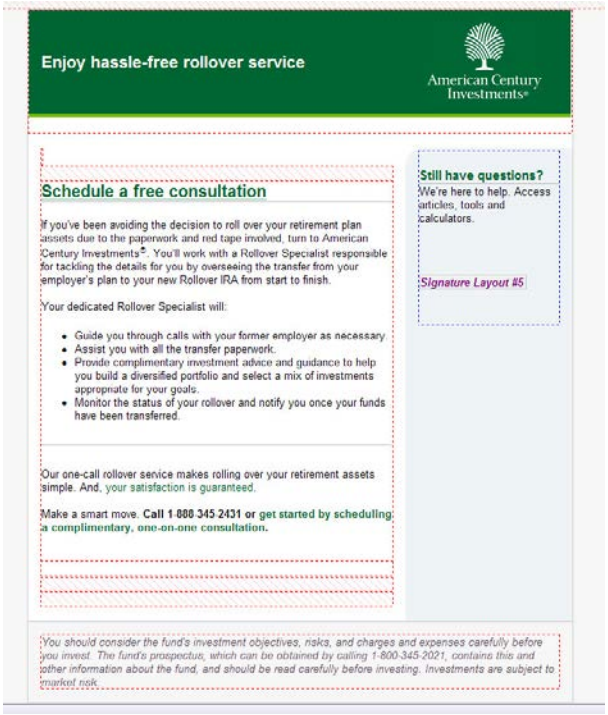
Template Development



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American Century Investments®

Schedule a free consultation

If you've been avoiding the decision to roll over your retirement plan assets due to the paperwork and red tape involved, turn to American Century Investments®. You'll work with a Rollover Specialist responsible for tackling the details for you by overseeing the transfer from your employer's plan to your new Rollover IRA from start to finish.

Your dedicated Rollover Specialist will:

- Guide you through calls with your former employer as necessary.
- Assist you with all the transfer paperwork.
- Provide complimentary investment advice and guidance to help you build a diversified portfolio and select a mix of investments appropriate for your goals.
- Monitor the status of your rollover and notify you once your funds have been transferred.

Our one-call rollover service makes rolling over your retirement assets simple. And, your satisfaction is guaranteed.

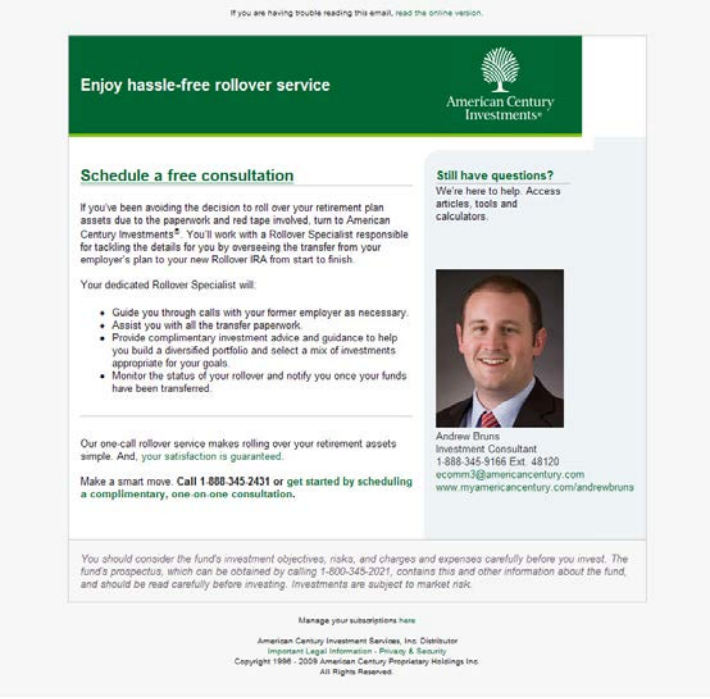
Make a smart move. **Call 1-888-345-2431 or get started by scheduling a complimentary, one-on-one consultation.**

Still have questions?
We're here to help. Access articles, tools and calculators.

Signature Layout #5

You should consider the fund's investment objectives, risks, and charges and expenses carefully before you invest. The fund's prospectus, which can be obtained by calling 1-800-345-2021, contains this and other information about the fund, and should be read carefully before investing. Investments are subject to market risk.

Real World Email



If you are having trouble reading this email, read the online version.

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Andrew Bruns
Investment Consultant
1-888-345-9166 Ext. 48120
ecomm3@americancentury.com
www.myamericancentury.com/andrewbruns

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How to Nurture Acquired Consumer Prospects

Why Nurture?

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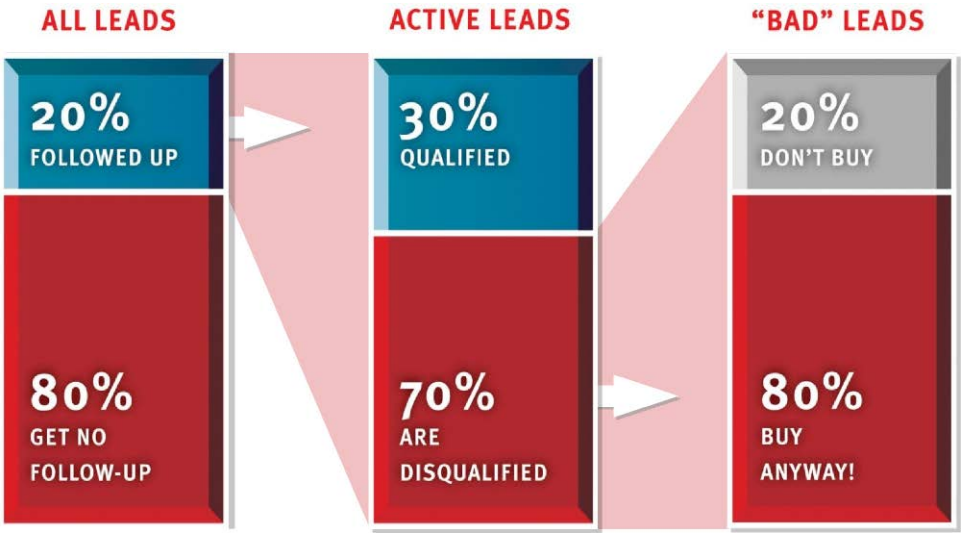
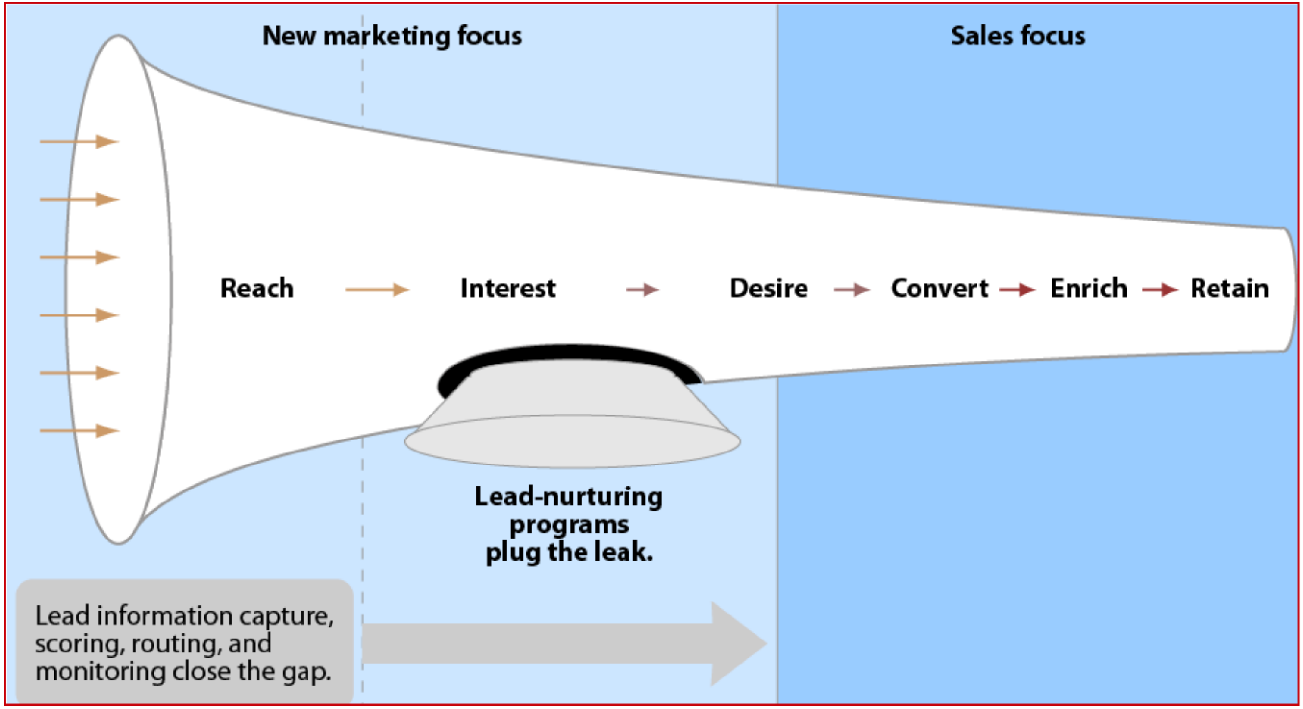
7**0% of marketers** believe that MA technology can help them develop more hig
quality leads. *(Forrester Research)*

Marketing & Biz Dev personnel dedicate **14%** of their time to lead development
only 6.3% of leads are utilized. *(Sirius Decisions)*



Source: Sirius Decisions

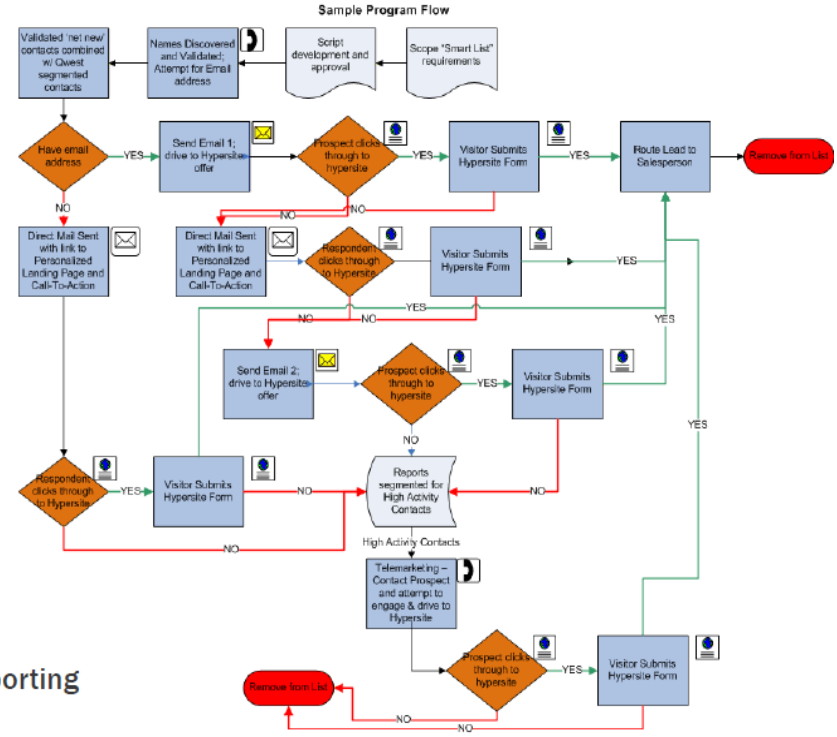
Plugging the Leak



•Source: Forrester's October 2014, Best Practices: **"Improving B2B Lead Management"**

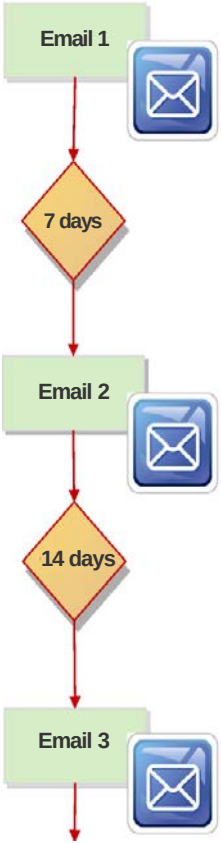
Mapping Your Program

1. Define your objective
2. Define the WHO
3. Define collateral needed
   - Touch point
     - Emails
     - Phone scripts
     - Postcard
     - Letter
   - Content Assets
     - White papers
     - Analyst reports
     - Articles
     - Research Papers
     - Web cast
     - Pod cast
     - Flash demo
   - Interactive media
     - Poll / survey
     - Scorecard / rank yourself against your peers
4. Map out the customer experience
5. Test and launch
6. Ongoing evaluation and monitor reporting
7. Keep content fresh



Best Practices to Start

- Keep it simple to start
- Provide value-added content
- Allow leads to “raise-their-hand” with secondary calls-to-action
- Keep them interested by telling them what is coming next
- Track online activity to determine when a lead’s interest has increased



Best Practices in Flight

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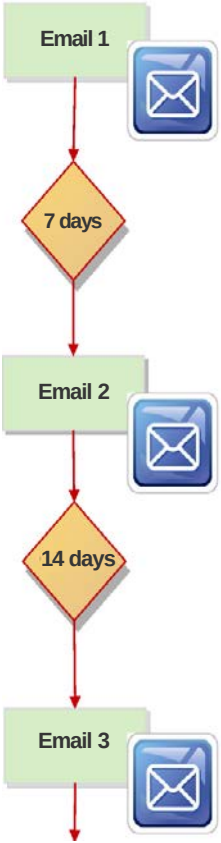
- Nurture leads throughout the **buying cycle**
- Average of 4 touches/program
- **Test timing** between touches
- B2B: 10 days between touches
- B2C: 3-8 days between touches; **more frequent in front half**, then slow



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How to Engage and Retain Existing Patients

Marketing & Ops Procedures

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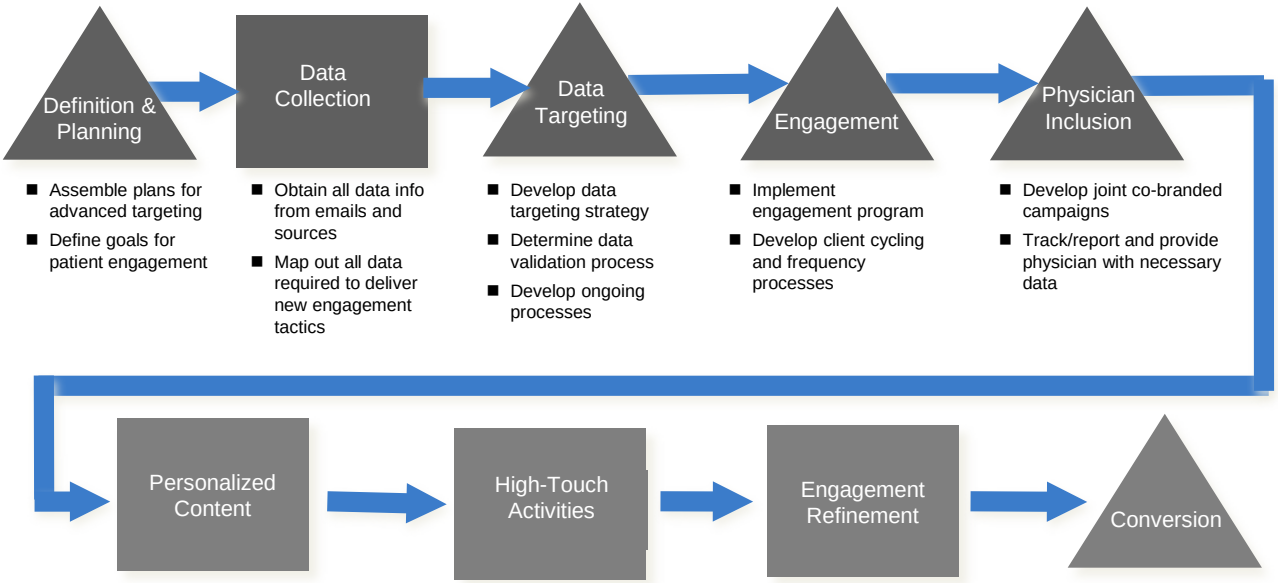

Definition & Planning

- Assemble plans for advanced targeting
- Define goals for patient engagement

Data Collection

- Obtain all data info from emails and sources
- Map out all data required to deliver new engagement tactics

Data Targeting

- Develop data targeting strategy
- Determine data validation process
- Develop ongoing processes

Engagement

- Implement engagement program
- Develop client cycling and frequency processes

Physician Inclusion

- Develop joint co-branded campaigns
- Track/report and provide physician with necessary data

Personalized Content

- Engage top patients with highly personalized content

High-Touch Activities

- Top patient direct mail
- Follow-up with timely phone call and email

Engagement Refinement

- Adjust and re-engage
- Re-target with new messaging

Conversion

- Convert and maintain program

Map the Patient Journey

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- Systematically track the behavior of individuals from the research to conversion stage, and then **work with system operations** to understand where patients drop off, and how we can best target them with the right communication at the right time to reengage them:
  - At what point should an outbound call be placed instead of an email?
  - At what point does the patient move to the patient portal as the main point of connection with system? How should marketing be involved here?
  - How might we help the patient experience after the information session, leading up to surgery, post-surgery, etc.?

Patient Journey Map

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Marketing segment is identified

An individual who was targeted sees an ad (or multiple ads)

Online research about weight loss surgery leads her to UC Medicine's website

A week later, further research lands her on a UC Medicine campaign landing page where she fills out a form to register for an information session

She receives a thank you email and event confirmation

She recieves an event reminder the day before the event

She attends an information session

New Patient Visit

Pre-op Psychology Screening

Pre-op medical and surgical screenings

6- 9 months later -- after medical weight management, support groups, pre-op testing, etc...

She has bariatric surgery

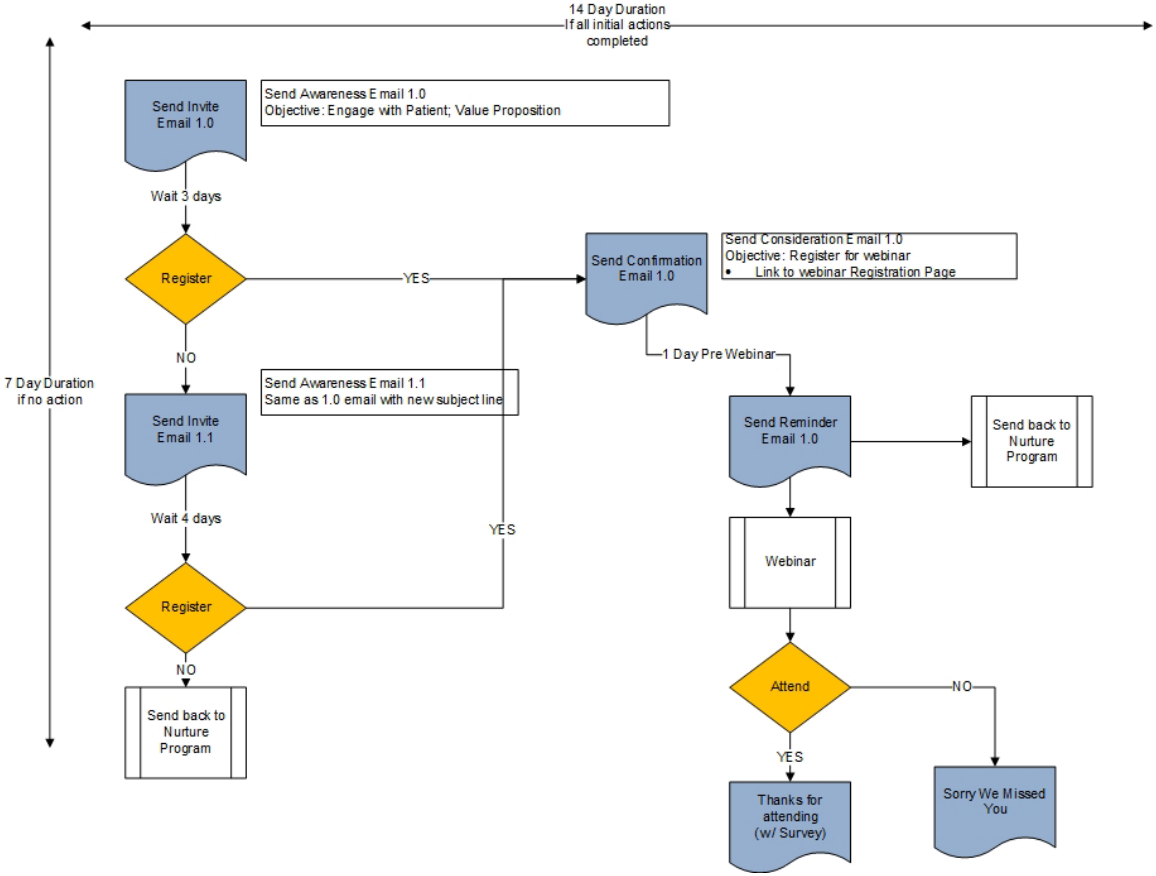
She has post surgery medical care and concerns. Her skin is flabby. She is in pain. She has to be on a liquid diet. She still has diabetes, but it is being managed by a non-penn primary care provider (MAYBE).

She recieves an email about our plastic surgery program

She has a lower body lift done 6 months later

She brags about UC Medicine's care to her friends, rates her doctors on public websites, joins the weight loss online community, and offers to post her patient testimonial online

Patient Retention Program



7 Rules of Engagement

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1. Do not initiate contact without a clear objective.
2. Start with the patient, not the service.
3. Pick up where the last interaction left off.
4. Don’t ask a patient for the same thing more than once.
5. Make the interaction personal and personalized.
6. Deliver information that reflects what you’ve learned about them.
7. Learn about patients in bits….not all at once.

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Campaign Ideas

Campaign Ideas

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Interest Learn Evaluate Justify Purchase

	Welcome Campaign	Education Campaign	Why Us Campaign	Urgency Campaign	New Customer Onboarding	Customer Loyalty / Retention
GOAL	Welcome new subscribers	Get them ready to talk to Sales	Juxtapose your solution to their need	Remove roadblocks, speed purchase decision	Welcome new customers	Retain and develop
DESCRIPTION	• Introduce brand • Reiterate subscription benefits • Spell out next steps • Opt-in to something else	• Engage to further profile prospect • Educate about value prop	• Differentiate your brand from competitors • Reiterate value prop • Include relevant case studies, testimonials	• Provide decision tools	•Thank them • Identify next steps	• Reiterate purchase/ •relationship benefit • Seek feedback • Tips/tricks to get most of product

Welcome Program

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- The Patient Communication Welcome Program is your first formal interaction with a new patient. It is a critical opportunity to thank your patients for their confidence, to reaffirm their purchase decision, and to set the tone for their patient experience.
- Evariant recommends a multi-channel campaign to make a more powerful and positive first impression with new patients, including…
  - Email thanking the patient, encouraging download of service info and linking to an patient social microsite through a personalized URL
  - Direct mail reinforcing purchase decision, providing certificates for services and first service, and motivating the patient to visit the patient's social microsite
  - Patient's social microsite where visitors can upload and share patient experiences, profiles and photos. The site would also enable patients to spread the good word about their new experience to friends and family, inviting them visit the personalized URL.

Retention Program

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- An ongoing retention program will continuously fill the pipeline by communicating with your best patients on a consistent basis.

- This program will tap into the vast quantity of existing patients that are in-market for additional treatment or surgery every day.

- Each month, qualified prospects from the following potential sources will be driven to a microsite/website to learn more about the service line or brand
    - Former patients, who still model in-market
    - Lifestyle events
        - New Movers
        - Recent failed surgery
        - Recent failed treatment

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What Others are Doing

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Penn
Medicine

Fertility Acquisition Campaign

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Campaign Duration: 5 Phases from November 2011 – June 2014

Preceded by a multi-channel campaign. Automation was used to send a series of emails to those interested in learning about Penn Fertility care.

GOALS

- Increase consultations and convert consultations into new patient

STRATEGY

- Guide individuals facing fertility issues to recognize their need to seek help
- Continue to communicate with patients through decision period

Fertility Acquisition Strategy

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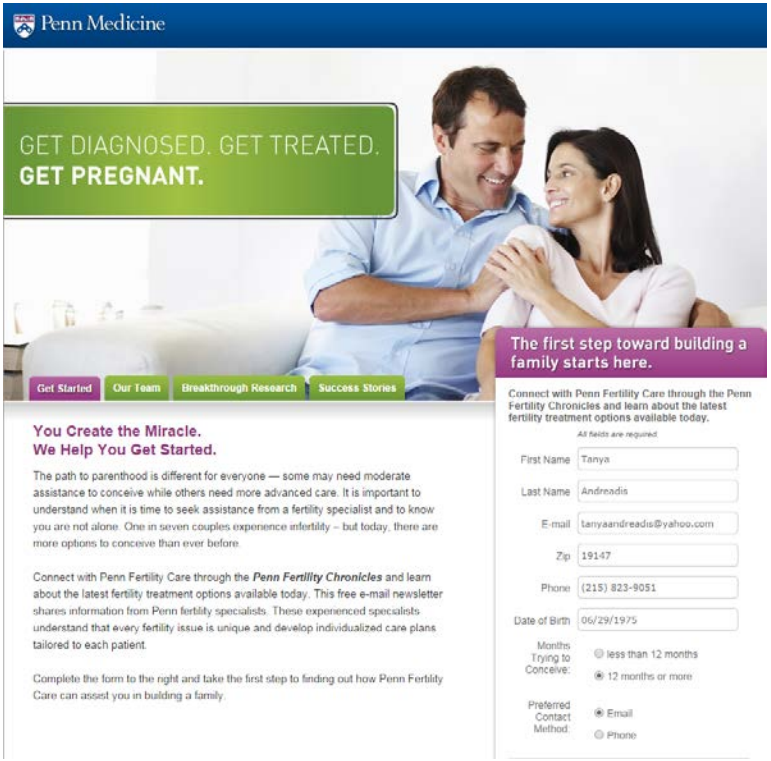
CTA Strategy: Soft CTA to convert leads, and provide an opportunity for ongoing engagement. Hard CTA for those ready to take action.

Nurturing Content: *Penn Fertility Chronicles* including 8 individual chapters



Fertility Campaign Automation

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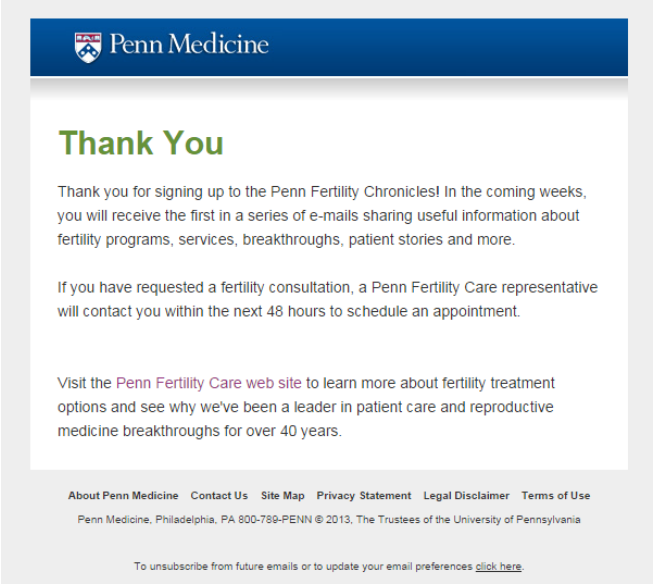
- All email content completed ahead of time, and scheduled within Eloqua.
- After form completion on the landing page:
  - Thank you email sent immediately
  - Issue 1 of chronicles sent withy in a day
  - Subsequent issues sent every month for 8 months to correspond with the ovulation cycle



Penn Medicine

Thank You

Thank you for signing up to the Penn Fertility Chronicles! In the coming weeks, you will receive the first in a series of e-mails sharing useful information about fertility programs, services, breakthroughs, patient stories and more.

If you have requested a fertility consultation, a Penn Fertility Care representative will contact you within the next 48 hours to schedule an appointment.

Visit the Penn Fertility Care web site to learn more about fertility treatment options and see why we've been a leader in patient care and reproductive medicine breakthroughs for over 40 years.

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Fertility Nurturing Results

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› Total Delivered: 20,000

› Total Opens: 6,000

› % of Total Opens: 30%
(Industry Standard: 15-30%)

› Total Appointment Requests: 45 directly from email

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Wake Forest™
Baptist Health

What Do I Now Know About My Leads?

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Take Online Self-Assessment

Register for a Seminar

Download a Guide

(Nurturing for Acquisition Purchase Process: Interest, Learn, Evaluate, Justify, Purchase)

Lead Segmentation
Lead Interest
Lead Behavior
Lead Buying Stage

Compared to just ‘pushing to a website…’

‘Healthcare’ Buying Process

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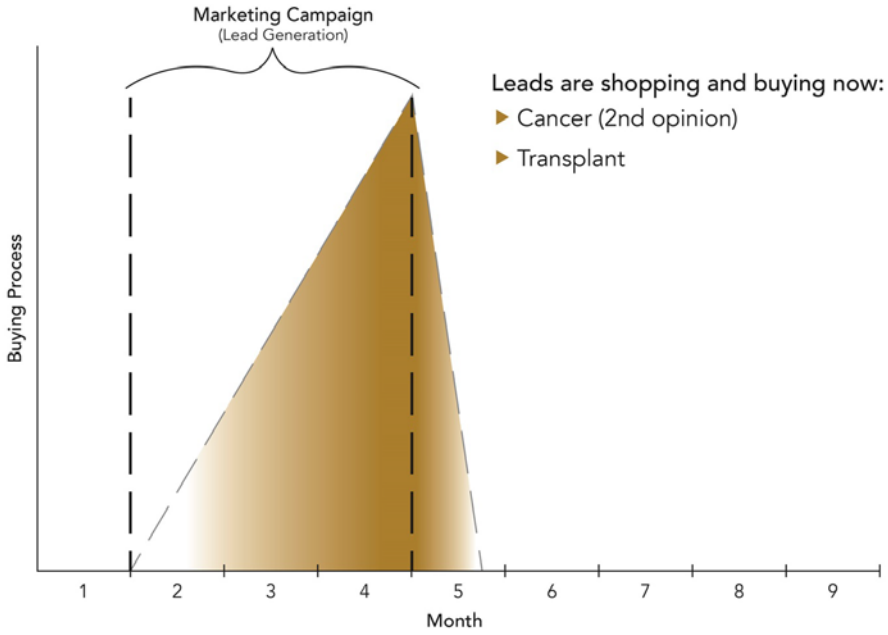
Example 1



‘Healthcare’ Buying Process

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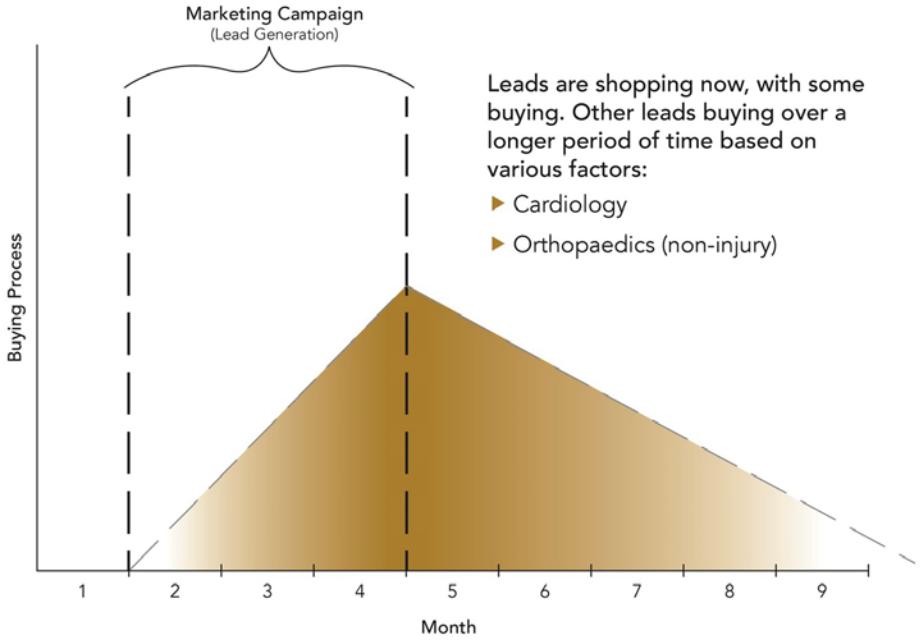
Example 2



‘Healthcare’ Buying Process

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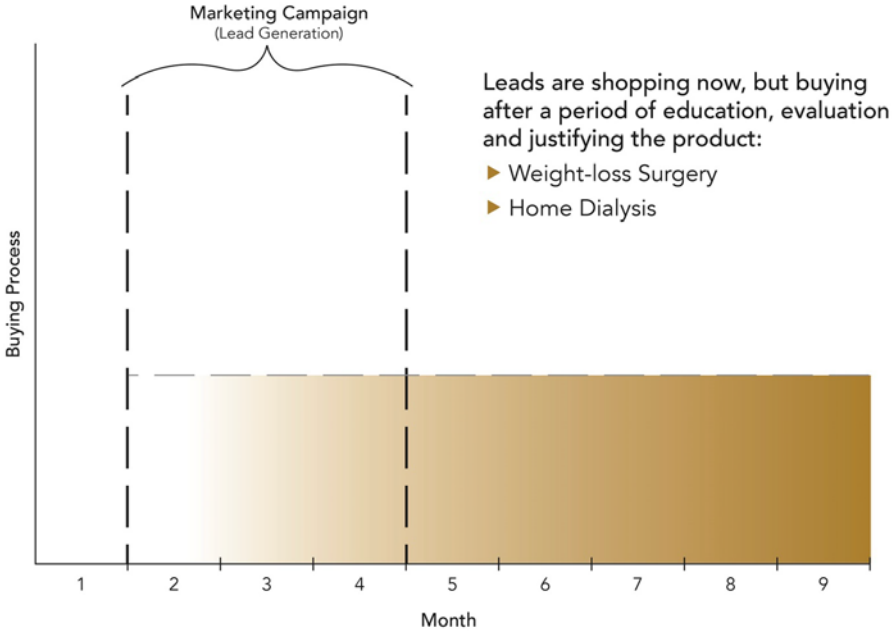
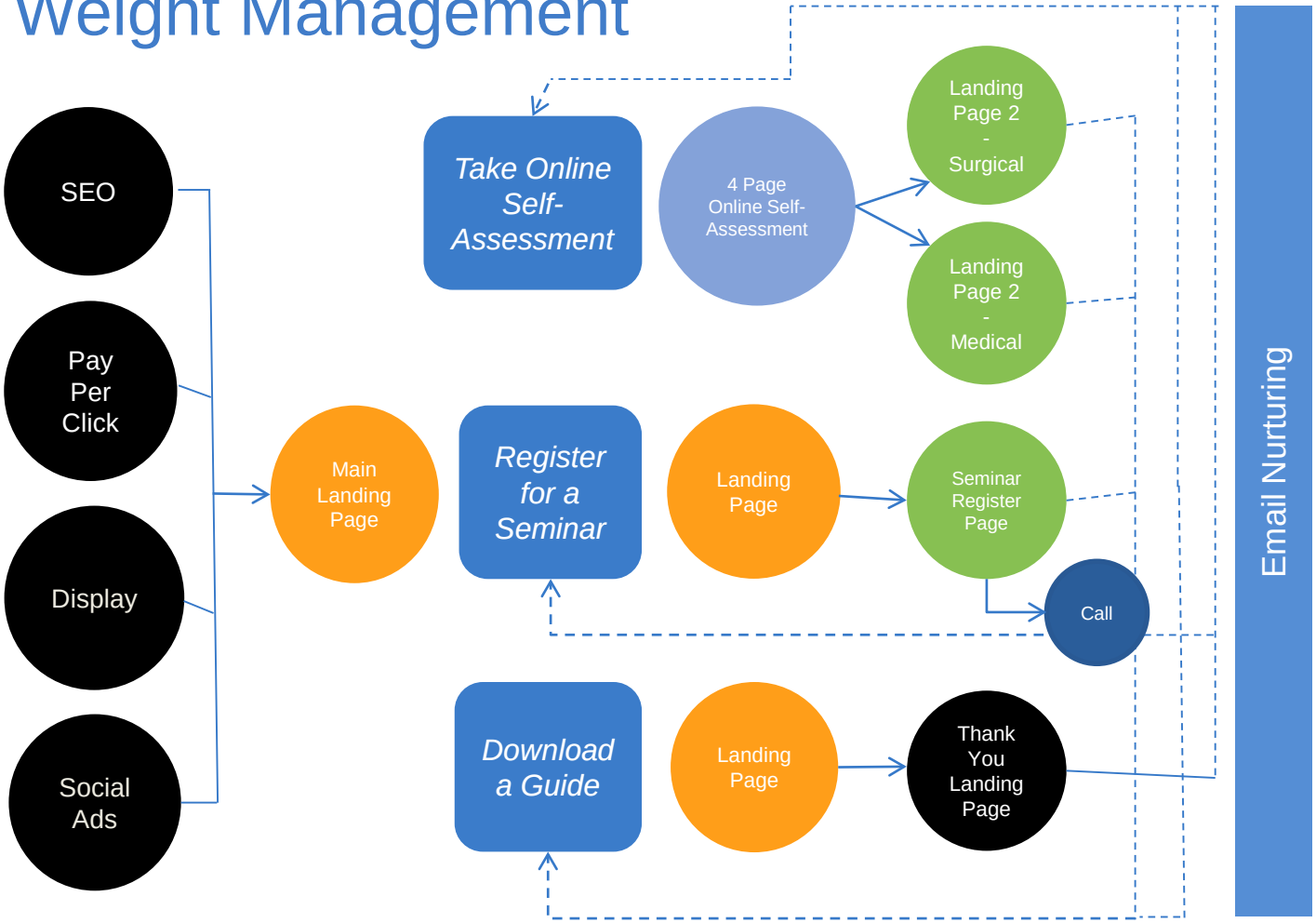
Example 3



Weight Management



Weight Management

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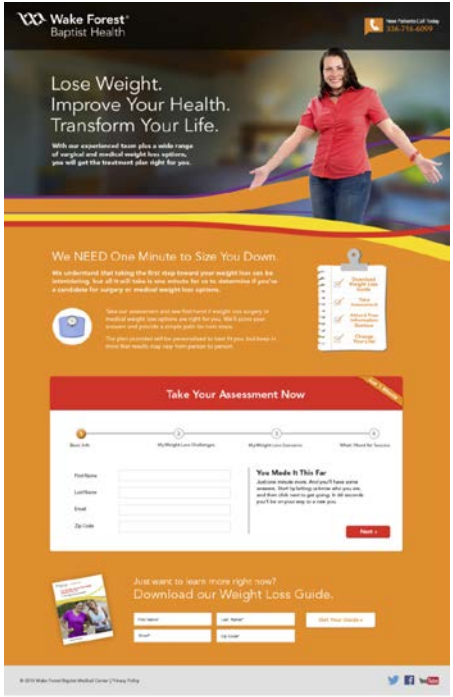
Acquisition Landing Pages



Weight Management

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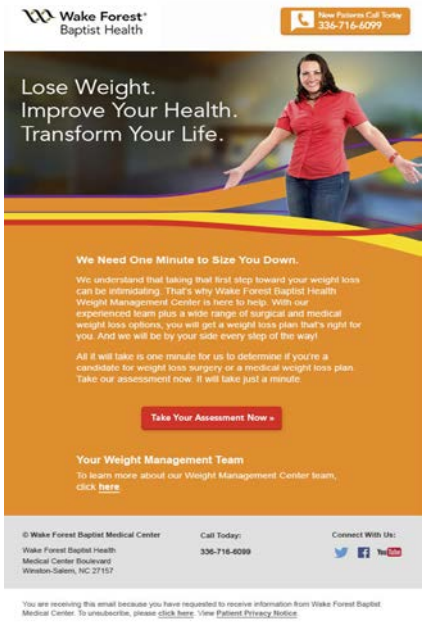
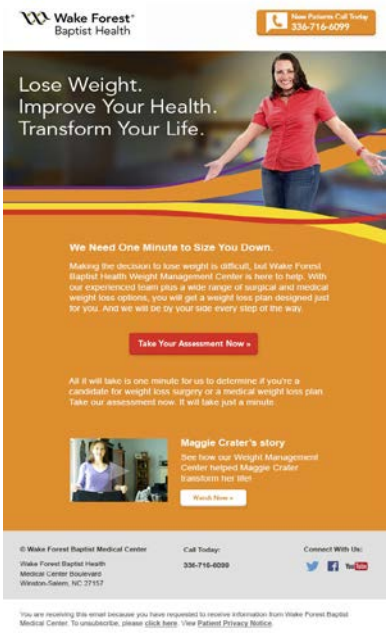
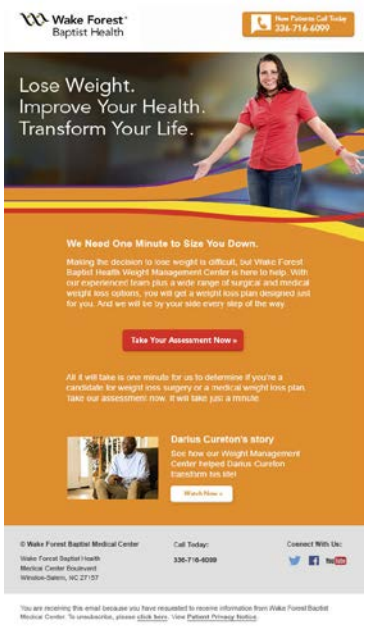
Lead Nurturing Emails



1 Week Post-Acquisition



3 Weeks Post-Acquisition



5 Weeks Post-Acquisition

Nurture for Acquisition

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4 Campaigns

	Total Leads	Direct Appointments	Leads to Nurture for Acquisition
Bariatrics	1,765	249	1,516
Orthopedics	825	61	764
Campaign B	161	29	132
Campaign C	278	0	278

Total Appointments	339
Total Leads to Nurture	2,690
Leads to Nurture Ratio	8:1

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Final Thoughts

Best Practices Operations

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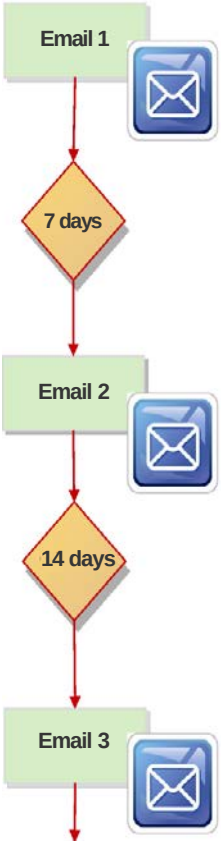
- Budget 50K – 200K depending on features and # of users.
- Need at least 1 resource dedicated to MA. Not shared!
- Plan on integrating MA with CRM and perhaps even CMS.
- Work with system ops immediately on lead flow/quality.
- Map every service line patient journey. **ABSOLUTE MUST!**



Q&A + Contact Information

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