

The Next Realm of Health Care Marketing

by Gabrielle DeTora, Health Care Marketing Strategist, DeTora Consulting

Although customer relationship management (CRM) has been around for over 20 years, only in the past five years has this marketing technology emerged as the new centralized hub of sophisticated healthcare marketing. Some consider CRM mass personalization. However, CRM allows a marketer to micro target campaigns and reports so specifically, one can track every individual prospect. This becomes invaluable when health care marketers are continually required to do more with less. They are battling numerous challenges, including increased competition, fewer resources and a dynamic landscape. By creating intelligence platforms and targeting highly directed campaigns, marketers are using fewer dollars to gain greater revenue.

Many Fortune 500 corporations have embraced the CRM; however, hospital marketers are now just starting to understand it and tap into its true potential.

In the past, marketers would conduct mass media and direct mail campaigns in order to drive traffic to the hospital website, generating inquiries about services and events. Now, marketers can follow up with potential patients for all inbound inquiries through automatic routing from Web, call centers and manual entries. They can report patient conversations by service line, department or type of request. By using sophisticated techniques, these CRM systems can even predict health outcomes and trends in behavior by analyzing health care variables and co-morbidities associated with disease states of both patients and non-patients alike.

There is a huge amount of data that flows through our healthcare facilities every day. The entire point of CRM systems is that they provide the ability to harness that data and enhance it with propensity models to build insights. It is these insights which make us more strategic and effective marketers. Moreover, CRM allows marketers to build two-way communications. Old school CRM was literally just a glorified marketing database where people would pull a list and wait for results. It is now about real time engagement and building relationships that can be tracked both online and offline.

Health care marketers now have the opportunity to plan, budget, track, and optimize campaigns with greater efficiency and accuracy. Web analytics, interactive marketing, offline marketing, call center and many other touch points intersect. Marketers can cross-reference all marketing initiatives -- traditional and non-traditional -- to glean insights from results for future planning. Advanced CRM modules enhance the patient caller experience by linking individual calls to patient records, pulling up

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records by caller (phone number) identification. They can even link a referring physician to a patient for reporting purposes and integrate with marketing reporting to reference the campaign source.

Additionally, a CRM system can be integrated with the hospital's backend data on every track-enabled marketing campaign to report downstream revenue and ROI. Marketers can create reports demonstrating finance results from campaigns by tying patients to actual encounters and further break down the results by DRG and ICD-9 codes. Marketers can measure volumes and revenue breakdowns from marketing campaigns by service line or by physician/ physician group.

Customer Relationship Management

CRM is an information industry term for methodologies and software capabilities which assist marketers to identify and target their customers, manage marketing campaigns and generate profitable service line business. This is done by identifying individuals who will actually use specific hospital services and are more profitable patients. It is basically the opposite of mass marketing. An individual record in a CRM system can contain a deep profile on each patient or prospective patient that captures touch points for a complete historical snapshot. This snapshot includes both offline interactions (such as calls to a call center, as well as online visits), by tracking Web activity, social media, SEM, chat, portals and e-mail. A sophisticated CRM automatically captures and stores demographic data, propensity scores, website and mobile inquiries, call center interaction, patient history (when possible) and revenue. It also provides predictive modeling, patient lifecycle trends, tracking and reporting.

Most CRMs are automated and allow for marketers to build service line, screening, and new movers campaigns based on demographics, geography, insurance, propensity models and other alignment categories. They will integrate all website, microsite, landing page, form, event registration and contact request activities into one report in order to understand that customer's interests. This allows marketers to develop highly-targeted campaigns.

Using CRMs to plan and forecast is the key to unlocking business analytics for your hospital and health system. By forecasting volume and revenue at multi-year intervals, combined with demographic assessment and current state, marketers can generate analytics which provide insights to growth opportunities. With various data elements, marketers can predict changes in volume, utilization and revenue associated with their planned campaigns.

Physician Relationship Management

Physician relationship management (PRM) helps marketers and physician liaisons identify high-value physicians (providing more referrals), so they can cultivate those relationships and analyze the dynamics of their interactions. Marketers can then invest in the most cost-effective, value-driven physician outreach initiatives.

PRM systems can help determine referral patterns and splitter behavior, manage physician contacts and measure ROI. Many PRM systems offer pre-populated lists, including practice group locations, physician education information, specialties, areas of interest, languages, accepted insurances and labs. More sophisticated systems offer reports on call center referrals, revenue, and activity logs such as calls, digital use, chat and e-mail interaction.

When selecting a PRM system, look for one which is fully integrated. Tasks and event calendar should integrate with Outlook, Lotus Notes and Groupwise, and manage follow up with automated reminders, e-mails, call logs and notes. The individual or personalized mass e-mail marketing capability should be built-in. Subscription management, text messaging, website landing pages and mobile access and tracking are a plus. And it is essential the resulting physician referral, utilization metrics, and referral reports are included in the solution.

Once again, the goal is integration. Having access to the core data in the CRM system should include the ability to use tools such as mail merge as well as field merges in real time with programs like Excel and Word. Marketers have the ability to follow up with physician e-newsletters, CME programs and automated notifications of new physicians and services.

For both CRM and PRM, ideally marketers should be looking to capture two-way communications, keeping track of both inbound and outbound communications, including the effects of those communications. The chosen system should allow marketers to build reports and dashboards, including graphical charts and mapping. It should provide summary as well as matrix reports, and export into a number of formats. At minimum, reports should include patient acquisition, physician referral, call center statistics, activities and events and custom reports as needed.

The system must be HIPAA compliant and should also be equipped with a multi-tier security model that protects sensitive data through custom application permission, and utilizes safeguards to manage an approval process which prevents data changes, contract submissions and other system updates without necessary review and approval.

Marketing Automation at Work

Marketing automation delivers a user interface that enables marketers to set up, review and send marketing campaigns via e-mail, print-on-demand, text messaging, fax, call-on-demand and through RSS Feeds. Marketers can also create personalized HTML pages (PURL) for other digital and mobile initiatives.

E-mail marketing platforms can allow marketers to create, upload, edit and manage HTML e-mails, manage contacts, deploy batch or individual e-mails on demand, or schedule a drip campaign over a longer duration, as well as test and report e-mail addresses for accuracy.

Marketers can use directed messaging to engage past and prospective patients more effectively, and automation allows for customized messages that drive higher conversion ratios.

Depending on the CRM platform, the marketing automation can produce propensity modeling, which automatically ranks prospective patient inquiries according to their demographics, socioeconomics, and behaviors using qualification technology. This allows marketers to force-rank prospects by those more likely to need individual services or those who would be more likely to be at-risk of specific health issues. This added step targets a campaign for more effective resource allocation and improves conversion rates.

More savvy marketers may separate out more qualified potential patients for campaigns through propensity modeling, while simultaneously transferring disqualified candidates into a longer-term nurturing program designed to cultivate patients over time through direct mail, newsletters, event invitations and other marketing efforts.

Advanced systems can create dynamic landing pages, which auto-populate based on certain keywords utilized and activity-driven content to replace sections of the page with customized words, content and images based on a user's search term or demographics. This allows marketers to gain higher relevancy to increase landing page quality, thus directly affecting the keyword quality score. It also improves visitor targeting of the landing page content, resulting in greater conversions and ROI, as well as the ability to create unique ads, matched specifically to the landing pages. This ultimately saves time and money and generates higher returns.

Bring your hospital marketing initiatives into a new realm of prospect and patient communication with the help of CRM, PRM, and marketing automation. Although there are very few vendor partners whose platforms encompass all of these deliverables, partnerships can be formed when it is necessary to piecemeal. However, this is the ideal goal they are all working towards. It is truly the next realm of healthcare marketing. These systems go well beyond simple direct mail with a dedicated call-in line. They are a sophisticated integrated hub for all marketing touch points, and help marketers to know their potential and active patients and physicians, as well as anticipate their needs in order to increase hospital admissions along with the bottom-line.

A Few Quick CRM/PRM Campaign Tips:

Targeted Patients and Prospects – Healthcare utilization is highly segmented. The more targeted you are, the more successful your campaign will be.

- **The Compelling Offer in which Your Prospects are Interested:** This may seem obvious, but it is a step many people overlook. Spend time researching target interests and data-mining to match targets with messaging. Think about what prospective patients would want and more importantly, what would motivate them to take action.
- **Sales Copy that Sells:** Although health care marketers have an ethical obligation to ensure patients are informed, the biggest mistake marketers make is to launch beautifully-designed campaigns which inform their audience about what the hospital wants them to know, rather than “selling” prospects.
- **A Strong Call-to-Action:** It sounds simple, but you must tell campaign recipients what you want them to do. Ensure (in advance of the campaign launch) that the call-to-action will be auto-tracked, reported and measured against the objectives of the campaign.
- **Multiple Lead Capture Formats:** If possible, give prospects multiple ways of performing the call-to-action (i.e., online scheduling, e-mail for an appointment, call for an appointment, etc.)
- **Testing for Perfection:** Test and track everything you do with CRM or PRM initiatives. You need to identify what lists give what response, what postal/e-mail days give the optimum result, and which mailing message/ style is the most effective. If you test, track and report, results will get better with each campaign. Campaigns can go from losing money to being massively profitable based on knowledgeable testing.

About Gabrielle DeTora

Gabrielle is a healthcare marketing strategist with nearly two decades of executive experience and a proven track record of driving ROI. Gabrielle has worked with the CEOs and leadership teams of nearly 50 health systems, representing over 100 hospitals nationwide. She has served as the strategic leader for health systems, brand marketing agencies, and consultancies.

Earlier in her career, Gabrielle served as the Vice President of Health Strategy for a major advertising agency. There, she oversaw all strategic business planning, branding, marketing, and execution for more than a dozen large healthcare systems, healthcare organizations, and insurance companies.

Her past experience also includes top executive strategic planning and marketing roles at St. Joseph's Healthcare System, Hunterdon Healthcare System, the Cure for Lymphoma Foundation, and the Leukemia & Lymphoma Society. This deep experience gives her a keen understanding of the healthcare industry, which she uses to deliver highly effective strategic marketing plans for her clients.

Beyond the work Gabrielle conducts for her clients, she is also called upon regularly to speak at national healthcare conferences, and is a regular contributor to a variety of healthcare publications. Gabrielle has an MBA from Kennedy-Western University and a BBA from the Zicklin School of Business (CUNY).

Interested in taking the first step in CRM/PRM marketing?

Contact Gabrielle at gabrielle@detoraconsulting.com or 908-447-9231 to learn about the processes and strategies involved in gaining consensus among hospital leadership, bringing on the right partners, integrating your data platforms, and training your team to maximize your results.

Connect Online

www.DeToraConsulting.com

www.linkedin.com/in/gabrielledetora