

The Five Ps of Consumerized Healthcare

Converting Challenges Into Opportunities

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Consumers are looking for solutions and providers that understand and address their needs.

Introduction: A Call to Action

The role of the healthcare marketer has been transformed.

No longer will billboards, print ads, and focus groups be sufficient, because modern consumers of healthcare — along with the expectations and power they bring — have forever changed.

Moreover, if evolving customer expectations were not sufficiently daunting, accelerated market dynamics, increased competition,¹ and exploding advances in technology have conspired to put healthcare strategists, marketers, and technologists on an increasingly faster roller coaster.

But with these changes and challenges comes unparalleled opportunity. As in any market transformation, consumers are looking for solutions and providers that understand and address their needs. Managed effectively, such challenges become opportunities for growing market share, creating memorable patient experiences, and reducing the cost of customer acquisition. Furthermore, modern marketing technologies provide a level of measurement fidelity and attribution not achievable through traditional marketing methods.

We believe that five foundational elements define the domains healthcare marketers must conquer to sustainably win in this environment:

1. **Patient-centered.** Websites and other marketing content can no longer consist of endless menus and images of big buildings — it's all about the customer and their needs.
2. **Prompt.** Information sought by consumers must be accessible in four clicks or fewer; response to consumer need should be appropriate to the request; and encounter experiences should be streamlined as much as possible.
3. **Personalized.** Messages must be targeted, valuable, aligned with individual needs, and delivered in a manner the consumer desires.
4. **Pathways.** Marketers must help drive frictionless, memorable experiences and foster the customer journey through natural, streamlined facilitation.
5. **Portable.** Access must be expanded and services must be lifestyle-aligned, incorporating modern, mobile-enabled capabilities that are increasingly important to consumers.

This paper will provide in-depth insights regarding these redefined “Ps” of modern healthcare strategy, marketing, and technology. We will cover specific ways to leverage both existing and emerging technologies to convert apparent challenges into breakthrough opportunities. We will also provide concrete steps that outline a practical road map for transformation in the face of constrained budgets.

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As well as *coopetition*, defined as “collaboration between business competitors, in the hope of mutually beneficial results.”

The Modern Consumer

Before we launch into our playbook for healthcare marketing, let's examine our audience — the modern consumer of healthcare. Here are some relevant facts illustrating that patients are consumers and are starting to act like it:



43% of patients report looking online for information about treatment options



28% say they searched online for information about the quality of care provided by a primary-care physician or medical specialist



1 in 5 reports searching online for information about the costs of services



1 in 10 says they used social media to comment on their experiences with a healthcare system



Over half say they would use a smartphone to monitor their health if they could access their medical records and download information about their conditions and treatments



2 in 3 say they would consider switching to a physician who offered access to medical records through a secure internet connection

These facts demonstrate that gone are the days when marketers exclusively controlled the brand message through the foghorn of mass media and other forms of marketing spend. The dramatic increase in transparency brought about by information availability — whether in regard to quality, price, procedure volume, or physician reviews — has resulted in a permanent shift in power from business to consumer, as peer influence and smart search have taken over as core decision drivers.

Needless to say, customers now have profoundly different demands and needs, largely due to the expectations that have been set by industries such as retail, hospitality,

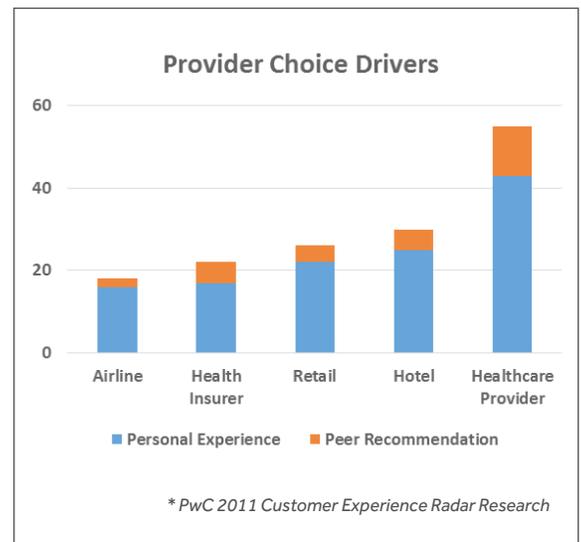
and financial services (all of which overlap with healthcare in the customer-provider relationship). Examples of how these markets both drive and portend the future of healthcare marketing include:

- Online purchasing and appointment scheduling platforms in all forms of retail — everywhere from auto repair to haircuts — offer consumers 24/7 access to services.
- Hospitality industry leaders are providing unprecedented conveniences to the weary traveler, eliminating check-in lines through “straight-to-room” routing and offering preordered food and beverage waiting in the room upon arrival.
- Financial service providers have simplified digital payments through the conveniences of online bill pay, fingerprint security, and emerging digital wallet capabilities.

One additional aspect of healthcare marketing that warrants attention in reference to other consumer industries is “peer referral.” While many health systems have physician relations departments in place for doctor-to-doctor referral, few have explored the need and opportunity to foster peer referrals and recommendations as a source of new patients.

As depicted in the graph to the right, personal experience and peer referral are far more likely to drive provider selection in healthcare than they are to drive preference in non-healthcare consumer industries.

However, non-healthcare industries spend billions of dollars annually to drive exceptional experiences and foster peer referrals, while healthcare providers invest comparatively limited resources to capitalize on these drivers in spite of their powerful influence.



Market potential is often measured as the gap between customer need and available solutions. Very few business opportunities provide such a clarion cry for change as those identified for healthcare marketing throughout this document. We will next explore the path forward for progressive healthcare marketers as implied through the proxy indicators of non-healthcare consumer markets.

Learning From Other Consumer Markets

While it may sound trite, we believe the transcendence of consumer expectations is best captured by the phrase “Patients are people too.” The concept in play is that consumer expectations from non-healthcare verticals are an accurate proxy for healthcare, as the consumer is common across all markets. All of us have endured the frustration of rushing to make a doctor appointment, only to wait for extended periods to actually meet the physician. Technologies now exist both inside and outside of healthcare that foster more accurate scheduling and that can alert customers to potential wait times and scheduling alternatives.

Numerous market leaders outside of healthcare have demonstrated the power of creating memorable experiences for their valued customers. As depicted below, while each of the rows represent competitors within a common category (such as consumer electronics for Apple and Dell), the power of the experience created by the providers on the left so outstrips the experience provided by those on the right that we almost do not consider the two companies to be competitors.

When we unpack the differential experience and brand interaction delivered by providers in the left column, patterns emerge.

First, consumers value convenience, and are often willing to pay more for it. American Express is considerably more expensive than a standard credit card, yet is able to earn this fee differential by offering valued privileges such as travel lounge access.

Second, consumers value a predictable experience. While not depicted above, Southwest Airlines has captured considerable market share by providing a predictable, yet no-frills, experience.

Third, consumers value an intuitive digital experience. Apple has dominated the market with its consumer-friendly interfaces.

Opportunity for similar differentiation exists within healthcare. Early versions of this are illustrated in two concrete examples: (1) Consumers are rapidly enrolling in telehealth programs to achieve 24/7 access to healthcare; and (2) both Walgreens and CVS have gained considerable



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market share for basic medical services such as prescriptions and immunization by offering expanded hours, neighborhood convenience, and simplified “check-in” relative to more traditional primary-care practices.

Taking it a step further, CVS has actually advanced the concepts of the five Ps of healthcare marketing considerably, putting nearly every principle to work. The company is in the process of rolling out curbside pickup for orders placed online. CVS uses mobile technology to geo-detect the customer’s arrival in the parking lot, and then promptly brings the order out to the car. Using the domains of the five Ps, this service breaks down thusly:

- 1. Patient-centered.** CVS targets the busy customer (who isn’t?), and likely the medical mom (kids in car seats) to address key value drivers of these attractive audiences. Furthermore, online ordering offers CVS the ability to record customer product interests in its database.
- 2. Prompt.** The fact that the order is brought out to the customer “immediately” upon arrival demonstrates CVS’s recognition of time and convenience as important to its customers.
- 3. Personalized.** Mobile technology allows CVS to identify a specific customer’s arrival.
- 4. Pathways.** Journey management is alive and well in this example, given the sequence of events CVS has streamlined to address a customer’s need (time, convenience, not feeling well, kids in the backseat). From order through delivery, CVS brings it all together.
- 5. Portable.** Clearly, portable is in play with the geo-detection of the mobile device’s arrival..

While CVS’s curbside delivery may seem highly sophisticated and out of the reach of most health systems, it is actually not difficult to implement with modern platforms. A similar capability is already on the road map for Tampa General, leveraging the health system’s customer-friendly mobile platform and integrated master customer database.

Finally, the foundational principle of customer lifetime value captures the essence of effective marketing to the modern healthcare consumer. All too often, healthcare marketing is focused on a single encounter. While important for customer acquisition, this misses the idea of capturing a larger share of wallet (more services over a longer period of time) and the marketing activities that would position the health system to earn this larger share. The principle of customer lifetime value invites questions such as:

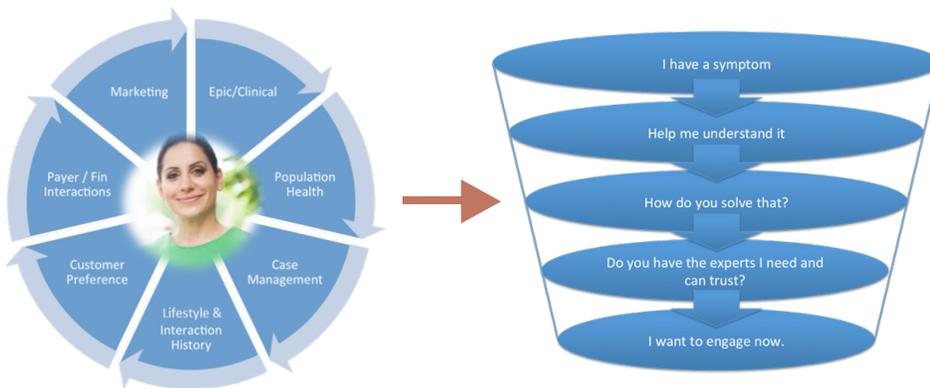
- What are we doing in healthcare to become part of the customer’s daily lifestyle?
- How can we capitalize on the power of referral?
- How can we attract the “medical mom” into our health system?

This mind-set fosters the notion of personalized experiences, mobile apps (portability), and patient-centered solution development as a means of unlocking the potential for capturing greater lifetime value.

With a solid understanding of the need for change and what our customers expect, let’s now explore the five Ps of modern healthcare marketing to gain a command of these new principles and how they offer us as marketers the potential to unleash incredible power.

The First P: Patient-Centered

Customer relationship management (CRM) places the consumer at the center of everything you do. The essence of CRM is to utilize the totality of data available to identify targeted audiences and communicate with them in the most meaningful, relevant, and personalized ways, at the times they have the greatest need, and in the manner in which they want to receive the information, ultimately resulting in behavior change. This data-driven strategy is more cost-effective and efficient at moving a consumer through their decision journey than are traditional marketing techniques. When CRM tactics are performed correctly and executed with the right technology framework, every component can be tracked and measured, resulting in statistically significant return on investment (ROI). Ultimately, when effective data management allows a health system to glean actionable insights, it positions the organization to assist a customer in their care decision journey, as depicted below.



To make your CRM strategy actionable, a powerful CRM platform must be in place. CRM platforms form the foundation for healthcare marketers to understand their customer base, measure market opportunity, target specific audiences, activate channel-specific interventions, discern campaign attribution, calculate conversion effectiveness, and, ultimately, drive ROI for scarce marketing funds. When exploring CRM platforms, at a minimum consider the following.

1. **Data, data, data.** A CRM strategy is by its very nature data-driven, so the platform you choose must have a sophisticated, yet flexible infrastructure that can evolve over time as the market evolves. The goal is to use data to build the most complete 360-degree view of consumers in your market as possible to use insights from that data to influence behavior and achieve targeted outcomes. Critical components include:
 - a. **Data ingestion.** Data ingestion is the ability to consolidate data from any hospital or health system source (clinical, web, financial, foundation, call center, etc.) and to do so in a customizable fashion. Additional accuracy, data integrity,

and insight are gained by including third-party information to complete the story on an individual or audience.

- b. Data fusion.** Data fusion is the aggregation of all data sources into one single source of truth, accomplished by leveraging rigorous data hygiene protocols, combined with tools and processes that enable high-accuracy record matching.
- c. Data maintenance.** Regular data maintenance includes updating, cleansing, and scoring your data at a frequency that complements your strategy. Automation of data feeds from all sources is used to make data available and actionable with little to no dependence on scarce IT resources.

2. Targeting and segmentation models. A successful CRM strategy is predicated on the ability to identify specific target audiences and then segment those audiences to create personalized experiences, ultimately driving behavior change. Access to data regarding previous shopping behaviors, magazine subscriptions, and other lifestyle activities does provide richer insight regarding important customer attributes, and consumer-reported interests and preferences further complete the story. But paramount for healthcare marketers is data modeling (and in particular, clinical modeling), which can enhance known data and extrapolate your customer insights through “look-alike” data science methods. Data models build encounter data and other information into the story, to give you a picture of a consumer’s actual health history and propensities for particular conditions. Examples of such models include:

- a. Clinical predictive models.** The core of your target audience selection approach should be to identify those individuals with the highest probability to convert. In healthcare, this means identifying individual consumers who have the greatest need for your services and reaching them in a manner aligned with their preferences and interests. Clinical predictive models combine demographic data and health history to predict the propensity for consumption of specific health services over the next 12 to 18 months.
- b. Payer models.** In healthcare, net revenue and reimbursement are the health system’s lifeblood. Payer models identify individuals with the greatest ability to pay, so you can spend your finite marketing dollars on the greatest opportunities for reimbursement. This profit stream provides the financial headroom for the health system to also serve those less capable of paying, such as the uninsured or underinsured.
- c. Behavior models.** Insight into customer behaviors both inside and outside of healthcare positions marketers to understand a consumer’s relationship with the health system, so that customer messaging can be tailored to specific needs and attributes.
- d. Psychographic models.** Psychographic models are used to understand how each consumer prefers to receive their healthcare information, to cut through the clutter and increase the probability for message fit, response, and conversion.

- 3. Insights.** Data is useless unless it can be made actionable. An intuitive platform interface and experts to support complex marketing interventions are both paramount for achieving healthcare marketing goals.

- 4. Integration and marketing automation.** Your CRM platform must be able to integrate with other technology solutions through bidirectional data flow within the cycle time necessary for achievement of specific interaction needs. This integration and interoperability spans multiple functions, including: data collection, opportunity analysis, real-time personalization marketing automation, and clinical intervention — all part of creating customer engagement and nurturing consumers along their decision journey.

- 5. Tracking, measurement, and reporting.** A CRM platform must provide detailed analytics regarding activity, encounter conversion, and financial performance in order to validate marketing effectiveness. These must be performed through statistically valid ROI calculations, moving marketing from a cost center to a profit center.

Finally, the closed-loop process inherent in CRM allows for the continual feeding, scrubbing, and scoring of data for real-time insights to inform business decisions beyond marketing strategy. These insights may identify opportunities regarding market expansion, physician alignment, population health management, patient acquisition, and of course, patient engagement. Patient centrality is fundamentally based on a robust CRM strategy and platform.

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The healthcare industry is showing early signs of acknowledging the tectonic compression of time as evidenced by the emergence of urgent-care clinics, telemedicine, and home monitoring.

The Second P: Prompt

Countless examples abound regarding the growing compression of our calendars and the ripple effect these frenetic activity levels have on nearly every aspect of our lives. Mail has been replaced by email. Phone calls have been replaced by texts. Social gatherings are being usurped by Facebook. Skype and FaceTime are becoming a replacement or supplement for travel.

The commercial world has reacted to this shift through a number of strategies and tactics. Amazon and other ecommerce solutions are in the process of destroying brick-and-mortar retailers. Who could have imagined even five years ago that Walmart's business model would be imperiled by what started as online book shopping? Even online orders themselves are being time- and click-compressed to enable reordering, retrieval of personal/billing information, and free next-day shipping, all to obviate the need to visit the local store.

While slow to react, the healthcare industry is showing early signs of acknowledging the tectonic compression of time as evidenced by the emergence of urgent-care clinics, telemedicine, and home monitoring.

Our point of view is that time will forever remain an opportunity for differentiation; it is unlikely that consumers will enjoy any pace abatement in their already hectic lives. Just as importantly, most healthcare providers are probably ill-prepared to compete on cycle time. That gap in need versus available solutions provides an opportunity the new-generation marketer can capitalize on.

There are two key domains for healthcare organizations to address relating to the time dimension. Specifically:

1. Time to access information, as well as time to "sign up" for services
2. Time to receive services

The first time dimension of information access and service enrollment is directly under the control of healthcare marketers — or at least, directly within their sphere of influence. Examples of this opportunity include: reducing time to find information on a website; patients receiving confirmations and prompts in real time or near real time; providing mobile-enabled information access at the tap of an icon; and providing the ability to schedule appointments 24/7 online or through a mobile app.

Many healthcare providers have large, complex websites where the primary drivers of content placement are the physicians and service line leaders. This Frankensteinian approach to content strategy is analogous to a grocery store where the proprietor crams product onto the shelves based on what Pepsi, Coke, and Frito-Lay wish to promote.

The purpose of a website is twofold. It should: (1) foster rapid, effective access to premier content to earn trust with the consumer and hopefully convert the site visit into an appointment; and (2) capture information about site visitors and their site journey patterns to improve content access and conversions for future site visits. While a health system

may certainly desire to promote various content, the ultimate goals must be to address consumers' information needs and increase conversions.

This desire to match content to customer need carries an urgency in that the modern website visitor is increasingly unwilling to click around until they find what they need. The fact that over 90% of Google searches never go past the first page is evidence of this fact, as is the shrinking time on site and dwindling number of clicks per visitor for most health systems. The general rule of thumb is that if a web visitor has not found their content within five or six clicks, they are likely to search for alternatives. As a consequence, the website paradigm has shifted from one based on complex menus to an emerging model in which the first goal is to identify customer need within three clicks, and then to rapidly place targeted, personal content at their fingertips from that point forward.

Reduction of the time needed for the website visitor to locate relevant content can also be achieved through a combination of proven, cost-effective approaches:

- Writing content to optimize for search engines (SEO) increases the likelihood that content is written for the audience and matched to common search terms.
- Leveraging dynamic landing pages (DLPs) routes site visitors directly to the page of interest, rather than having everyone come through the home/main page.
- Properly tagging content improves on-site searching and also positions the organization for personalization technology.
- Personalization technology — spanning web, mobile, social, and marketing automation — places content of high interest for each customer (or persona) within each communication vehicle.
- Underpinning the website with a CRM database captures information about each site visitor and increases the probability of content matching for current and future visitors.

Turning to the second key time domain for healthcare marketers, that of reducing the time to receive service: The adoption of technology that naturally fosters the customer journey of “find a doctor → schedule an appointment” is recommended. This can be done through EMR booking technology, emerging integrated mobile-app platforms, and premium vertical-search sites such as healthgrades.com. The timeline on payback for investments in this class of solutions is often less than six months, and has been known to drive millions in incremental revenue depending on scale, capacity, and market competitiveness.

As we will discuss within the “Pathways” section of this document, yet another differentiation opportunity involves the role marketers can play in streamlining encounters by stripping out process complexity, frustration, and time, both before and after an encounter. Emerging solutions directly target this time domain, including examples such as:

- Pre-encounter: Online/mobile forms, mobile-enabled wayfinding, insurance card scanning, and pre-arrival co-pay
- Post-encounter: Simplified prescription renewal, follow-up visit reminders/calendar entries, and even medication delivery as an add-on service

Generalized offers, messages, images, and promotions are commonly perceived as either boring or sometimes even an offensive waste of time for the recipient.

The Third P: Personalized

There is considerable evidence, particularly in non-healthcare consumer markets, that customers are far more likely to respond to information targeted to their interests than that which is more general in nature. Depending on the market, offering, or individual, response and closure rates for personalized marketing tend to provide lift of 10% on the low end, to an upper end as high as 500%. In fact, some existing healthcare personalization initiatives are on trajectory for driving an incremental revenue stream of \$1 billion.

Conversely, generalized offers, messages, images, and promotions are commonly perceived as either boring or sometimes even an offensive waste of time for the recipient. For example, an email from a hotel that encourages me to travel to an area where I have no interests, family, or emotional connection will at least result in a non-response, if not a full-fledged unsubscribe.

Healthcare brings to bear a number of unique considerations that reinforce the use of personalization, but with a few important twists. Clearly, HIPAA imposes a number of important — and appropriate — boundaries on data-driven personalized interactions. On the other hand, it is not difficult to conclude that medical science is on the trajectory of delivering personalized medical care through genomics and other increasingly precise approaches.

In the case of healthcare marketing, a multitude of approaches are emerging that open the landscape of consumer marketing to an entirely new genre of messaging and interactions. Our goal is not to provide exhaustive coverage of this topic, but rather to highlight several scenarios for directly applying the principles of personalization. Prior to a use-case examination of personalization, it is important to explore the two key components that drive the impact and effectiveness of this model.

- 1. Depth of knowledge.** The effectiveness of personalization is closely coupled to the richness of data available regarding a person, their circumstances, the environmental context, and ideally the competitive playing field. The traditional approach to this concept is to purchase a CRM platform and conduct offline analysis using models to compute propensity scores against a variety of dimensions, such as likelihood to visit a new primary-care physician. While this is clearly a step in the right direction, health systems will enjoy substantially greater benefits by viewing a CRM platform as a master database operating in real time across all customer touch points. When a CRM platform is used this way, all interactions — through mobile devices, web portals, the call center and clinic, and even at admissions — can be informed by data-enabled awareness of each patient's individualized needs, with the master customer database serving as the foundation to make it happen. This greater level of attention ultimately helps establish a stronger relationship with the consumer.
- 2. Breadth of application.** Closely coupled with depth of knowledge is the notion of breadth of application. This component denotes the circumstances in which and channels through which the organization is able to apply data-driven, personalized

interactions. Said another way: Greater reach is gained by enabling personalization across many channels (web, mobile, email, text, print, in person), as well as across many scenarios (find a doctor, schedule an appointment, refer a friend, renew a prescription, etc.).

The combination of depth and breadth sets up a multiplication formula of sorts concerning the richness and efficacy of personalization. We have coined the term “bingo card” to illustrate this concept in some of our work. As depicted below, the goal is to pick the highest-value (and lowest-cost) combinations of depth and breadth for delivering personalized interaction to a given customer segment. Strategic marketing would then own a road map that optimized the population of the bingo card to the highest combination of ROI. For example, the green items on the bingo card might be considered the best place to start for Phase 1, with the yellow items planned for Phase 2, targeting post-care relationship cultivation.

		Breadth of Application (moment of truth utility) →			
		Web Site Visit	Mobile Appointment Scheduling	Between Visit Concierge Care	Renew Prescription
Depth of Knowledge (Data availability) ↓	Medical History	Logged in “member” linked to EMR record		Blood sugar tends to rise when “x” occurs	
	Current Circumstances		Travelling near PCP clinic in the rain		Unable to secure transportation to pharmacy
	New or Existing Patient	Previous page views or searches			
	CRM Persona (Medical Mom)			Are Johnny (and siblings) recovering well?	

This bingo-card approach highlights the optimal-capability road map that the supporting technologies should deliver to maximize journey management for the customer. We will provide additional insight on the bingo-card planning method in the final section of this document, related to “making it happen.”

Finally, personalization can take a number of different forms, including examples that begin to blend clinical and nonclinical marketing interactions. Capturing mobile-app pedometer data or integrating health device data, such as that from a Fitbit, affords many lifestyle-aligned touch points for a health system to foster trust and secure share of mind. Mobile also introduces countless “real-time” opportunities that leverage location, motion, or social information delivered by the device.

The Fourth P: Pathways

Let's take a minute to reflect on our themes thus far. We have covered in detail the concept of being patient-centered and putting the consumer at the center of everything you do, from communications to patient treatment. We have also identified the value of being prompt, recognizing the constant compression of time and consumer demand for simplification. Personalization has taken on new meaning, with the advent of technologies that allow marketers and consumers to connect 1:1 across all channels, creating brand experiences and bidirectional engagement throughout the interaction process.

Perhaps your health system has begun to dabble in one or all of these areas. You may even be an expert, a driving force, who has taken on the daunting task to overhaul your culture, structure, and technology to stay ahead of the curve. The question is: Where do you begin in order to bring these three components together to drive frictionless, memorable experiences? You must start by understanding the pathways by which your consumers find, select, engage with, and return to the health system.

The first pathway to master is often the consumer buying journey. As strategic marketers, technology experts, and leaders, we are all familiar with the proverbial consumer engagement journey. Whether the journey has four, five, or six stages or the stages themselves have different names, the essence of the journey is the same: The customer relationship begins with awareness and proceeds through consideration and engagement. Successful service delivery and experience creation foster trust and brand loyalty, ultimately cultivating advocacy for years to come.

AWARENESS

CONSIDERATION

ENGAGEMENT

SERVICE

LOYALTY

Any healthcare marketer or strategist aiming to understand how the consumer journey has changed ought to now consider it through a "patient-centered" lens. Look at the journey not only across your brand and across each service you wish to promote, but also from the consumer's perspective.

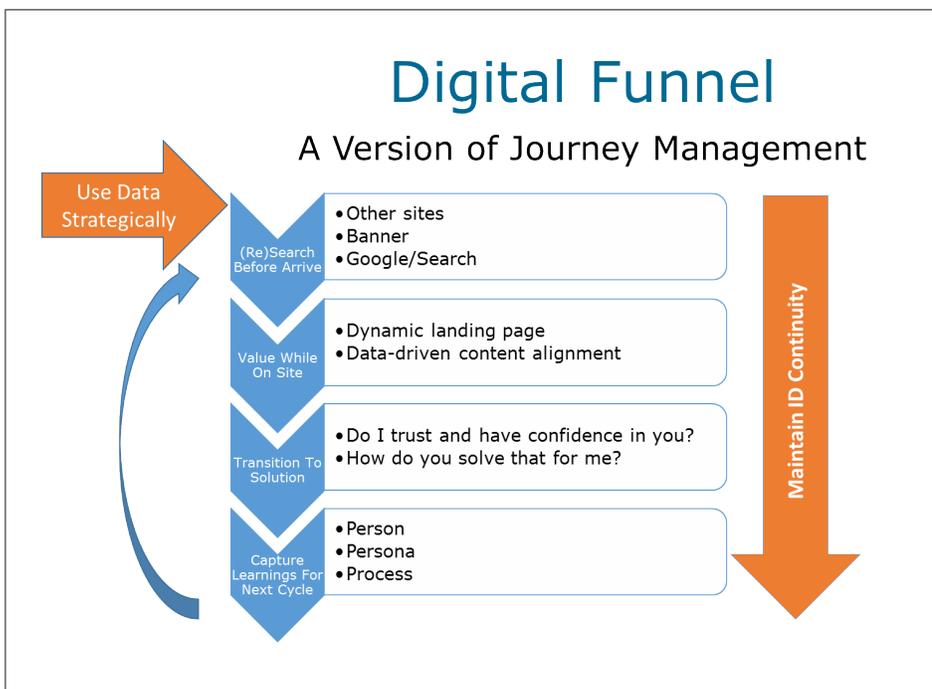
Take your neighbor and friend Erin, for example. She is a young professional who is happily married, with two beautiful children. She has selected you as her healthcare system of choice, from her wellness visits with her primary-care physician, proceeding through her maternity care and the birth of her children. Erin now brings her entire family to you for all of their healthcare needs, and has ideally referred her friends and family to the doctors she has grown to know and trust. She is certainly familiar with your brand and likely knows the services you offer.

But what happens when an unexpected healthcare need arises? Sure, she may speed-dial the pediatrician for urgent matters with her children. She may even log in for a telehealth session if that pesky sinus infection doesn't seem to subside with home remedies. But what about that annoying abdominal pain that just doesn't go away? Is it serious enough to call

her doctor? She doesn't have time to take off work. Erin does what millions of consumers do every day: she searches for an answer online.

Mastering the digital pathway and recapturing Erin's business and the business of those like her is imperative, if your health system wants to survive healthcare's transformation to consumerized marketing. Gone are the days of simple ad placement and generalized keyword campaigns. Digital marketing must be crafted with the consumer in mind, delivering valuable, personalized content that is relevant to individuals and where they are on their personal journeys.

The graphic below is one example of the digital pathway. At first glance, this may seem a bit elementary. The arrows on either side of the funnel are the linchpin to making the digital journey patient-centered, prompt, and personalized. The key is to use data strategically to inform every step through the digital funnel, engaging with your consumers in real time, in meaningful ways that foster brand trust and provide additional insights into customer interests and needs.



To shorten the time from awareness to conversion, marketers must integrate the digital pathway through a robust CRM platform. The CRM platform will provide key data insights to inform each step of the pathway. This data can also be used to develop personas, which are a vital way of personally connecting with the unknown website visitor. Personalization engines within the content management system are then able to deploy persona-targeted content that is relevant to consumer activity on the site.

Effective targeting of content fosters customer trust and increases the probability they will share valuable personal information, such as interest, preference, or their email address

through class registration or form completion. This approach unlocks what is often called “permission-based marketing,” ultimately equipping the marketing automation system within the CRM platform to begin two-way conversations that nurture customers through their decision journeys. A key goal is to eventually convert an unknown website visitor to a known, regular customer within the health system.

The journey doesn't end there. As mentioned previously in the discussion on being prompt, another differentiation opportunity involves the role marketers can play in streamlining encounters by stripping out process complexity, frustration, and time, both before and after an encounter. Emerging solutions, often involving mobile platforms, directly target this time domain, both pre- and post-encounter.

In the following section on “Portable,” an example of how Tampa General has simplified its hospital navigation through a mobile app is provided to demonstrate how such apps can be employed to enhance portability. When developing the mobile app, known as TGH GO, Tampa General kept the consumer in mind and used simple photography, landmarks, arrows, and turn-by-turn guidance to help patients through the hospital's facilities to their desired destination.

Another example of revolutionizing the patient journey is an inter-visit communications platform from Healthgrades. With this technology, hospitals gain the ability to have a continuous dialogue with their patients about their current health, care options, and wellness programs. This continuous dialogue is intended to influence choices and affect behaviors to achieve healthier outcomes.

The patient pathway is no longer limited to what happens within the brick-and-mortar walls of the health system, but now includes every step of a patient's decision journey, including their digital engagement and the move to mobile interactions.

The Fifth P: Portable

Healthcare providers recognize the growing imperative to move beyond episodic care to participate in a broader cross section of their customers' life activities. This important shift is being driven by a multitude of factors, including: value-based purchasing and the associated need to drive outcomes; at-risk care relationships that incentivize reductions in the cost of care; the growing impact of quality scores and reviews on both brands and bottom lines; and a host of other factors.

In addition to shifts within the healthcare industry enormous shifts are under way within the customer base and its growing demand and expectation for mobile access to services. Possibly the two most powerful data points underscoring this fact are:

1. **82%** of searches are now conducted via mobile device.
2. **70%** of those searches result in some form of action within one hour.

The undeniable conclusion from these data points is that consumers are making decisions — and often spending money — through rapid, mobile-enabled discovery, which is then quickly translated into a choice of provider.

Unfortunately, the majority of health systems have yet to venture into the world of mobile, whether in the form mobilized (responsive) websites, or true mobile apps downloaded from Apple or Google.

Beyond the obvious miss regarding the inability to participate in mobile commerce opportunities, healthcare providers forgo considerable rewards due to their inherent inability to capitalize on the compound benefit of mobile-enabled services such as appointment scheduling and telehealth.

That is to say: First, mobile provides unparalleled opportunities to generate frictionless, memorable experiences. From hospital navigation through journey management, mobile devices are ideal for streamlining the customer experience while producing brand-accretive services.

Second, by converting manual processes to mobile-enabled services, healthcare providers are able to drive cost and time out of their operations, resulting in measurable bottom-line improvement. From mobile-app appointment scheduling to bill pay and prescription renewal, the conversion of labor-intensive tasks to customer-controlled activities allows healthcare providers to either redirect scarce resources or improve challenged bottom-line performance.

Finally, the emergence of device-enabled medical capabilities such as home health monitoring and exercise tracking afford the healthcare provider a unique opportunity to establish trust while participating in lifestyle-aligned, non-episodic interactions — the dream of any brand manager.

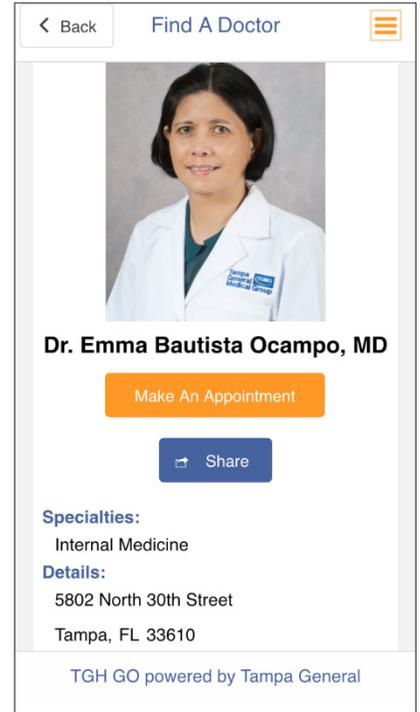
From hospital navigation through journey management, mobile devices are ideal for streamlining the customer experience while producing brand-accretive services.

Tampa General's TGH GO app demonstrates how mobile technology makes services more usefully portable for consumers. A subset of patient-friendly features, highlighted in these screenshots, illustrate the unique power of mobile-enabled healthcare services, such as:

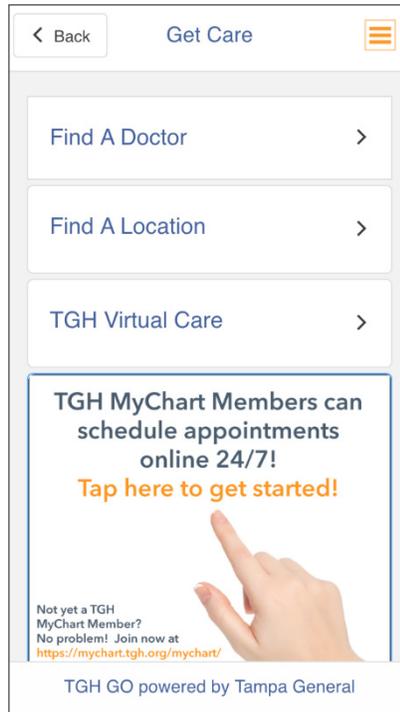
1. Telemedicine



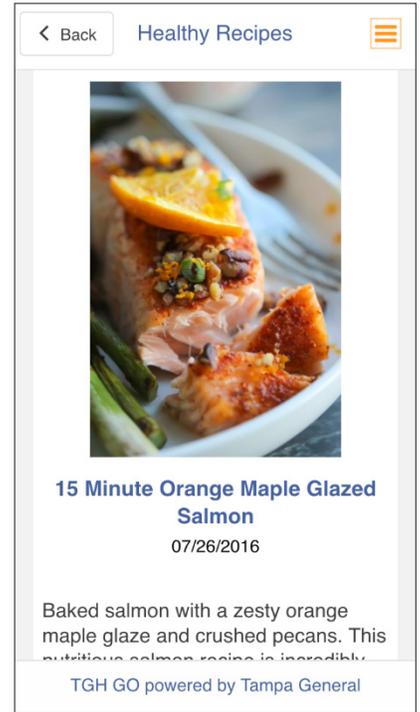
2. Physician finder



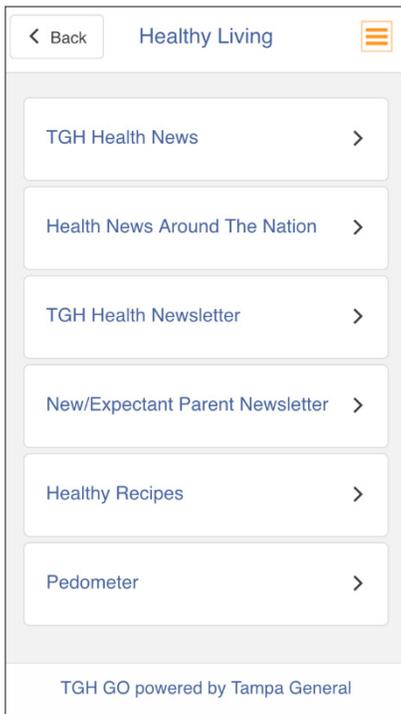
3. Appointment scheduling



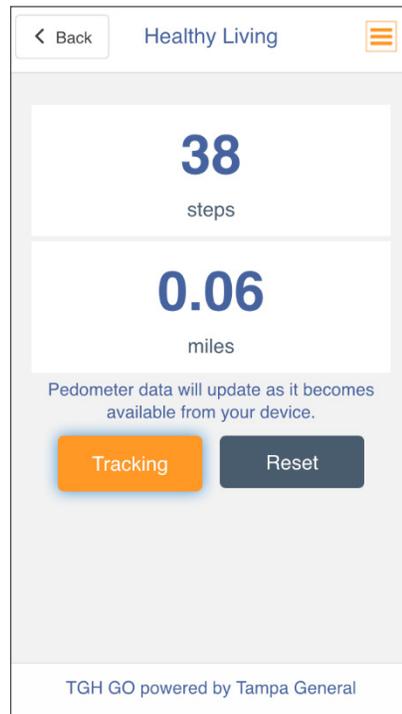
4. Healthy recipes



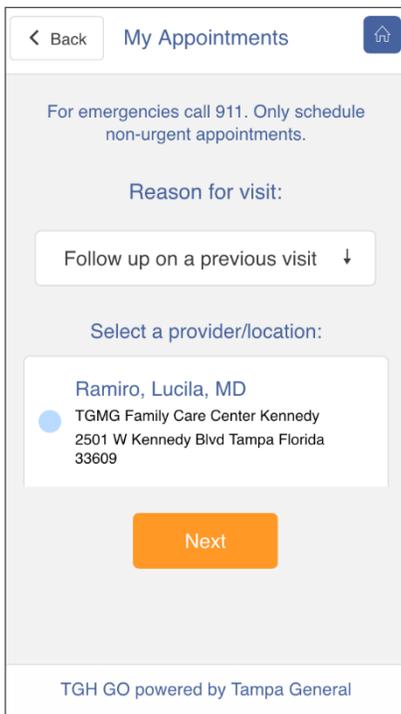
5. Classes and events



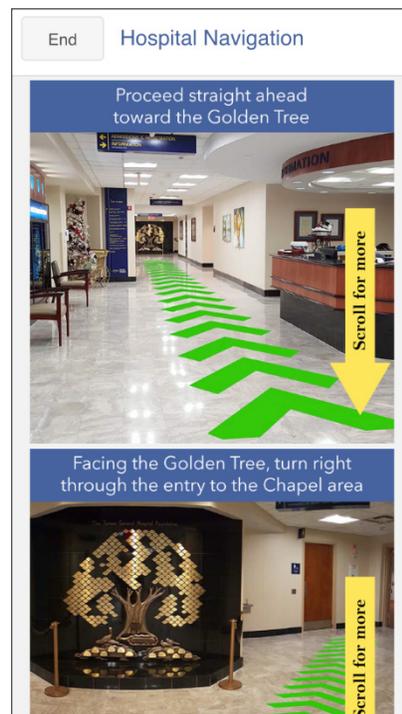
6. Pedometer



7. Referral



8. Hospital navigation



...and many more! These sample screenshots highlight the power of mobile-enabled services. These are, in fact, a mere glimpse into a vision of myriad higher-order capabilities, such as journey management, personalized medicine, loyalty, and peer referral.

The key is to start with the business strategy, and then establish initiatives that advance the goals articulated within the business plan.

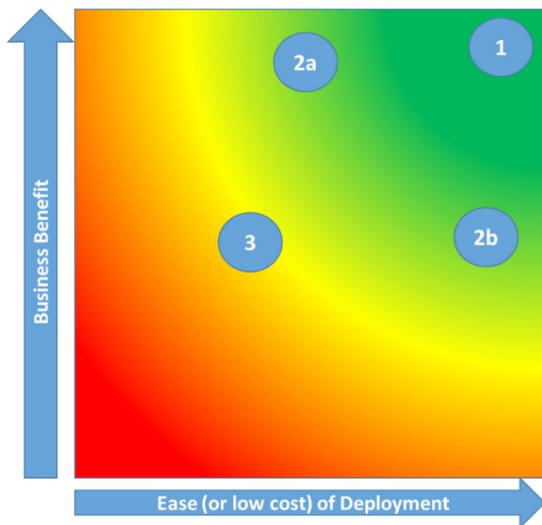
Planning to Win: Building the Capabilities to Make It Happen

Our goal throughout this document has been to provide insight into what we believe to be the future role of and opportunity for marketing in the rapidly emerging, consumer-driven healthcare marketplace. We now wish to offer guidance on how to actually put in place a practical plan to capitalize on the considerable advantages to be gained through embracing digital marketing principles and capabilities.

As with all marketing plans, the key is to start with the business strategy, and then establish initiatives that advance the goals articulated within the business plan. With that foundation in place, defining a set of governing “capability principles” will help prioritize and shape decisions that will unfold throughout the road map journey. Those principles may take the form of something similar to the following *sample* statements:

Real Time	All data and processes must be compressed to enable service cycle times within the decision envelope of the customer. For example, data must be provided in near real time for quick-turn services such as wait-listing.
Where They Live	We will provide information access via all high-use channels spanning mobile, social, email, and text. We will also utilize cross-channel triggers based on customer activities. For example, a customer with a pending appointment may receive a text indicating a more attractive time slot has opened, offering an “accept” button to eliminate the need for a calendar-challenged phone call.
Personalized Interactions	Images, messages, and content will be audience-aligned, with the intent to identify specific personas for each individual (“medical mom,” first-time visitor, returning, member, etc.).
Closed Loop	All campaigns and tests must have data at the individual-record level, and all of that data must be leveraged for real-time interactions and longer-cycle campaigns. In other words, we will never operate a campaign that cannot be measured for effectiveness and that does not update the database for audience participants.
Test and Learn	Wherever possible, we will strive to test the performance of option A versus option B to continually refine the effectiveness of our content, messaging, and placement.

As with any set of priorities, demands will always outstrip available funding. To navigate this reality, here is a fairly simple yet effective tool. As depicted below, there are several elements to this analysis tool:



- Each investment idea or capability is consolidated onto a common list.
- The marketing team scores the value of each idea (y-axis).
- Typically, IT scores the ease (or low cost) of the idea (x-axis).
- The investment ideas (in this case, items 1, 2a, 2b, and 3) are then placed on the grid using the scoring described above, as represented to the left.

- Depending on constraints such as funding or IT resources — or conversely, depending on how strategic the needs are — the organization can decide the relative sequencing for items 2a and 2b.

On the subject of road map pace — and its sometimes daunting scale — quite often healthcare marketers believe they will never be able to catch up to the capabilities of other consumer markets. Ironically, in some ways it is better for healthcare marketers to start without an existing technology suite. This is because one of the challenges faced by traditional consumer markets is the legacy platforms they own, and the associated “ball and chain” constraints that impede their agility to react to emerging needs and solutions. Healthcare marketers do not typically face this issue, and are thus afforded a considerable degree of freedom in building a platform from the beginning.

The relatively “clean slate” characteristic of many health systems’ digital consumer environments implies that a few key issues must be effectively, and sometimes artfully, navigated:

- 1. Selecting a partner or team of partners.** Trust is perhaps the dominant, and most often missed, driver in selecting external partners to aid in the journey of constructing a consumer-ready set of digital platforms. All providers are going to feature technology with impressive bells and whistles. Given that most health systems do not have a depth of experience compared with these providers (and are thus at risk of being taken advantage of), it is critical to have confidence that recommendations will be grounded in health system need and not provider desire.
- 2. Determining a road map.** As illustrated in the prioritization grid near the top of this page, it is important to consider both need and the ease of meeting that need

Given the enormous shift of customers toward mobile, coupled with the emergence of providers and capabilities, it is almost impossible to ignore the need to venture into the world of mobile-enabled solutions.

when deciding where to start and what sequence to follow. Choosing an investment category that is highly strategic but very difficult (and expensive) to implement runs the risk of injecting considerable delay into the road map. And this delay can impede momentum and ultimately cast doubt throughout the organization as to the viability of continued investment in a digital road map. As a consequence, our bias is to start sufficiently small in order to focus on generating momentum and confidence, thus engendering enthusiasm for the next phase of investment. Regarding category sequencing, there are natural places to start. Given the foundational role a master database plays in helping you understand the customer and measuring marketing effectiveness, CRM is a natural area to consider first. Further, mobile technologies offer enormous value to the customer, addressing thorny access issues such as hospital navigation and physician selection, while providing a multitude of “lifestyle” features that foster long-term relationship cultivation. Given the enormous shift of customers toward mobile, coupled with the emergence of providers and capabilities, it is almost impossible to ignore the need to venture into the world of mobile-enabled solutions.

- 3. Engaging IT resources.** It is a well-known fact that most healthcare IT organizations are overburdened, and often are embroiled in complex EMR implementations or expansions. Compounding this is the recognition that marketing can be a rather foreign concept for many IT professionals. This combination of factors implies that effective engagement of IT can be challenging at best. Fortunately, most marketing platforms (CRM, web, mobile, marketing automation, etc.) can be deployed in a manner that minimizes the demand on internal IT resources to make it happen. Naturally, HIPAA and other security concerns must be addressed; it is also prudent to think through an integration road map to set the stage for the future leveraging of EMR or other data within the marketing ecosystem. Our recommendation is to identify an internal IT leader who embraces the need for marketing success; it may also be helpful to secure the services of a consultant or trusted partner to broker conversations with IT, to ease their concerns and articulate specific ways in which they can help deliver success.
- 4. Institutional support.** As difficult as it can be within a healthcare marketing department to establish momentum to understand and embrace the move to digital consumer marketing, it is often considerably more challenging to gain this support throughout the health system, particularly at senior levels where bottom lines and clinical investment demands are ever-pressing. Recognizing that every organization is unique, we will attempt to break this issue and our suggested approach into four categories. Our goal is not to provide an exhaustive description of each, but rather to offer a few practical recommendations on how to garner support in each area.
 - a. Culture.** As discussed in the “Pathways” section of this document, it is critical for marketing to serve as the voice of the customer in streamlining services access and delivery. This can be a daunting task when dealing with overworked clinical areas that may not recognize the power of experience. Alignment with the patient experience team or similar group to collaborate on key areas for improvement is necessary. This will also provide some context as to why there is a need to improve patient interactions, particularly given the growing emphasis on and impact of clinical quality and patient experience scores.

- b. Processes.** There may not be a more difficult dimension of health system operations to impact than that of patient-related processes. The demands of clinical tasks, compounded by the stress and omnipresence of patient/family requests, make share of mind difficult for marketing to secure. As a consequence, patient experience improvement should initially focus on areas that involve less clinical buy-in. There are a multitude of ‘target-rich’ areas to address for appointment scheduling, pre-encounter, and post-encounter, which provide wonderful opportunities to improve patient interactions without obligating clinical areas to change their already burdensome processes. Fortunately, these process areas also directly impact revenue and patient engagement, key goals of every marketing organization. Once momentum is established in these areas, it becomes easier to address more complex functions within the health system, particularly given the ability to highlight measurable successes and benefits.
- c. Funding.** Challenges associated with securing funding for the consumer/digital road map will arise for almost every healthcare marketer. To meet that obstacle, there are a number of approaches that may be successful. First, considerable data is available on results that have been achieved through similar investments in non-healthcare markets. Personalization is just one area in which case studies (formal and otherwise) can illustrate a clear increase in engagement, conversion, and attributable revenue. It is also essential to establish clear, measurable objectives — often in the form of a marketing dashboard — which serve to focus the team on results and to publish those results to interested constituents. Unlike traditional advertising, digital marketing allows for high-fidelity measurement of results, including the ability in many cases to compare against a control group to truly measure incremental lift. Much can be gained from talking to peers within the healthcare industry who are on this same journey. Stories are emerging daily of how healthcare marketing leaders are driving results. Finally, the bingo-card tool referenced in the “Personalized” section provides a method for picking key customer moments of truth on which to focus and for articulating to other business leaders the planned road map for addressing consumer needs in an ROI-focused manner.

Conclusion

While it is clear that the role of the healthcare marketer has forever changed, there has never been a more invigorating time to serve in this capacity. The opportunity to have a profound — and now measurable — impact on top- and bottom-line performance has never been greater. Customers have never been more attuned to their needs and expectations. On top of it all, technologies exist and new ones are emerging that allow us to convert our dreams of patient engagement, behavior influence, and healthier outcomes into reality.

Not everyone in healthcare marketing will embrace this paradigm shift. While this is unfortunate, those who remain on the sidelines are increasingly at risk of losing serious ground to those of us who are in the game. Furthermore, the ability to advance their marketing effectiveness through iteration, measurement, learning, and improvement in the next cycle will position those at the forefront for sustainable advantage.

Is this stuff easy? Not always, but it sure is fun, and it offers enormous opportunity to make a real impact — both for the patient and the health system.

We hope this paper has provided clear insight into the power of the five Ps of healthcare marketing — Patient-centered, Prompt, Personalized, Pathways, and Portable. Just as importantly, we hope we have equipped you with concrete, proven approaches to making it happen.

The modern digital consumer is anxious for us to deliver, and our organizations are counting on us to drive results. ***Let's go get 'em!***

About the Authors

Rich Phillips

Chief Technology Officer
Tampa General Hospital



Rich Phillips is a growth-driven innovation executive who has enjoyed a diverse and rewarding career, having served as a CEO, COO, chief marketing officer, CSO, and CTO. Through his previous experience with several multi-industry loyalty solution providers, Rich possesses considerable command of customer engagement, behavior influence, customer experience, and consumer loyalty solutions delivered through sophisticated marketing principles and technology frameworks. These solutions were developed with market pioneers spanning multiple healthcare leaders and eight of the top 10 largest card issuers (Chase, Amex, Capital One, Wells Fargo, US Bank, HSBC, etc.), as well as auto and CPG. Today, as chief technology officer of Tampa General, Rich is, with his team, advancing a multitude of “consumerized” healthcare solutions spanning next-generation mobile, personalized web, referral management, cross-provider care coordination, data-driven population health, health monitoring, and telemedicine.

Rich has a Master of Information Management, a Master of Business Administration, and a bachelor of science in electrical engineering. He has also served as adjunct professor at Olin Business School at Washington University in St. Louis.

Heidi Schulte, MBA

Vice President, Solutions Consultant
Healthgrades



Heidi Schulte is an accomplished marketing strategist who has focused primarily on direct-response marketing for hospitals and health systems across the country. As vice president, solutions consultant at Healthgrades, Heidi serves as a senior strategic marketing advisor to hospital executives, assisting with business intelligence activation through initiative identification and strategy development in the areas of growth, physician alignment, and patient engagement.

Prior to joining the solution consulting team, she served Healthgrades as vice president, strategic marketing, leading a team of talented marketing strategists who develop, implement, and measure solutions for their healthcare clients. The strategic team provides integrated solutions for business opportunities such as physician engagement, patient acquisition, and patient retention through data mining and analytics that, combined with award-winning creative execution, produce positive return on investment for their clients.

Heidi has been with the organization since 2006 and has held several leadership positions during her tenure. Prior to joining Healthgrades, she served as a marketing director for a certified public accounting firm and spent several years with an adoption agency as their operations and outreach coordinator. Heidi earned her MBA from Cardinal Stritch University and her B.S. in consumer affairs in business doubled with psychology from the University of Wisconsin–Madison.

About Healthgrades

We are not simply experts in patient and physician engagement. We actually created customer relationship management for healthcare nearly 25 years ago and continue to move the needle with our tools for patient engagement and physician relationship management. We can help your health system target, connect with, and motivate the patients you want, and show you how to strengthen your physician relationships to keep referrals within your network. Our solutions combine evidence-based, multichannel communications with a business intelligence platform to build relationships, influence behaviors, and improve healthcare utilization — all with a measurable contribution margin for your hospital.

To learn more about how the Healthgrades platform can empower your health system, your physicians, and your patients — so that you can deliver a new and better model of care while improving your top-line growth — call 855.665.9276 or visit healthgrades.com/hospitals.

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