4 key CRM best practices

Maximize your organization's success with CRM

Contents

The information and techniques in this guide can help your organization understand key practices and elements of healthcare CRM — predictive modeling, personas and patient pathways, personalization, and attribution.

Introduction

It is no longer enough for healthcare marketers to focus on the needs of their current patient base; now they must provide access and services to engage new consumers where they are searching for healthcare online. With concern for population health in mind, **the best healthcare marketers use data to predict consumers' health needs** and send targeted campaigns to deliver timely, relevant information.

Consumers are increasingly driving changes in the healthcare industry. They have more information on providers and treatments than ever before — and more options to choose from. In a highly competitive landscape, healthcare organizations must offer greater convenience and a better, more personalized care experience to win market share.

Healthcare marketing teams play an essential role in streamlining and improving the patients experience. Marketers are now tasked with using consumer data to hyper-target prospective patients with messages that will cut through the noise and resonate.

To achieve all of this, healthcare marketers need a powerful tool in their arsenal: a sophisticated customer relationship management (CRM) platform. Far more than just a way to record consumer contact information, a modern CRM solution acts as a database and interface that helps the marketer aggregate and draw on detailed demographic, psychographic, and behavioral data. Using CRM, marketers can glean valuable insights, develop viable strategies, and deploy effective campaigns to attract more patients.

Some healthcare marketers are doing this already, but many (perhaps most) have a long way to go. Nearly seven in 10 (69%) healthcare organizations have a CRM system, but only 17% report that their CRM and website(s) are well-integrated. Among those currently without a CRM, 38% plan to implement one within the next 12 months.[1]

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The power of a sophisticated CRM practice lies in its ability to help you gather, organize, and analyze data from a variety of sources, and then act on it by creating messages and campaigns to engage and convert key audiences. CRM's true effectiveness is most evident when it's used to generate a highly granular view of consumers and their behaviors — offering insight into what your patients and prospective patients want and respond to. Collecting, assessing, and deploying that data requires you to understand practices and elements such as:
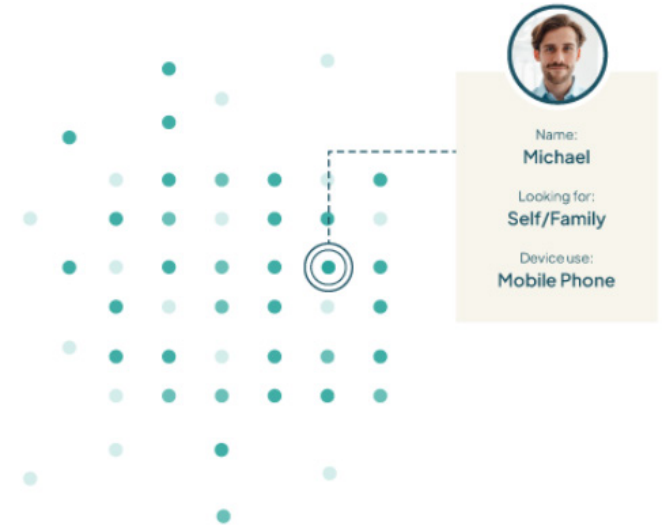
1 **Predictive modeling**

2 **Personas and patient pathways**

3 **Personalization**

4 **Attribution**

Let's explore these best practices now

Name:
Michael

Looking for:
Self/Family

Device use:
Mobile Phone

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Predictive modeling

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Predictive modeling involves assessing aggregated data to determine the likelihood of certain potential outcomes coming to pass. In healthcare, it is generally used to understand what types of attention or services a consumer or patient is likely to need in the future, based on the individual's age, family history, chronic conditions and medical utilization, as well as behaviors and lifestyle factors. Predictive strategies can also be used to anticipate costs and more effectively manage the health of specific populations. But they don't enable healthcare organizations to understand a population's health situation or identify individuals who may soon need certain services.

Among other things, hospital marketers can use predictive modeling to:

→ **Identify at-risk populations.** Distinguishing common risk factors gives marketers a better idea of whom they need to reach in a certain population. Moreover, predictive modeling can identify trends in data that signify changes in risk status (e.g., patients whose risk levels are rising).

→ **Segment the market with greater accuracy.** Predictive modeling can assess risk based on how closely a patient's current state of health resembles the model, which allows healthcare marketers to personalize their communication strategies.

→ **Establish message urgency.** Certain patient needs generate greater urgency, which allows marketers to send correlating information when patients seem most responsive and approachable.

→ **Select the most effective channels to reach the right individuals.** With predictive modeling, you can keep track of individuals' propensity for engaging through certain marketing channels, improving your message's odds of success by leveraging the recipient's preferences.

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Predictive modeling applications:

Identify and understand patterns that drive cost

Example: Reduce admissions for uncontrolled diabetes.

Send preemptive communications

Example: Invite someone at risk of heart disease to a heart-health screening.

Create value by pinpointing targets

Example: Promote joint replacements or bariatric surgery to those most in need.

Reduce readmissions and complications

Example: Send communications after discharge to improve compliance with post-op or discharge instructions, and identify symptoms of infection or relapse as early as possible.

Predictive modeling can provide the necessary information to:

Bring in new patients

Manage current populations

Increase the loyalty of affiliated parties

By integrating predictive modeling into a CRM strategy, a healthcare marketing team can better identify opportunities that align with their organization's goals. Predictive modeling can provide the necessary information to bring in new patients, manage current populations, and increase the loyalty of affiliated parties. By meeting consumers where they are, a marketer can demonstrate that their organization is focused on the patients' care needs and on making the care experience more convenient and positive overall, which helps to ensure those patients will keep choosing the healthcare organization's brand.

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Personas and patient pathways

Healthcare marketers communicate with thousands of consumers, addressing their concerns and hoping to guide them on the proper care journey. For their communications to resonate — and to increase the odds of conversions — marketers must personalize their messages. Since meeting face-to-face with each person is far from feasible, healthcare organizations need to find realistic ways to understand large groups of consumers at an individual level.

A **persona** is a generalized group of individuals who share goals, needs, and behavior patterns, according to collected consumer and patient data. Gender, age, income, and lifestyle factors are among the basic demographic details that are typically analyzed to better understand consumers collected under a persona. By creating personas, a healthcare marketing team can better understand personalization on a large scale, which helps them identify where consumers are on the patient pathway and how best to nurture them.

The **patient pathway** is the clinical progression of a patient from the time she experiences a problem to the time she chooses a medical solution and its positive result. Clinical and behavioral cues help identify where a patient is today and what the next likely action is.

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By creating personas for patients, a healthcare marketer can segment consumers efficiently based on collected demographic data. Personas give marketing teams a better opportunity to understand the people they're speaking to, which allows them to target the correct individuals and personalize their care information properly. **This reduces wasted cost, time, and effort.**

Personas also allow a marketer to better anticipate the type of treatment a patient will need, thus establishing expectations for the patient pathway. The marketer can then keep the patient informed with personalized messages about what they can expect from their initial encounters, the treatment itself, and aftercare.

Personas give marketing teams a better opportunity to understand the people they're speaking to.

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Building patient pathways gives marketers options and helps them determine the messages that will best resonate with a consumer.

Successful healthcare marketers have a clear understanding of the ways a consumer enters their organization and how patients navigate based on their care needs. When a marketer not only customizes their message to a persona, but also maps it to the patient's current or upcoming episode of care, they show that the organization truly cares about the patient's needs.

A sophisticated CRM platform has powerful data-aggregation capabilities, which grant marketing teams more opportunities to accurately identify which consumers are most likely to need a particular procedure. For example, a consumer who will eventually undergo a knee replacement may experience a precursor symptom such as joint pain or swelling. This systematic discomfort and pain marks the first step on the consumer's journey, even though a diagnosis will not be made until later.
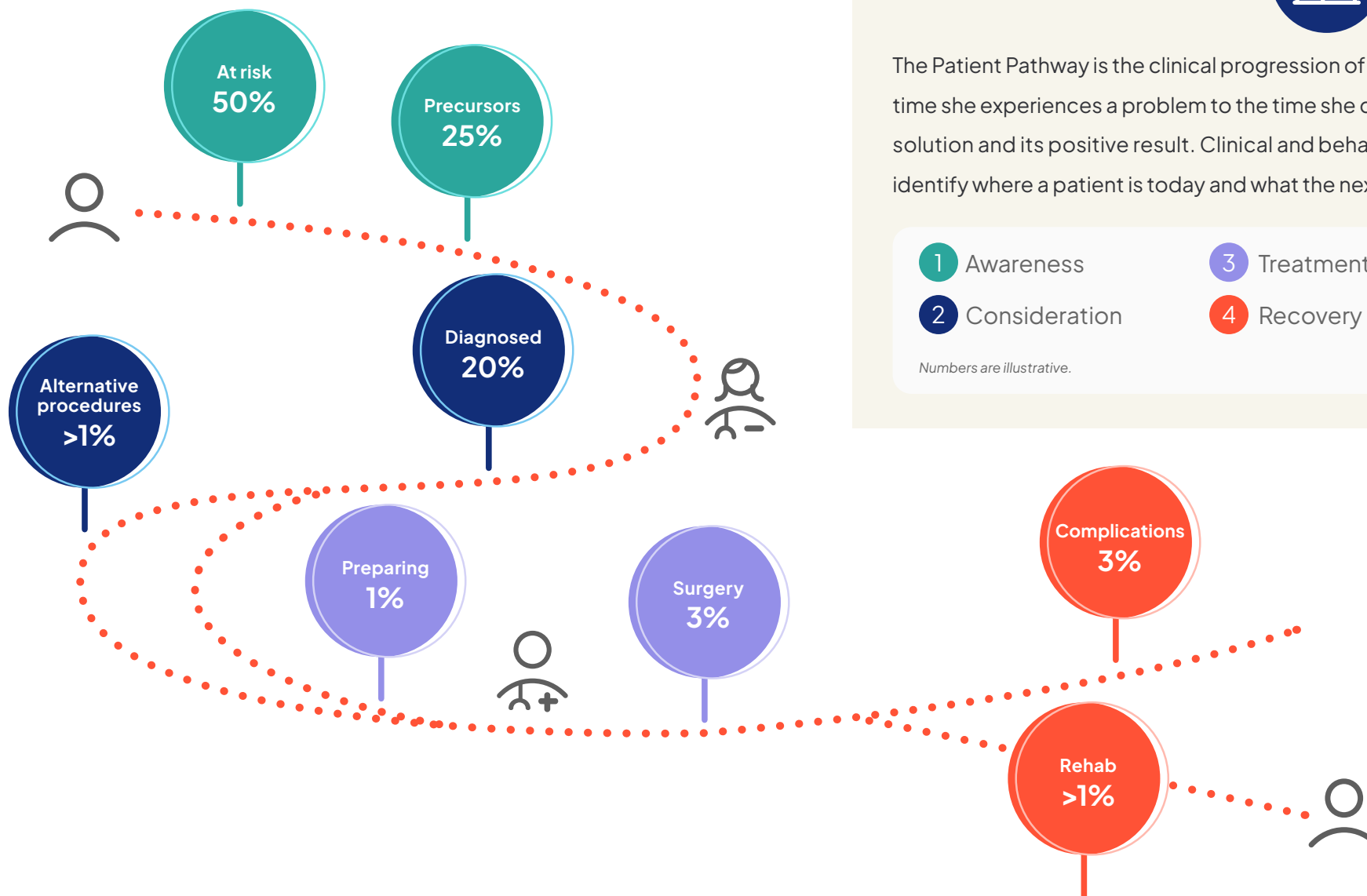
The knee-replacement candidate would likely next be diagnosed with arthritis, and then perhaps try alternative therapy to relieve the condition. Subsequently, the patient may be tested to determine whether surgery is the appropriate next step. The final phase of the patient pathway would involve surgery and rehab.

A quality CRM solution allows marketers to **use data to create personas and helps them identify and map out similar patient pathways in the future.** Then, by assessing patient personas and understanding where a healthcare consumer falls along a patient pathway, the marketer can gear their efforts specifically toward that individual, to deliver more relevant and engaging messages — and consequently, more effective care.

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Total knee replacement

PATIENT PATH DISTRIBUTION

At risk
50%

Precursors
25%

Diagnosed
20%

Alternative procedures
>1%

Preparing
1%

Surgery
3%

Complications
3%

Rehab
>1%

The Patient Pathway is the clinical progression of a patient from the time she experiences a problem to the time she chooses a medical solution and its positive result. Clinical and behavioral cues help identify where a patient is today and what the next likely action is.

1 Awareness

3 Treatment

2 Consideration

4 Recovery

Numbers are illustrative.

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Personalization

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In healthcare marketing, **personalization** refers to identifying an individual consumer's relevant attributes and then presenting that consumer with only the content most applicable to their health needs. Patients now expect healthcare providers to know something about them based on information they have previously shared.

Patients also now expect healthcare organizations to personalize or tailor their outreach to match the individual recipient's needs. Boilerplate messaging is easy to ignore, increasing the risk that a patient might overlook essential treatment information.

Organizations that meet these expectations and anticipate care needs will target consumers more effectively, by providing them with directly relevant information that drives them to seek care. And while personalization ultimately benefits patients, tailored messaging is also good for marketers, as it leads to higher rates of conversion. In fact, a survey of marketers found that **63% reported increased conversion rates as the top benefit from using personalization.**[2]

Personalization has other benefits as well:

- *Helps develop consumer trust by enabling more contextual content*
- *Increases engagement with consumers across your system*
- *Promotes positive behavior change and outcomes*
- *Increases loyalty and nurtures long-term patient relationships*
- *Becomes a cost-effective initiative when combined with efficient tools*

360°
PROFILES

With personalization, providers deliver more value-based care because they are able to identify patients who are most at risk or in need of immediate treatment. For instance, imagine a patient who is searching for information based on a certain ailment or injury. By collecting data about the user's digital search patterns, a healthcare marketer can provide them with contextual information tailored to fit their needs.

The right CRM platform will make it easy for a marketer to send personalized communications and quickly gauge their effectiveness. Marketers can also use a sophisticated CRM solution to build **360° profiles to activate data insights across channels.** These profiles then help the marketer identify opportunities, build targeted strategies, assess at-risk populations, and create campaigns for those audiences. For example, paired with the appropriate predictive models, a 360° profile could help a marketer determine the most effective time of day to send information to a certain patient, the best channel to use, and the most resonant messages for that patient. Features like this this make personalization worth the investment.
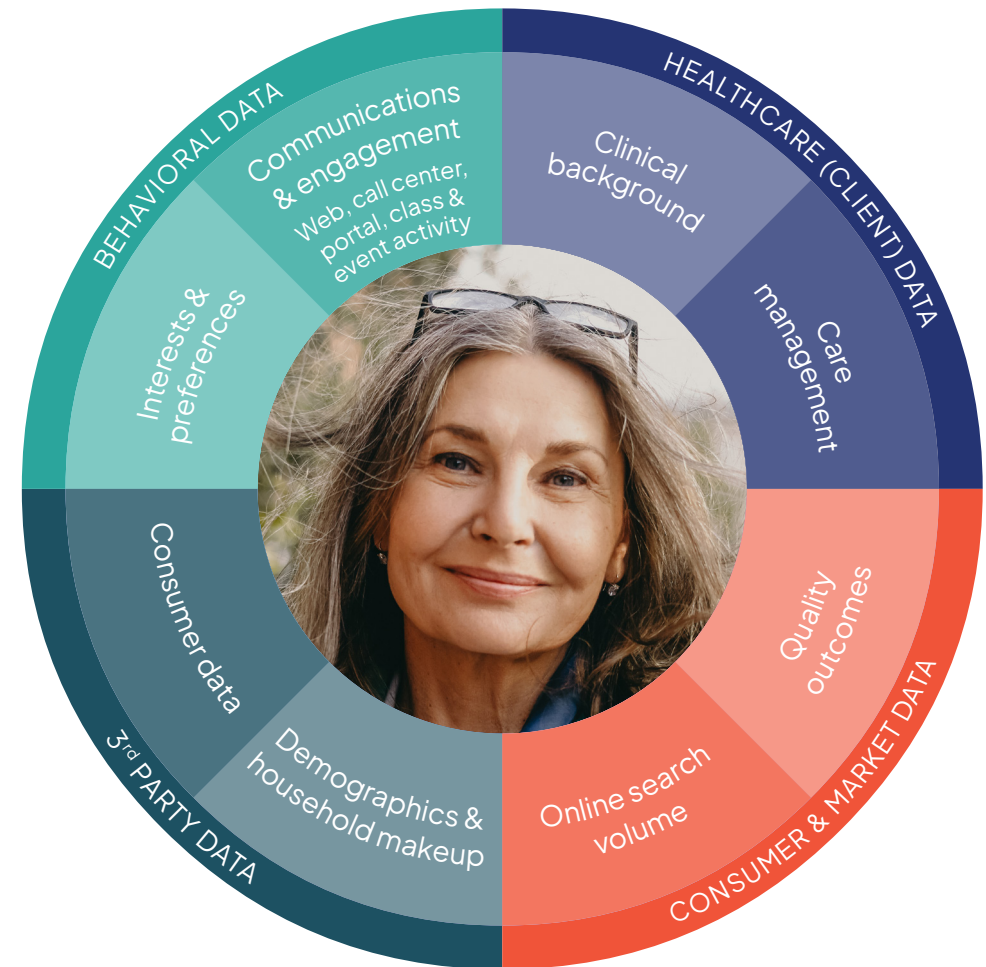
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Attribution

Attribution is the process where marketers identify which actions bring about desired outcomes and determine the values of each action. Attribution helps marketers measure impact and identify the campaigns that yield the most value.

For healthcare marketers, the first step in attribution is to identify touchpoints along the care journey where patients can be influenced to make specific choices. Successfully influencing the patient at one of these touchpoints is known as a conversion.

By using attribution to divide credit for a conversion among certain touchpoints, marketers can determine how much ROI any touchpoint is generating. Used correctly, **attribution provides data that helps marketers use their budget more effectively,** by accurately pinpointing specific tactics that convert new audiences.

Accordingly, attribution helps healthcare marketers answer two difficult questions:

1 *How do we accurately attach the value of the consumer to the marketing media chosen, based on ROI?*

2 *How do we properly allocate value to the consumer's various interactions with our organization?*

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Few healthcare marketers make truly effective use of attribution. Too often, they think in terms of just one tactic and focus on just one touchpoint at a time, instead of considering the entire series of events along the decision-making journey. In an incredibly crowded and competitive marketplace, focusing on one tactic at a time jeopardizes a marketer's ability to capture new patients.

With the right CRM solution, a marketer can attribute value to touchpoints along the care journey and measure channel, campaign, and service line performance. Attribution can even show the ROI an individual patient is generating.
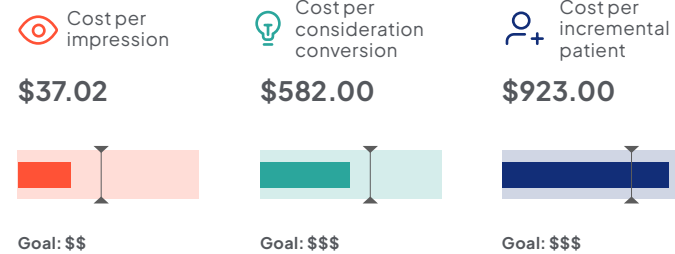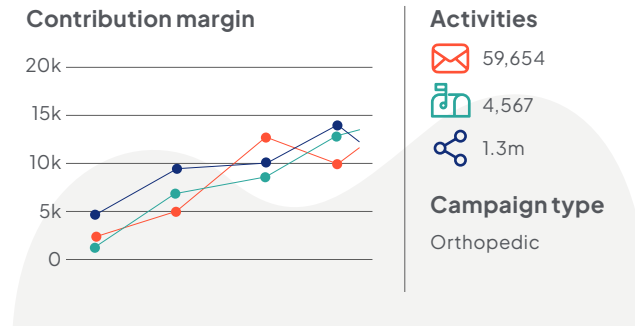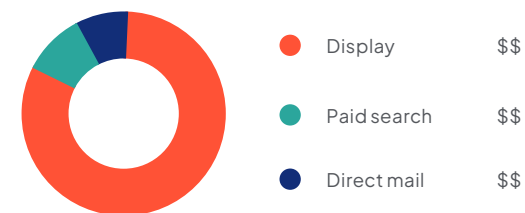
For instance, when a consumer has scheduled a doctor's appointment, a healthcare marketer wants to see what series of steps led the consumer to take that action. With attribution, the marketer can pinpoint the touchpoints and messages that made the biggest difference in capturing the appointment. Focusing on those critical steps allows the marketer to maximize results using fewer resources. When marketers succeed at influencing an audience, that success informs their subsequent decisions.

By analyzing a wide swath of data, healthcare marketers can better target consumers at pivotal moments in the decision-making journey.

Contribution margin

20k
15k
10k
5k
0

Activities

✉ 59,654
📠 4,567
🔗 1.3m

Campaign type

Orthopedic

The right CRM platform makes it easier to perform data-based inquiries on multi-touchpoint tactics, rather than leaving a marketer to focus on single touchpoints. Marketers can then test multiple tactics simultaneously to **quickly determine the most successful approaches.** Moreover, they can then identify not only which campaigns yielded better results, but also a given campaign's success among specific consumers.

👁 Cost per impression

$37.02

Goal: $$

💡 Cost per consideration conversion

$582.00

Goal: $$$

👤₊ Cost per incremental patient

$923.00

Goal: $$$

Total contribution margin

● Display $$

● Paid search $$

● Direct mail $$

📈 Incremental ROI

5.31:1

👤₊ New patient ROI

10.97:1

Conclusion

Depending on your goals and resources, you can focus on these best practices holistically or one at a time. Each one of these best practices can attract more traffic to your online assets and care centers by driving personalized CRM campaigns that reach the right people with a message that's meaningful to them. Continue to test and adapt your strategy over time for maximum CRM success.

1   Greystone.Net and Klein & Partners. Wave 7: State of the Digital Marketing in Healthcare Report.

2   Statista. Leading benefits from personalization according to marketing professionals in the United States.

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