



The patient acquisition and engagement playbook

6 volume and revenue-driving tips for healthcare marketers



Acquiring and engaging patients most likely to need your services with the ability to pay drives marketing ROI

When it comes to care, rising out-of-pocket healthcare costs and higher patient responsibility are becoming increasingly common, extending the financial burden to healthcare as well. With a strong marketing patient acquisition and retention strategy focusing on profitability and improving lives, you can avoid campaign return and lower patient volumes.

The most successful health and hospital systems take a consumer-first approach. These systems succeeded at adapting quickly, incorporating consumer-level data for precise marketing activities, like that of Amazon or Nordstrom.

Leveraging consumer-level predictive models is essential to delivering your marketing message at the right time, to the right person, and through the right channels. This strategic approach provides:

Improved health outcomes:

A strong patient acquisition marketing strategy that leverages data like those likely to act increases primary and specialty service line growth and treatment plan adherence, leading to fewer complications and re-hospitalizations.

Enhanced staff efficiency:

Patient acquisition strategies can help reduce front-end staff workload by engaging individuals to schedule primary care visits over ER visits and improve staff efficiency with full patient schedules for new clinics, physicians, or specialty lines.

Increased patient satisfaction:

Personalized and unique patient acquisition and engagement marketing enables patients to feel heard and seen and empowers them to make decisions about their care. Personalization enhances overall satisfaction, builds brand reputation, and facilitates longer-standing relationships with providers while improving experience measures.

Reduced cost:

Acquiring and engaging the right patient directly contributes to the outcomes affecting hospital costs and reimbursement for health systems. By ensuring you are engaging those most likely to need your service and with good insurance and the ability to pay, executing effective patient acquisition strategies also means revenue to the bottom line.

Increased revenues:

Data-driven marketing directly contributes to the outcomes for hospitals and health systems and means better patient retention. Overall, consumer-level data propensity models and multi-channel, multi-cycle outreach strategies are essential for healthcare marketers looking to acquire new, profitable patients and properly address patient needs, which have shifted dramatically due to healthcare consumerization and the pandemic. Now, more than ever, healthcare marketers must consider the following strategies to facilitate greater returns on marketing efforts.

- 1 Deliver relevant outreach through prediction patient segmentation**
- 2 Engage individuals through personalized marketing outreach**
- 3 Digital is excellent – but don't neglect print**
- 4 Keep an eye on the competition**
- 5 Balance acquisition with retention**
- 6 Measure, analyze, and optimize**

1

Deliver relevant outreach through predictive patient segmentation.

Marketing can be expensive and ineffective if you send a generalized message to everyone living in the zip codes near your locations. On top of that, limited tracking and vague results prevent you from knowing which campaigns are effective, adding risk to your marketing efforts.

Leveraging consumer-level propensity models is most effective in reaching the exact individuals who need your services and can pay. It's insufficient to leverage EMR data or only a few typical demographics, such as gender, age, and health concerns.

What is a consumer-level propensity model? Virgin Pulse's prospecting with confidence database uses attributes such as likelihood to act, call center data, healthcare consumer data, EMR data, and many more data sources across 275M adults in the U.S. to identify who will be most receptive to your outreach so that you can target your marketing efforts.

As a result, predictive templates created in one single CRM allow you to identify, target, and see real-time ROI on your marketing efforts. These targeted lists help you be specific and clear, increase patient conversion, and deliver results.

Pro Tip

Are you adding a service line or new zip code to your system? Leveraging Virgin Pulse's propensity models can help you know precisely who to reach and what your marketable universe looks like during the planning phase. Leveraging this information with key stakeholders, including your CFO, can help de-risk plans and set you up for success without adding any additional work or effort.

Bonus? Quickly deploy as soon as you have the green light to market using multi-channel, multi-cycle efforts in the same CRM as the data set.



2

Engage individuals through personalized marketing outreach

Marketers know that personalization is important, especially in hyper-competitive healthcare communities. But scaling personalization can feel overwhelming and costly if you don't know where to begin. Here are three steps healthcare marketers are taking today to establish and scale personalization without investing millions in IT:

1. Use consumer-level data to build segments

Organizing data by grouping customers, like females aged 40+ in a zip code, is a start, but more is needed to drive ROI. Using consumer-level data, you can drill down to females, age 40+, in each zip code, with children, live in a single-family home, voted Democrat in the last election, speak Spanish, and have not had a breast cancer screening but have a high likelihood to take this action, and have the ability to pay for this service. Now, not only do you have a segment to focus on, but because of the attributes you've selected and enrichment data you don't have, such as email address or mailing address, you can confidently

come up with a campaign that reflects the individuals through imagery, language, and reason to act. That is much more impactful than using a first name as your only personalization tactic.

How does this not include millions of hours from IT? Simple, the data (and real-time ROI data) lives within your Virgin Pulse CRM pre-loaded with our 275M U.S. adult's database – one place for your consumer-level data to slice as you desire without the lift of data scientists. It is super easy to use, showing you everyone (no personalization). Then, each filter provides a query summary of audience size by inclusion criteria and ways to reach them.



2. Focus on processes and tech that help you work faster

Agile methods are essential here – they enable marketing teams to see what works quickly and what doesn't. The right multi-channel, multi-cycle technology is needed to work at this pace. Too often, different marketing channels are owned by separate silos in an organization. For example, suppose you rely on software chosen by IT to send emails, a local print shop to do postcards, and a social media expert on your team to run social ads. In that case, you aren't running as efficiently or agile as possible and are missing data and personalization opportunities.

By removing the need to manage all these different platforms, channels, and capabilities separately, you are not only consolidating your tech stack but also removing the risk if someone leaves the organization, you need to add another channel or expand your business. And the person that most loves to hear about reducing risk? Your compliance teams, data and security, IT, and CFO.

3. Decision-making engine (campaign coordination)

Multi-channel, multi-cycle CRM engines help prevent conflicting messages and drive maximum value per touchpoint per individual. Bonus? With real-time analytics and attribution, you don't have to spend hours figuring out what prompted the result – saving time and money - and accelerating your personalized marketing efforts without the pain.



Ready to see what this looks like in practice?
Predictive modeling helped a primary care clinic
earn \$7.3M in total charges

[Download the Case Study](#) 

3

Digital is excellent – but don't neglect print

Digital channels are the primary way for most consumers to get news, information, and marketing messages. Still, it doesn't mean that is the channel they are most receptive to acting on. Because direct mail is less common and more personal, people are more likely to remember direct mail pieces they've received over a more extended period.

In every marketing campaign, gaining prospects' trust is a top priority, and you must ensure your marketing materials can help. According to the Data & Marketing Association (DMA), 76% of consumers trust direct mail over digital channels when purchasing. Many marketers fail to take full advantage of this marketing method because of the developments in personalizing digital marketing further. However, top-performing healthcare marketing professionals use deep personalization in their direct mail campaigns, resulting in increased patient acquisition and retention efforts. Relevant physical outreach can help you cut through the noise with powerfully persuasive messaging, even for digital-first audiences.

How about an example? A hospital in the southern U.S. sought to increase the volume of profitable patients seeking hip and knee replacement

procedures. The hospital partnered with Virgin Pulse to execute a personalized direct mail campaign targeting 9,000 prospects. The result? \$5M in total charges and a 766:1 ROI. Are you achieving this through digital-only personalization today?



9,000 prospects
\$5M in total charges
766:1 ROI

Hospital Launches Targeted Direct Mail Campaign Resulting in \$5M ROI

[Download the Case Study](#)



4

Keep an eye on the competition

Great healthcare organizations are always concerned with what the competition is doing. Knowing what your competitors are up to can help you take proactive action, such as readily identifying underserved areas. For example, suppose that no one in your area offers services in multiple languages, and you can. In that case, you've just identified an opportunity to differentiate your system and marketing efforts.

Are you looking to expand your reach into a new area? A health system that opened three new medical parks wanted to introduce the recent locations to the community and educate them about the services in hopes of bringing in new and existing patients.



5

Balance acquisition with retention

Bringing new patients in the front door does no good if they leave through the back door just as quickly. If you determine that your acquisition strategy is working, but your patient load is not stable where you want it to be, ensure it isn't directing patients toward overloaded service lines. Always be prepared to shift resources to maximize ROI.

Another consideration is using a marketing campaign calendar to create your strategy for the year that incorporates acquisition and retention activities, then going deeper into need pockets by quarter. For example, in a recent webinar with marketing experts from Houston Methodist and St. Bernards, Mary Kay Boitano-Nelson and Lydia Parkey shared innovative ways they are balancing the two and some unexpected use cases with new contact acquisition driven from event sponsorships. [Check out the full replay for a deep dive from these experts.](#)



Lydia Parkey

Executive Director, St. Bernards Medical Group



Mary Kay Boitano-Nelson

Senior Product Manager, Digital Marketing, Houston Methodist



Jaci Haack

Vice President, Strategic Development for Health Systems, Virgin Pulse

Finding Patient Unicorns: How predictive propensity models power marketing ROI for Houston Methodist and St. Bernards

Watch Webinar



Measure, analyze, and optimize

Justifying the use of resources required to launch and maintain a patient acquisition campaign will need some persuasion. For that reason, you must be able to measure the outcomes of your marketing campaigns and track how performance is improving.

Shifting towards a data-driven marketing endeavor isn't an individual sport; it requires strategic collaboration across key stakeholders, including your CFO.

In a recent SHSMD webinar, Jaci Haack, vice president of strategic development for health and hospital systems and Erica Morgenstern, chief marketing officer at Virgin Pulse, discussed the link between strategic planning and real-time results to drive ROI. [Watch the video here.](#)

During the webinar, Jaci stated, "My short and simple answer is to get your CFO on board...". She further elaborates how storytelling capabilities can "connect the organizational objective dots" with a more objective approach, which is pivotal in data-driven marketing.

As healthcare marketers continue to explore the terrain of data and analytics, it becomes increasingly clear that to unlock unprecedented ROI success, detailed

consumer data, strategic predictive models, multi-channel communication, and collaborative, flexible strategies are the milestones to aim for.

Indeed, healthcare marketers can substantially expand their reach and efficiency through data-driven marketing, successfully identifying high-value prospects that are more likely to engage and invest. As stated by Erica, "...you can help drive strategy with that data.". After all, successful patient acquisition and growth await at the intersection of data and strategy.

That's why we offer a **free report** of high-risk and receptive consumers we've identified in your service area of each service line or procedure – along with insights on risk factors and the outreach channels most likely to drive them in for care. Use this **free market assessment** to quickly get your CFO on board by using actual data to help tell your story of growth. [Claim your free report.](#)



Free Service Line Growth Assessment

Get strategic insights to generate new service line revenue & volumes

[Claim your free report](#)



The next step forward

Healthcare consumerization has given rise to a new generation of patients who act like consumers, asserting their needs and choosing the providers that can meet them where they are. Ultimately, people want to feel heard and seen. They want their providers and healthcare system to speak to them like they know who they are and feel empowered to take their next steps in receiving care.

Thanks to data and technology, healthcare marketers can now deliver what consumers see outside of a healthcare setting. Marketers must be willing to respond with modern patient acquisition and retention strategies to empower patients to be smarter, healthier, and better informed.

The best way to enhance your acquisition and retention strategy is by successfully building a solid marketing infrastructure focused on the whole person. As patients become more empowered in their care, they are more likely to continue their journey with your health system.



How Virgin Pulse supports patient acquisition and retention for marketers

Acquire new and retain existing patients with highly-personalized marketing campaigns that drive more service line use and growth. With real-time data and dashboards, you'll have full visibility into how your campaigns are performing and a full team of experts on your side to optimize as goals or situations change.

Supercharge your marketing campaigns with data you don't have

Multi-channel, multi-cycle CRM engines help prevent conflicting messages and drive maximum value per touchpoint per individual. Bonus? With real-time analytics and attribution, you don't have to spend hours figuring out what prompted the result – saving time and money - and accelerating your personalized marketing efforts without the pain.

Conduct targeted outreach to engage and acquire high-value patients

We can identify and reach patients most likely to seek your high-value service lines like cardiology, oncology, orthopedics & women's health. By systematically communicating with patients via multi-channel, multi-cycle campaigns, you stay

top of mind when they need your services. Our data optimizes your campaign spending by prioritizing and reaching the most valuable prospects.

Capitalize on a health CRM that truly knows your patients

Unlike traditional CRM's we know your patients better than they know themselves. Real-time data and insights improve your ability to acquire, activate, and retain patients. We empower your health system to proactively communicate with patients to achieve near and long-term revenue goals – and seamlessly run personal, seasonal, or annual campaigns.

“

They [Personify Health] have a lot of experience, their models are strong. Layering on claims and clinical data and then processing the patterns and trends in how best to target customers is the main value proposition.”

Director of Digital Marketing, Health System, Customer



Because health is personal™

Let's talk

~personify™
HEALTH