



2017
Digital Marketing Trends
in Healthcare

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Introduction

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Executive Summary

There is no question healthcare organizations are investing in digital marketing at a rapid pace. But it isn't always easy to know where to invest. We often have to look outside the healthcare industry to inform these important decisions.

That's why Geonetric began surveying the industry back in 2005. This year we partnered with leading publication *eHealthcare Strategy & Trends* to enhance this go-to resource for healthcare marketers. We heard from more than 170 healthcare marketing leaders representing 164 different organizations.

The results offer more than just an industry benchmark. We've uncovered insights into what makes some organizations' digital marketing efforts more successful than others.

At the end of the day, what you really want to know is if your organization is ahead or behind—and what to do to stay ahead or catch up.

We have those answers for you, and so much more.

Are you a leader or a laggard?

We've segmented the respondents into leaders, average and laggards. (Check out the [*Using the Data*](#) section to determine where your organization falls.) Here are some key insights to help you understand where you're at now and how to evolve.

Leaders are efficient and execute like pros but are challenged to prove ROI.

What keeps leaders ahead is their ability to execute. Leading organizations' larger size gives them greater efficiencies. But while larger organizations have more staff and larger budgets overall, it's not a linear relationship. Relative to their size, they actually tend to spend less and have fewer staff.

Leaders are able to have dedicated staff in many areas. They either budget for expertise through partnerships or employ specialists directly for design, content, digital marketing, search engine optimization (SEO), or other complex disciplines. Having access to deep expertise in these areas makes a big difference. We often see that having two specialized resources is more than twice as effective as having one generalist.

But leaders aren't without obstacles. Like all segments, budget is a top impediment. Beyond budget, leaders report the inability to measure ROI and inadequate reporting as their top barriers. Leaders will need to look beyond just reporting on digital and start tying digital and operational metrics together. Breaking down silos, building relationships with other departments, and freely exchanging data can help them get there.

Average organizations aren't content to stay average, but time and staff constraints are holding them back.

In past surveys, a few patterns have always held true. Leaders generally spent more overall. They were more sophisticated in their planning and strategy. They were better at tracking their successes. This year, that all changed.

Average organizations aren't satisfied with where they are. They're spending more relative to size, are more sophisticated at integrating digital into their overall strategy, are more sophisticated in their social media strategy, and are adding website capabilities more aggressively than other groups.

With all of that going on, the average group feels their small-staff capacity more acutely than the others. In fact, average organizations reported limited time as a barrier more than twice as often as their leader and laggard counterparts. To overcome this, average organizations will need to start saying "no" to traditional marketing tactics that aren't providing value, or outsource more specialized tasks to agencies and partners.

Laggards feel comfortable with social media but need additional expertise to compete in other areas.

Social media is the only area where a significant group of laggards feel positive about the work they are doing. They report struggling with more specialized tactics such as website design and SEO, and that makes sense since they also cite inadequate skills and training as their biggest obstacles. Laggards also tend to have smaller teams and lack budget, which makes it harder for them to partner externally or invest in learning the needed skills.

To become more competitive, laggards will need to find a way to access expertise around web design and development, content, and SEO. This could come through more strategic hires, fighting for training budget, or working with outside partners.

Your partner's point of view

We also surveyed these partners to understand their perspective on the state of the industry and what's important for their clients' future success. What quickly came to light was a different view of the obstacles faced by healthcare marketers.

While health systems overwhelmingly say that lack of budget and time get in the way, vendors and agencies indicate a lack of effective strategy and internal buy-in as the primary barriers. Perhaps by strengthening strategy and gaining buy-in, health systems will be able to overcome their budget issues and hire more staff.

What other insights will you gain?

This guide will help you not only benchmark your organization and see where you currently stand, but also pick up some insights of your own as you review the data.

As you plan for 2017 and beyond, I know these survey results will help you make smart decisions about your current and future digital initiatives.



Ben Dillon
Chief Strategy Officer
Geonetric



Using the Data

No two healthcare organizations are the same, but to help you most effectively compare your organization and evaluate your efforts, we've segmented the data in two ways.

Leaders and Laggards

By segmenting the data by organizations that are leading the pack and those that are falling behind, we can identify the investments and activities of those that are dominating digital marketing. For this survey, we asked respondents if they were ahead or behind in these seven key areas: website design, website content, social media, content marketing, SEO, digital advertising, and website features and functionality. Then, we subtracted the number of "Behinds" from the number of "Aheads" selected. You can also use this formula to determine where you fall:

- **Leaders**—Self-selected that they are ahead of their competition in digital marketing efforts (Net Ahead-Behind > 1, 16.6% of respondents)
- **Average**—(Net Ahead-Behind between 1 and -1, 41.5% of respondents)
- **Laggards**—Self-selected that they are behind their competition in digital marketing efforts (Net Ahead-Behind < -1, 19.8% of respondents)

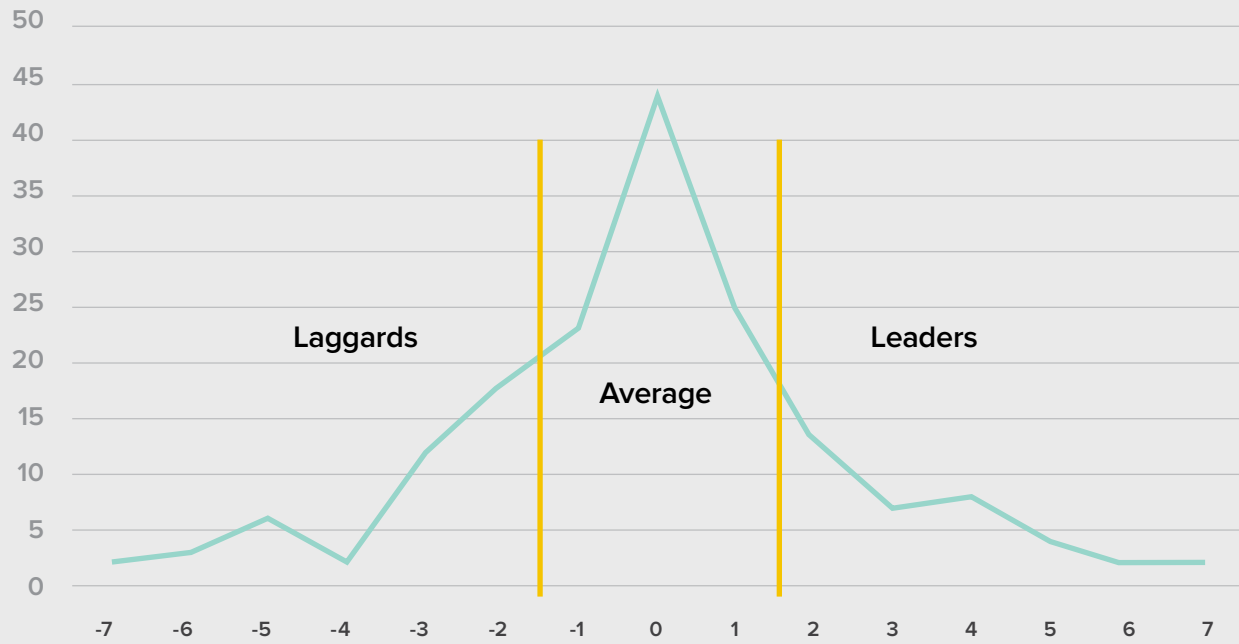
Size

Survey respondents self-selected a category that best represented their organization.^[1] From those answers, we grouped respondents into the following three categories:

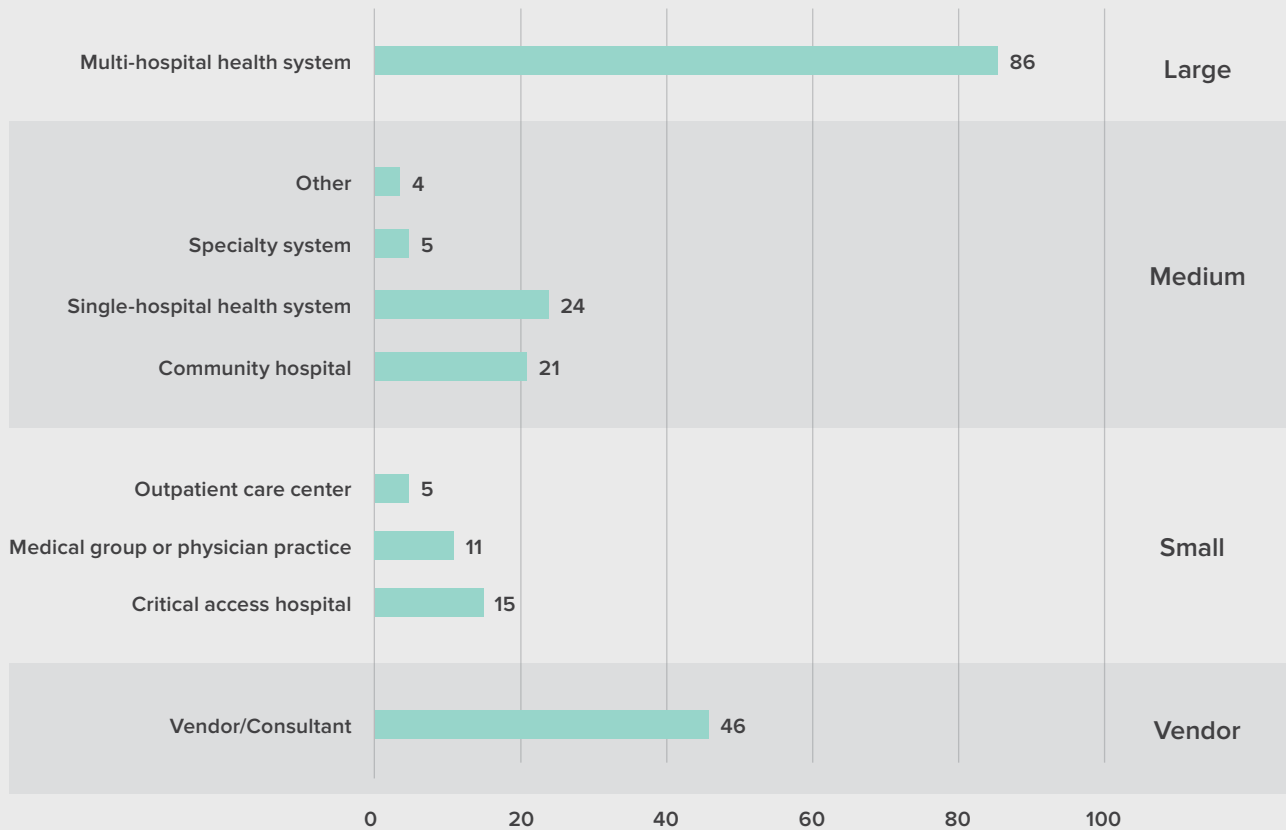
- **Large**—Large health systems with a very large geographical area. In our survey this translates to multi-hospital health systems with an average of 926 beds.
- **Medium**—Organizations with a limited footprint in a specific geographical area. In our survey this translates to community hospitals, single-hospital health systems, and specialty hospitals with an average of 314 beds.
- **Small**—Localized inpatient, outpatient and specialty care organizations. In our survey this translates to critical access hospitals, medical groups or physician practices, and outpatient care centers with an average of 81 beds.

[1] Many organizations near the boundaries placed themselves in a larger or smaller group. In some cases, we moved respondents to a more appropriate peer group or assigned them to a group if they didn't identify one.

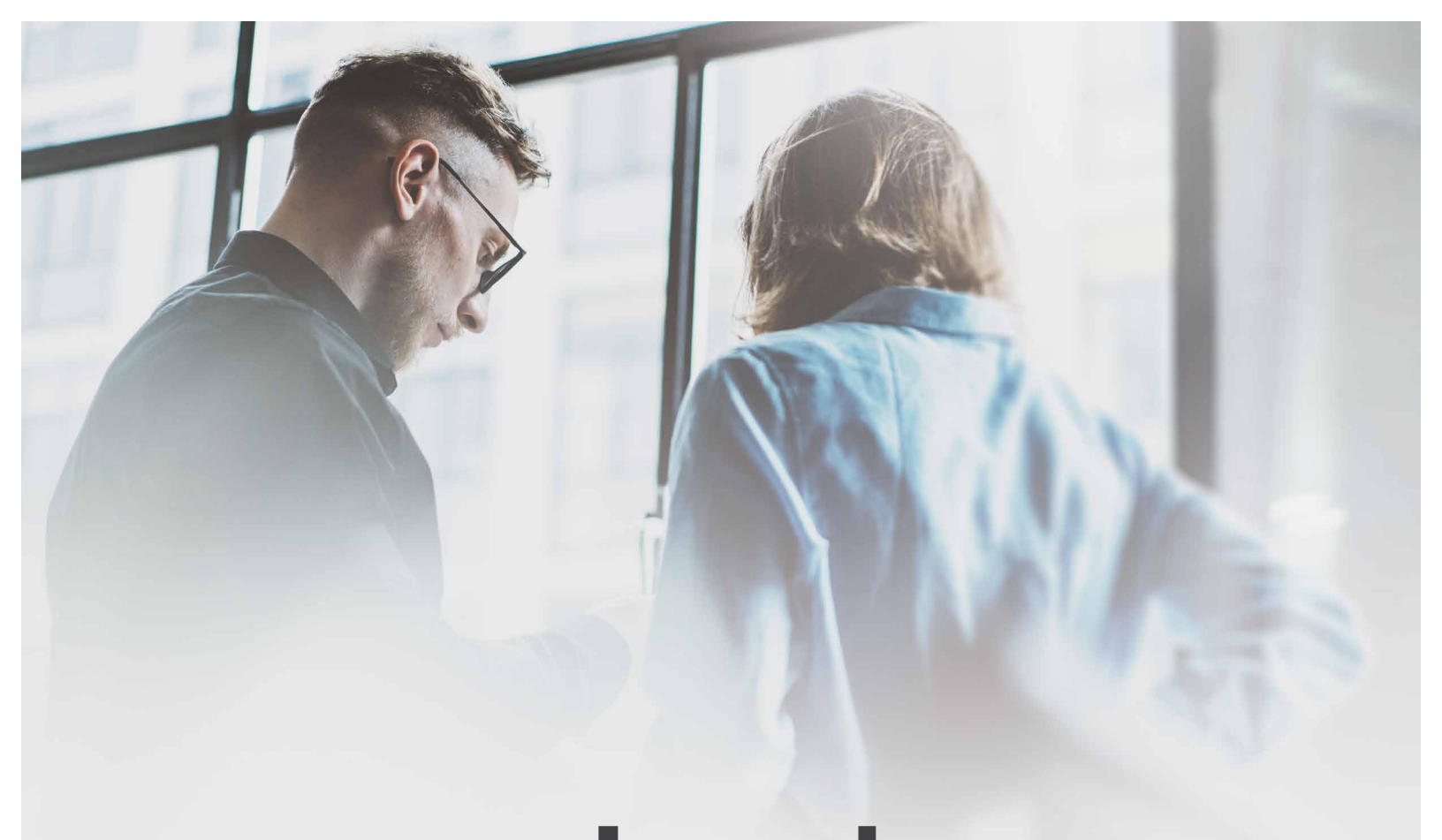
Distribution for Leader/Laggard



Respondent Organization Type*



*Note: A small number of respondents were re-categorized when placed in the small/medium/large groupings.



Leaders vs. Laggards

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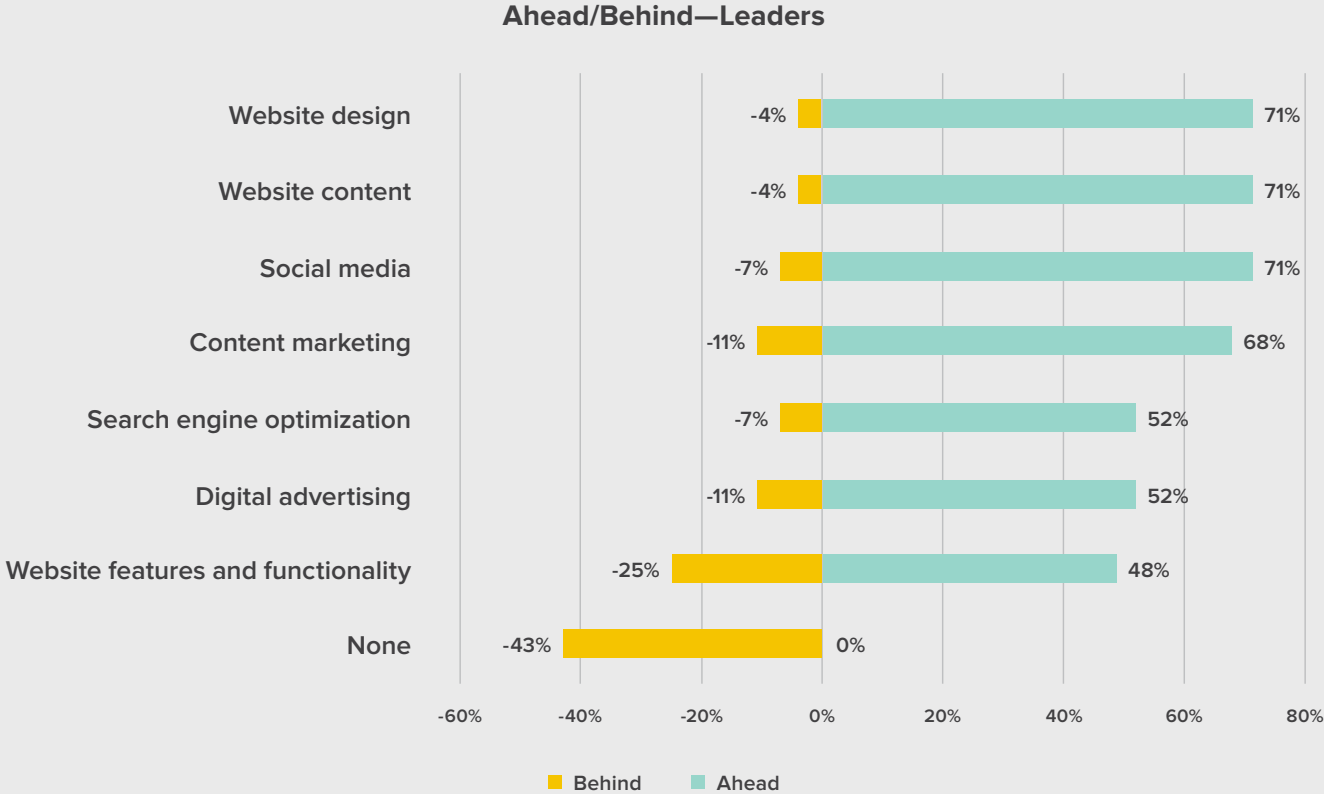
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Leaders vs. Laggards

The question behind the leader/laggard segmentation asks respondents where their organization is ahead or behind the competition in seven key digital marketing areas.

Leaders

Since the leader/laggard segments are defined by the number of items where the organization is ahead or behind, it's no surprise that leaders report doing better in these areas overall. Leaders, like the other two segments, report they are most successful with social media efforts. Even leaders lack confidence in their website's features and functionality.



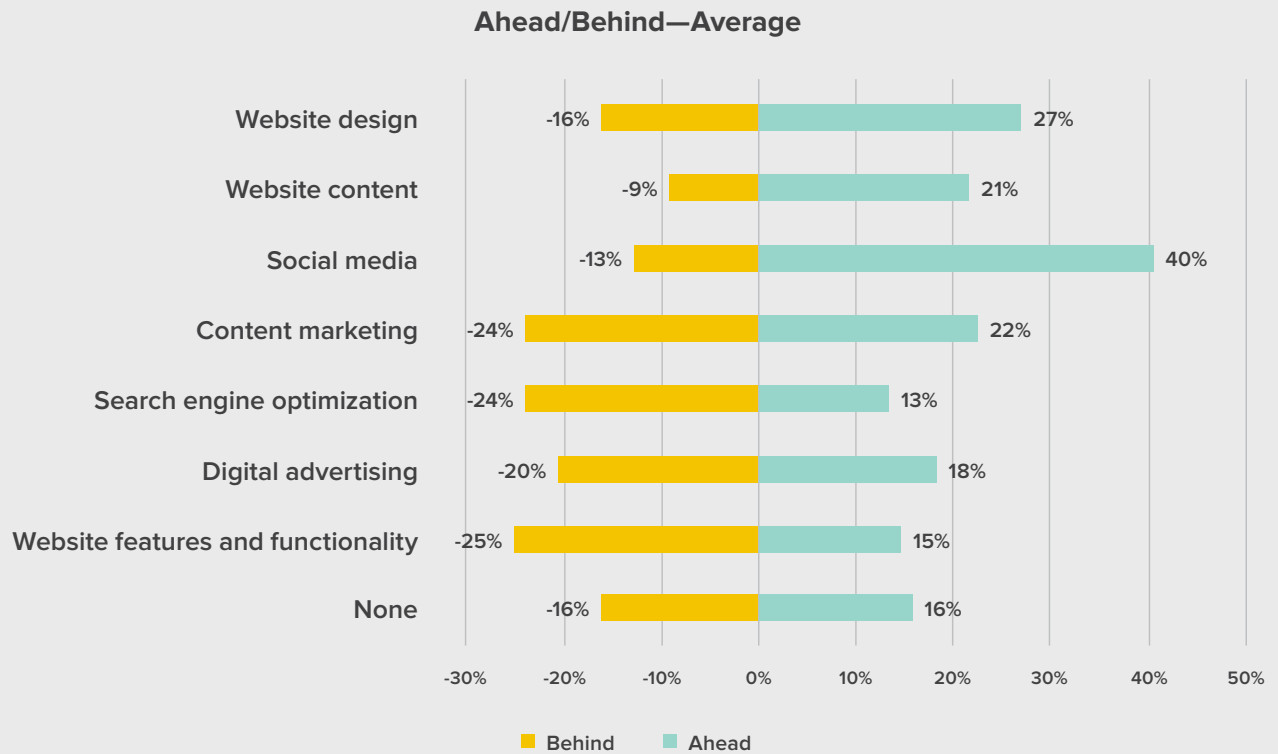


Even leaders lack confidence in their website's features and functionality.



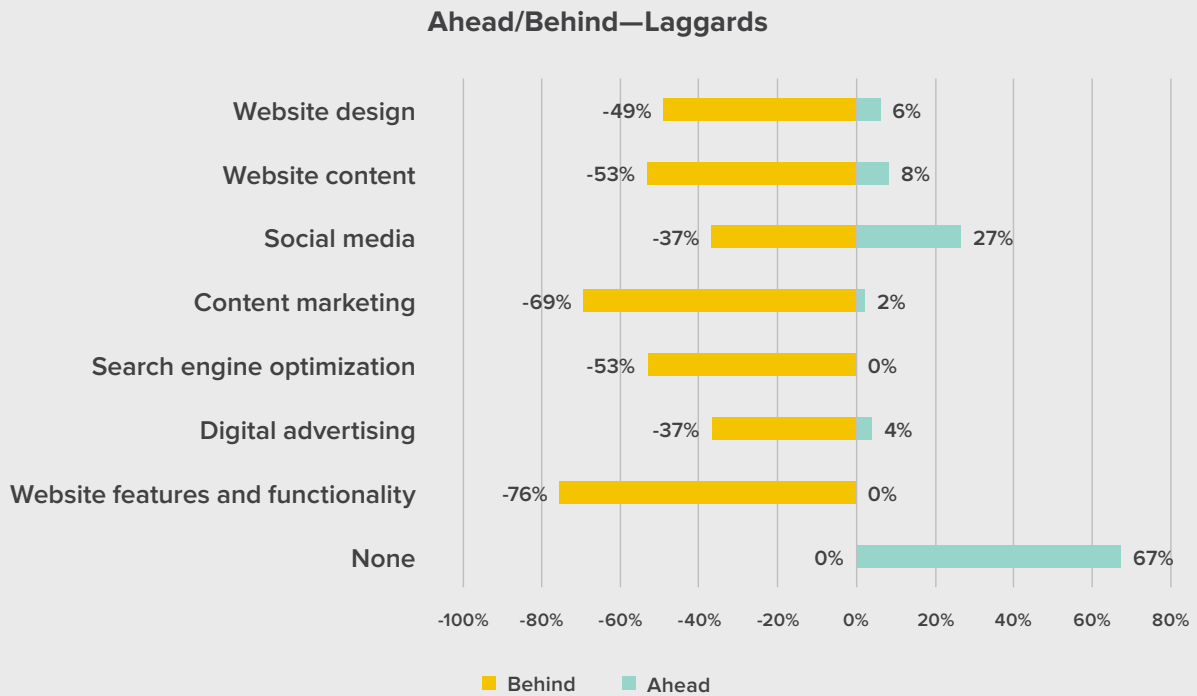
Average

Average respondents report having the most success with social media and website design, with less confidence in SEO.



Laggards

Laggards report very little success in any of the key areas and see themselves especially lacking in website features and functionality, and all the areas around content. Social media is the only area where a significant group of laggards feel positive about the work they are doing.





The Digital Marketing Team

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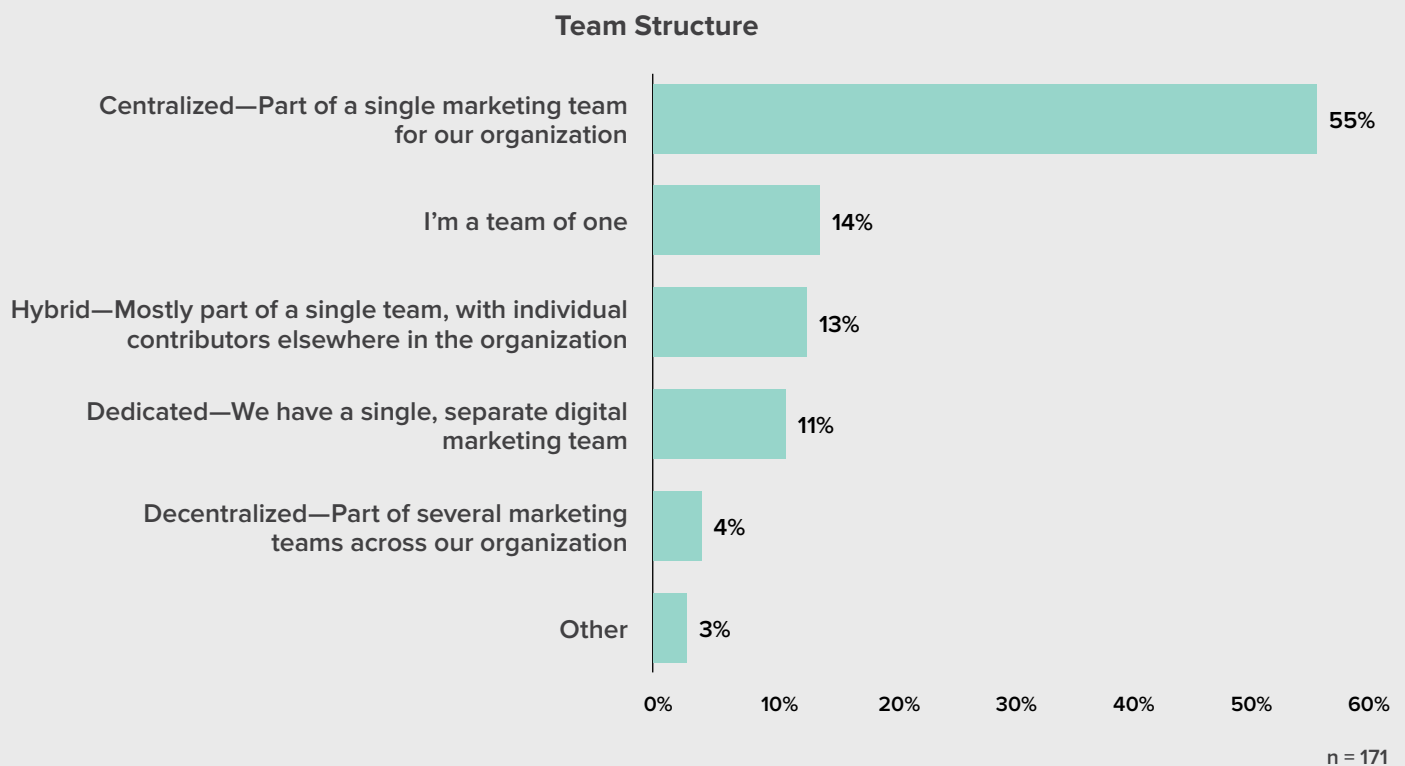
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Team Structure

When asked where the digital marketing team lives, with the marketing team or separately, 55% indicated that they have a centralized team, meaning digital lives on the marketing team.

When looking at the responses by segments, it becomes clear that a majority of leaders and average-sized organizations are centrally organized. Laggards, with small teams overall, tend to be solo performers or hybrids.

Stronger players are more likely to have consolidated traditional marketing and digital teams.



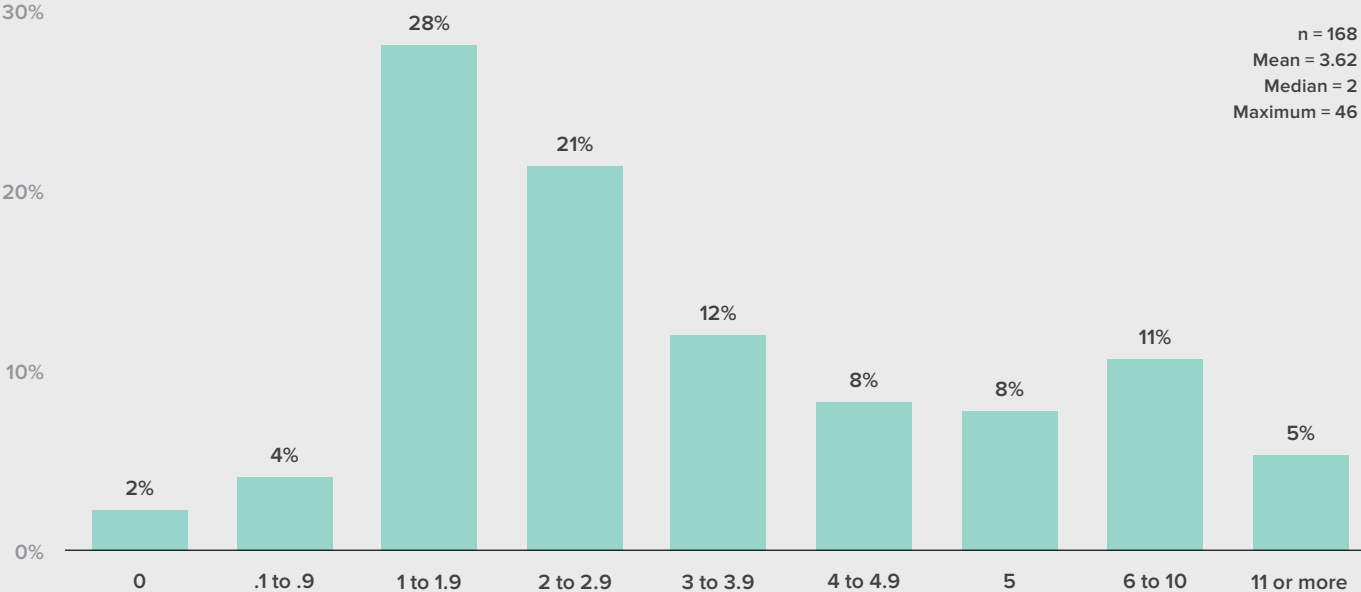
Others included:

- We hire a digital marketing agency.
- Team of one that works with an agency.
- Primarily outsourced through vendors or agencies.
- In the process of expanding to a dedicated team. Right now, team of 1.
- Centralized team for the whole continuum.
- No one person dedicated to digital.

Overall Team Size

When looking at number of full-time equivalents (FTEs) that are part of a core digital marketing team, the overall average is 3.62. The distribution tells a bit of a different story, with a median of two. Half of organizations actually have one or two FTEs, with a few organizations on the high-end having very large teams.

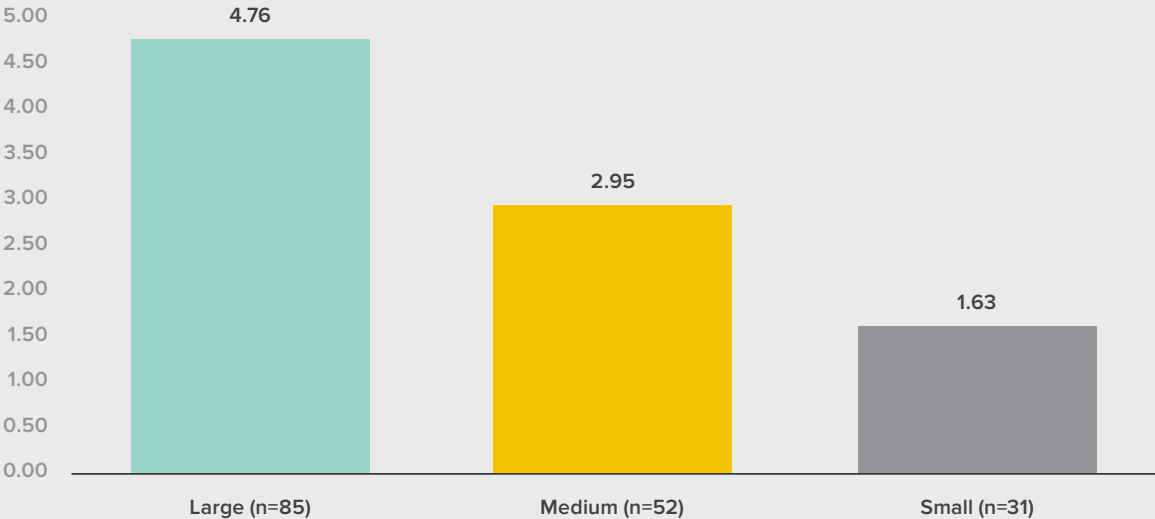
How many full-time equivalents (FTEs) are part of your digital marketing team?



Team Size by Organization

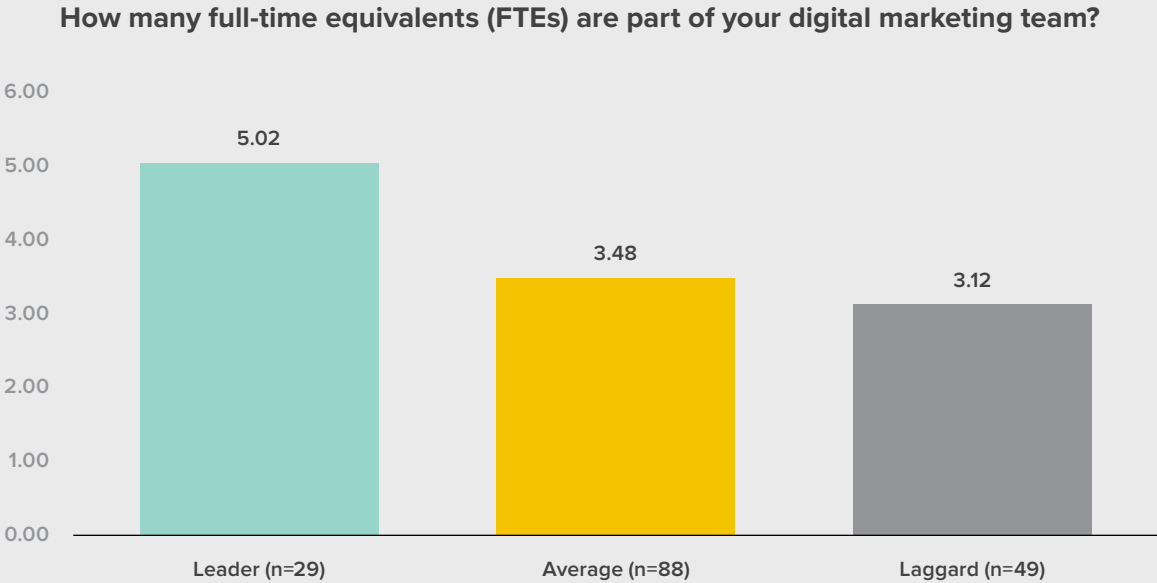
When it comes to staffing and size of organizations, it's not surprising that large organizations employ more staff than small, with small having 1.63 FTEs and large having 4.76, on average.

How many full-time equivalents (FTEs) are part of your digital marketing team?



Team Size by Leader/Laggard

Overall, average and laggards have similar staffing levels. Leaders are staffing in a more aggressive way, having five FTEs on average dedicated to digital.



Team Size per Bed

When looking at staffing by a per bed basis, large organizations report one digital FTE for every 398 beds, medium have one for every 176 beds and small have one for every 87 beds. In other words, small organizations have nearly 5x the number of staff of their larger counterparts relative to their size.

Leaders also have fewer staff per bed. Leaders report one digital FTE per 327 beds, average organizations report one for every 282 beds, and laggards have one for every 209 beds.

Average of Beds per Staff Member

Laggard	208.87
Average	281.84
Leader	327.40

Average of Beds per Staff Member

Small	86.57
Medium	176.15
Large	398.28



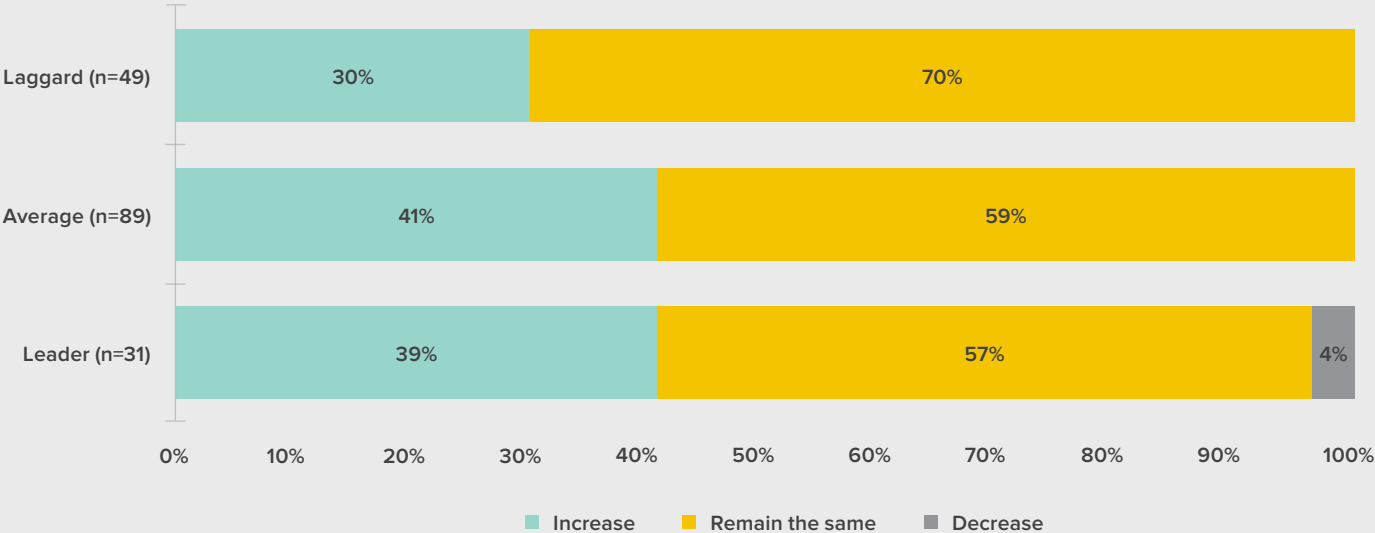
Small organizations
have nearly 5x the
number of staff of their
larger counterparts.



Staffing Outlook

Hiring trends are fairly consistent amongst leaders, average, and laggards.

What do you expect to happen to the number of FTEs dedicated to digital marketing in the next 12 months?

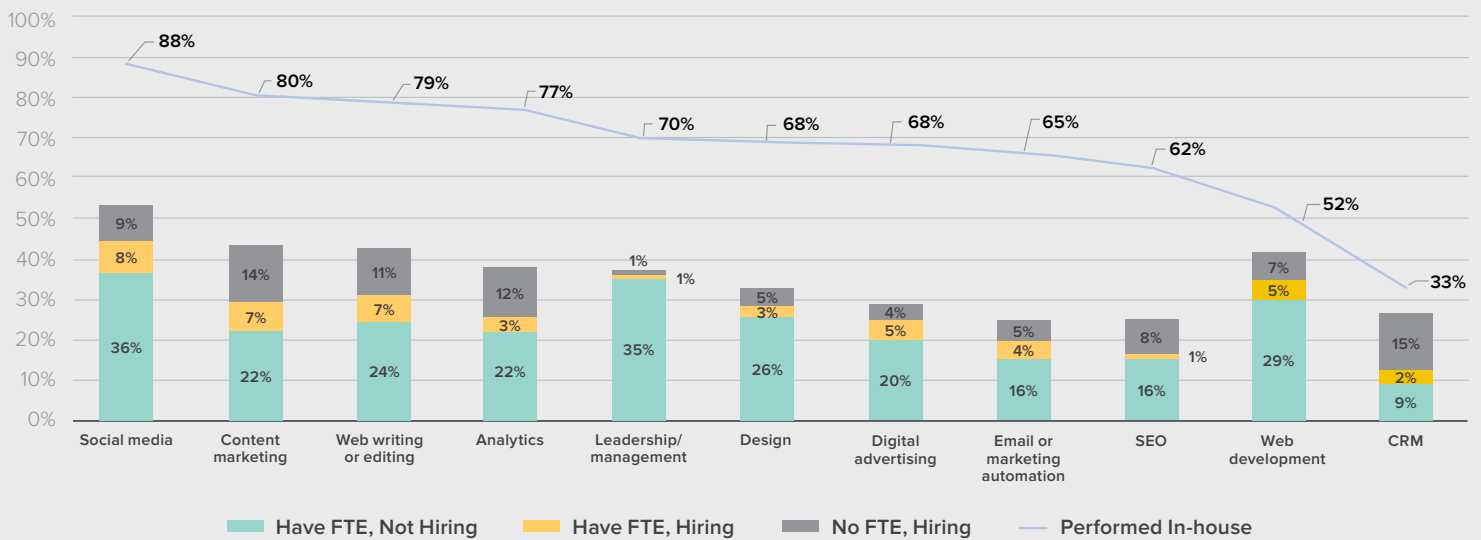


Staff Roles & Hiring

Significant hiring is planned for content marketing (21%), writing or editing (18%), social media (17%), and CRM (17%). These roles are also gaining the most new staff among organizations that already have at least one FTE. CRM-related hiring will be significant as only 11% have an FTE dedicated to CRM today on the digital team.

Leaders are more likely to already have dedicated staff in the areas of social media (+44%), content marketing (+29%), and analytics (+25%) than laggards. The roles handled in-house are similar among the three groups.

In-house Staffing by Role





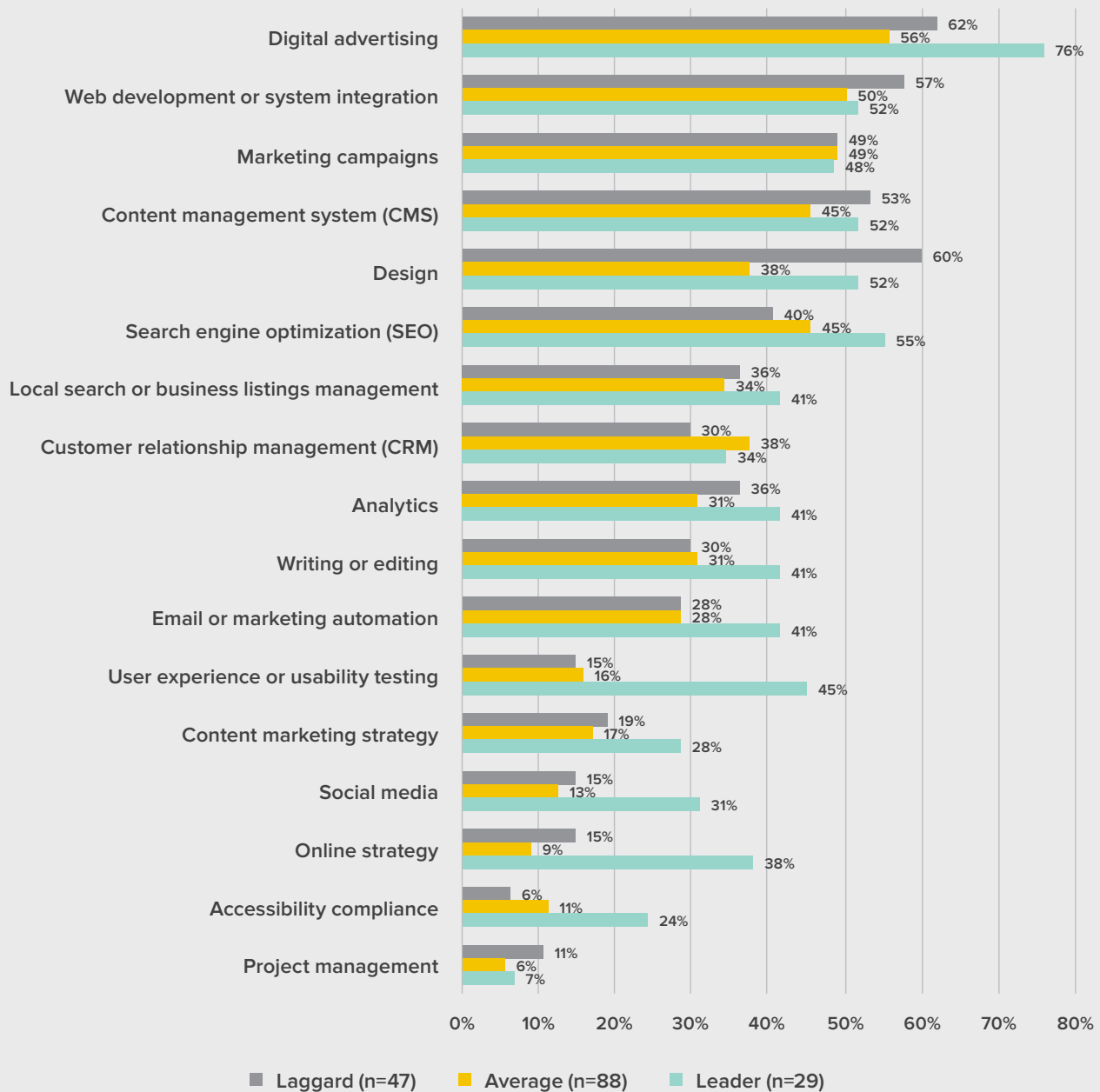
Only 11% of respondents have an FTE on the digital marketing team dedicated to CRM today.



External Resources

Leaders, despite having the largest teams, outsource most aggressively. This is particularly true in online strategy, user experience, digital advertising and social media. This supports the general split of investment with a small portion of every dollar invested going to staff rather than non-staff expenses.

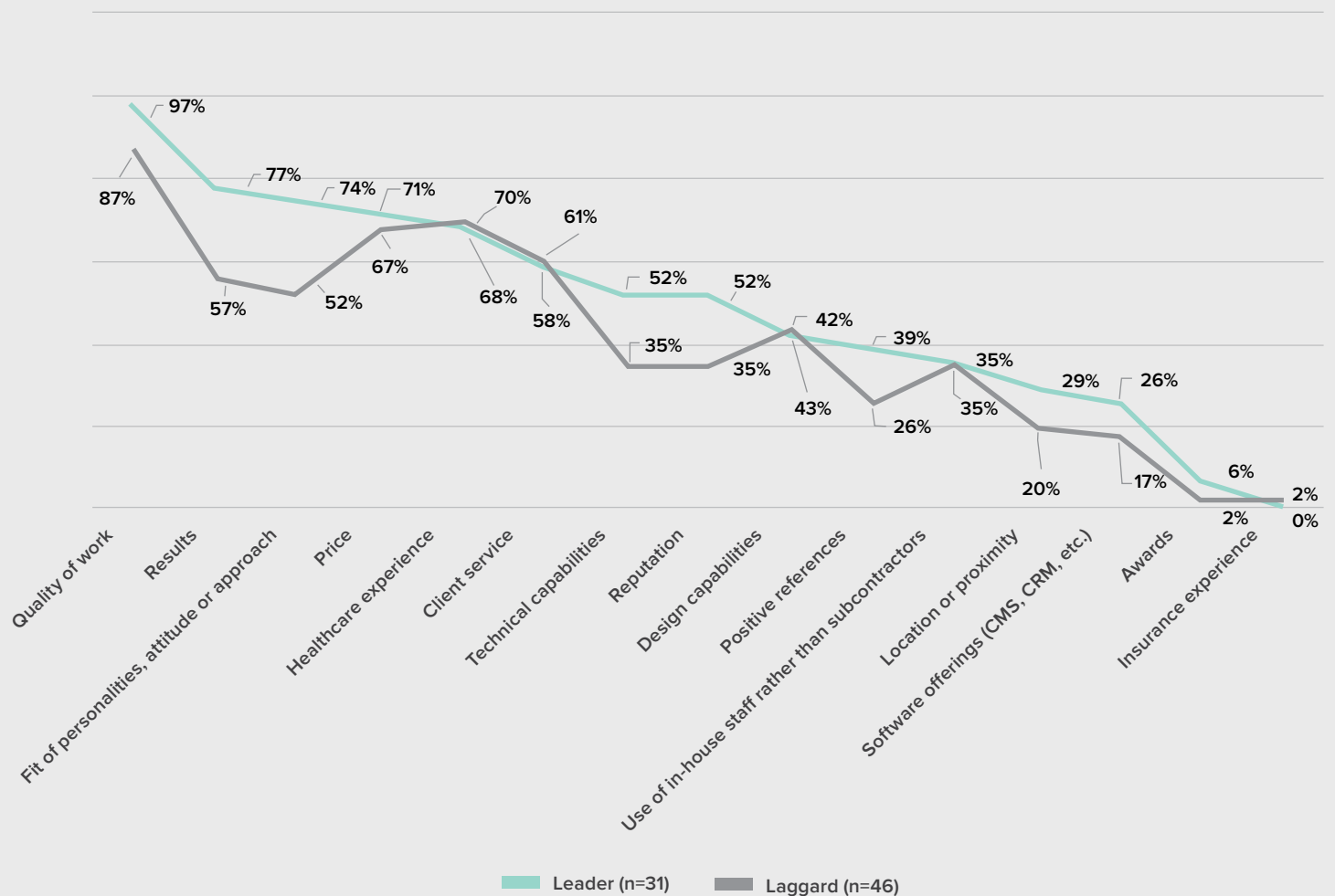
Which do you purchase externally?



External Partnerships

While quality, results, price, service, healthcare experience and personality fit are important to all, leaders value some characteristics more than laggards, particularly fit (+22%), results (+20%), technical capabilities (+17%), and reputation (+17%).

Most Important When Choosing a Digital Partner

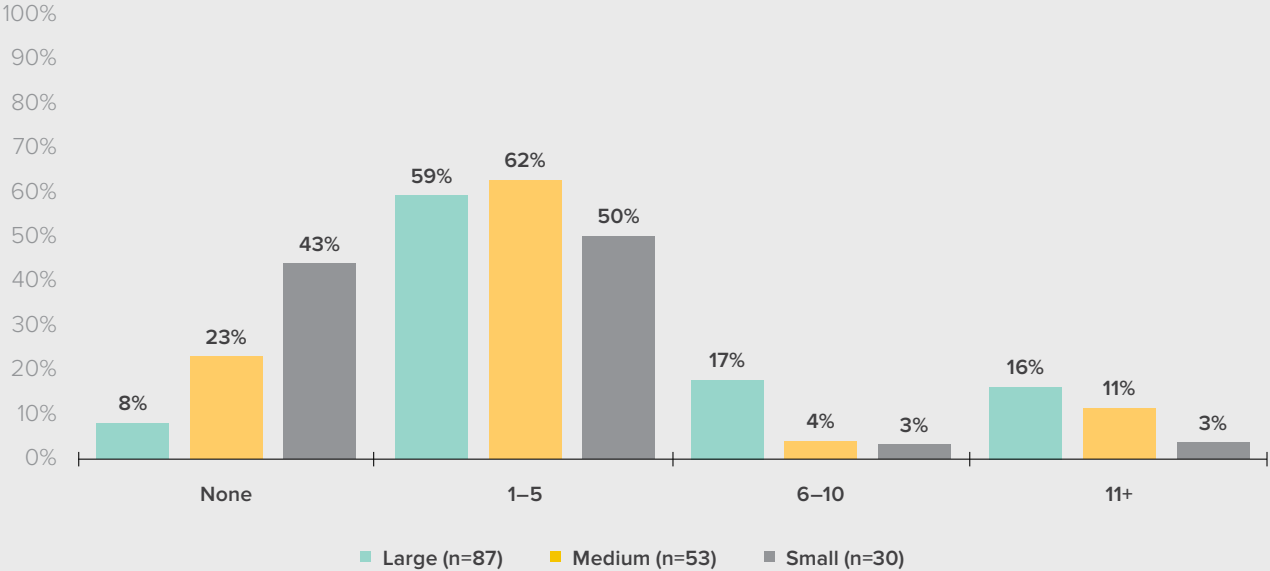


Outside Contributions

Most organizations have only a small group (1–5) outside of their core team that contributes to activities such as authoring content, updating physician listings, and managing events.

The number of content contributors is related more to organization size than if the organization is a leader or a laggard. Forty-three percent of small organizations have no content contributors outside of their core digital marketing team and 16% of large organizations have more than 11.

Outside of your digital marketing team, how many FTEs contribute to the content on your website (e.g. author content, update physician listings, manage events, etc.)?





Digital Marketing Budgets

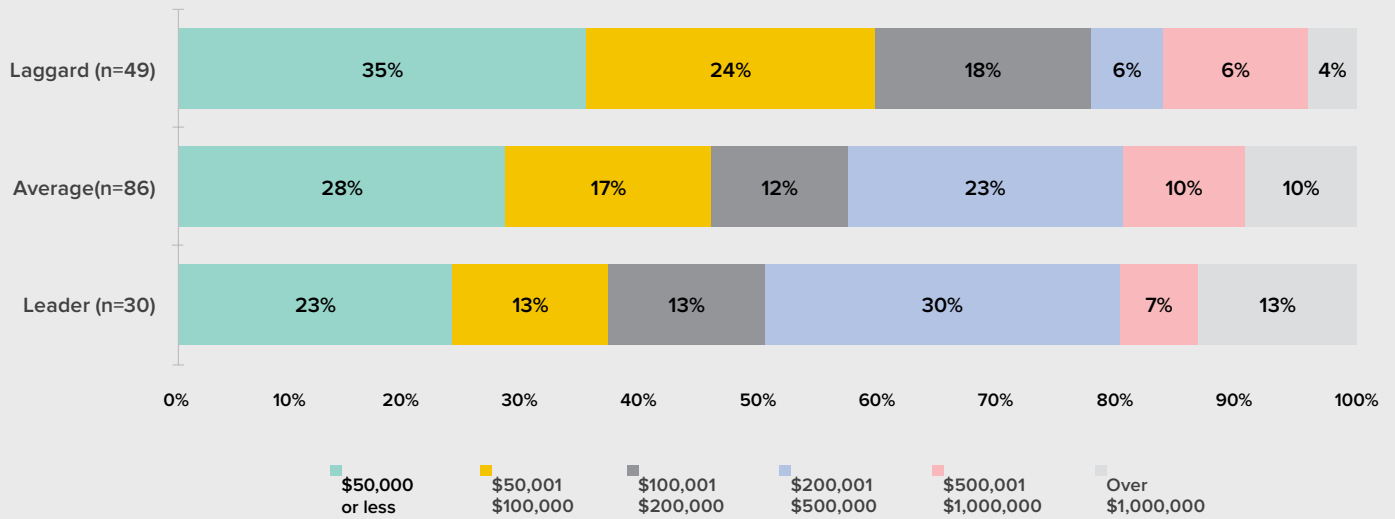
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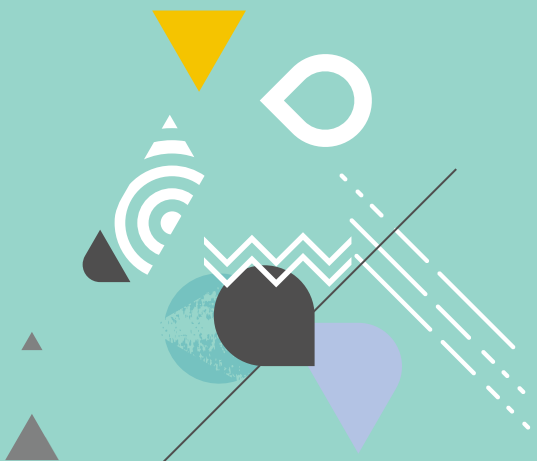
Average Annual Investment

Both leaders and large organizations spend more overall, with 13% of leaders and 9% of large organizations spending over \$1 million on digital marketing annually.

Annual Average Investment in Digital Marketing (Without Staff)



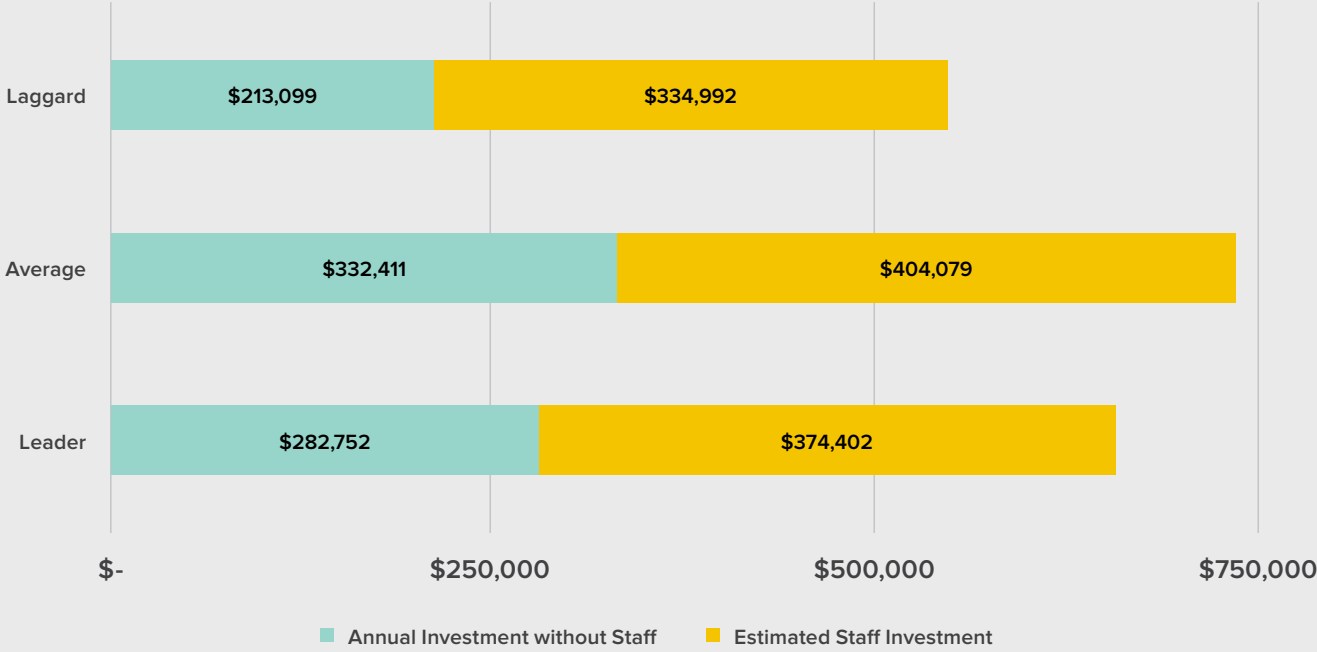
On average,
organizations spend
\$205,757 on digital
marketing annually,
excluding staff.



Average Investment by Leader/Laggard

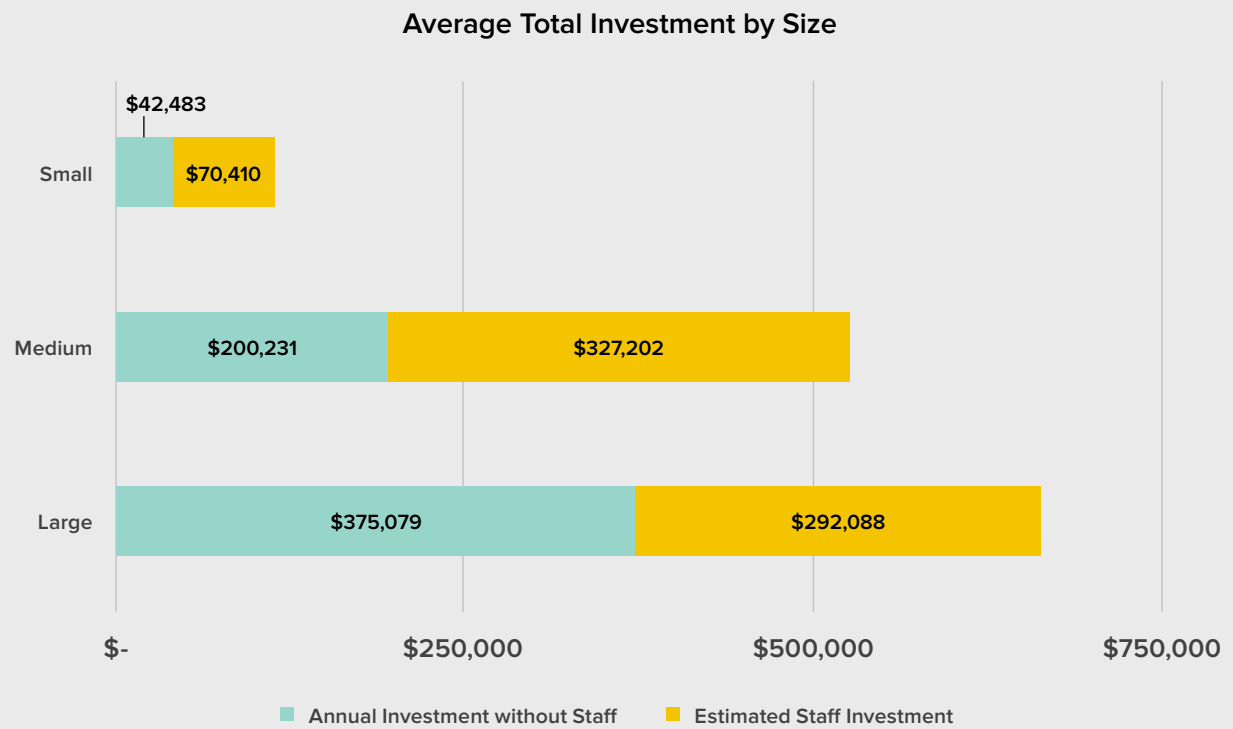
When looking at average total investment, leaders spend 19.9% more than laggards, or \$109,063 more. And surprisingly, average organizations outspend leaders by 12.1%, or \$79,336.

Average Total Investment by Leader/Laggard



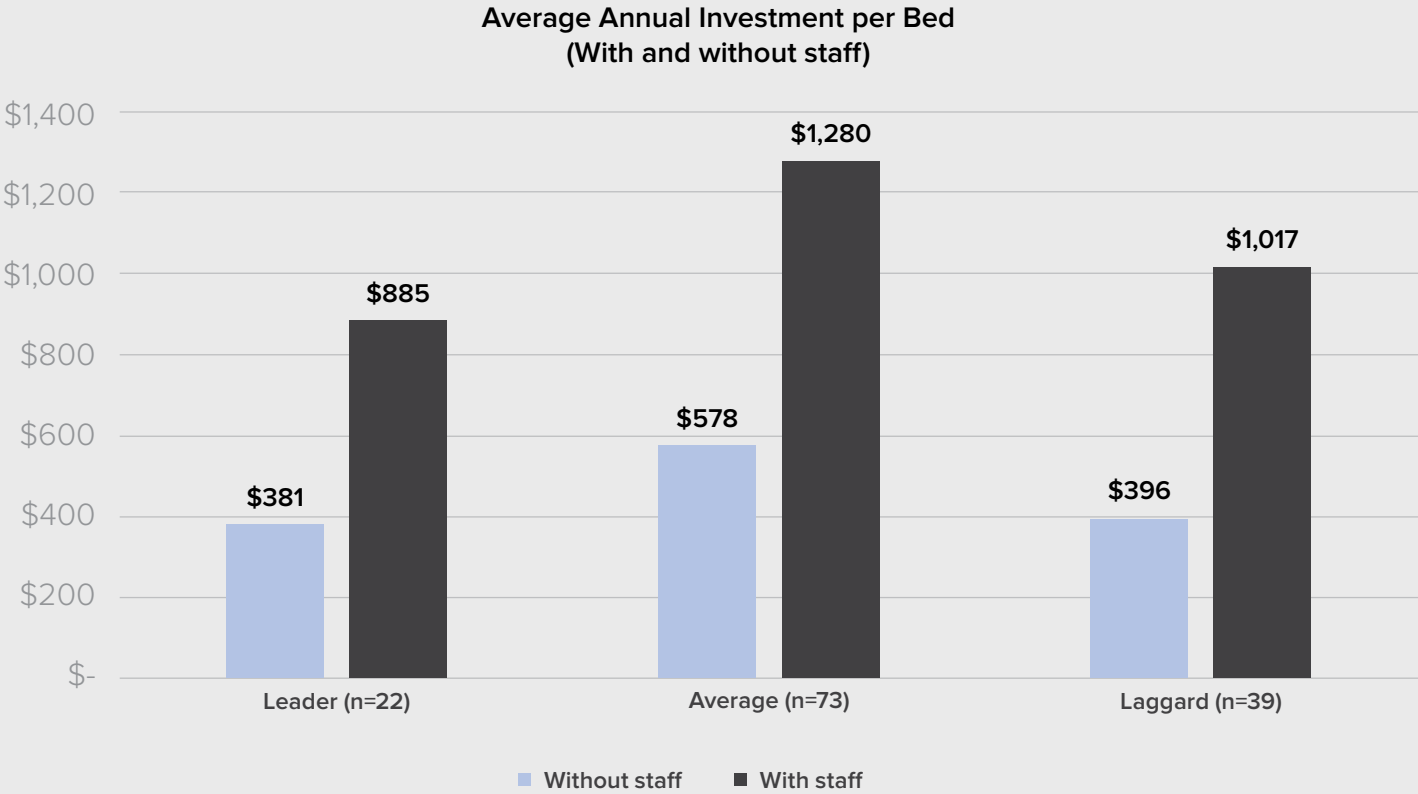
Average Investment by Size

Spending differences are larger amongst organizations of different sizes with large organizations spending 162% more than small organizations.



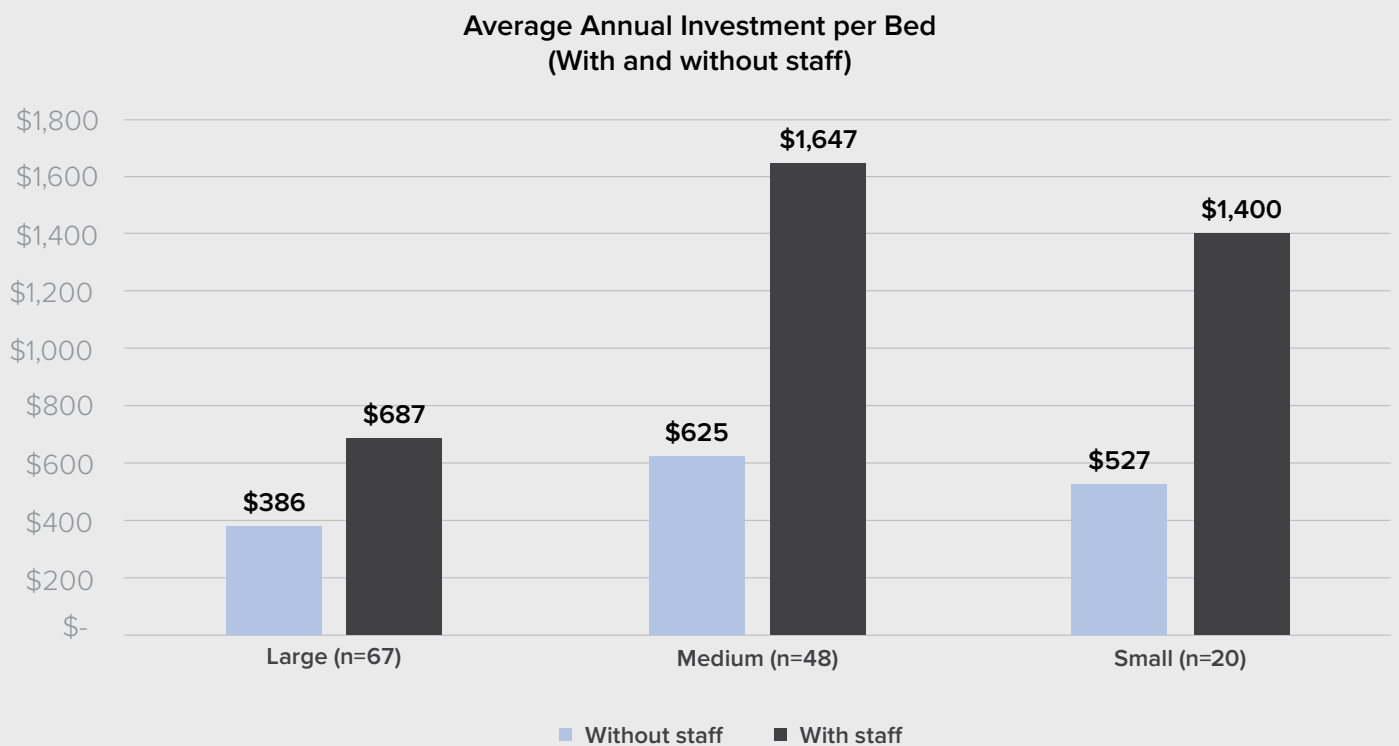
Investment per Bed by Leader/Laggard

Although leaders spend more overall, on a per-bed basis they spend less. This is likely due, in part, to efficiency and economies of scale. Average organizations are spending far beyond what might otherwise be expected. When looking at the investment mix, leaders only spend 14% more on staff than on external items like software, consultants, and vendor partners while laggards spend 48% more.



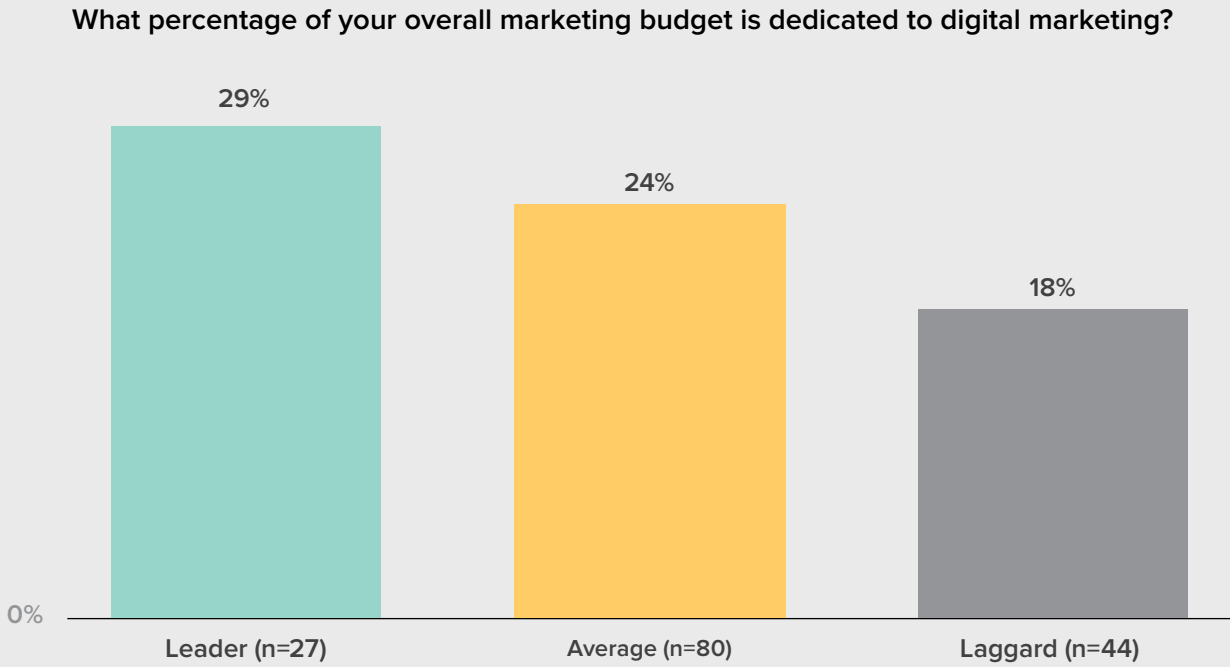
Investment per Bed by Size

This becomes even more apparent when segmenting by size. Large organizations spend 22% less on staff than external items; small and medium organizations spend 66% and 63% more on staff than external items. Those seeing a decrease in their digital marketing budgets are spending the most overall while spending the least externally on a per-bed basis. The data seems to suggest that spending on staff is less efficient than spending externally.



Percentage of Budget Dedicated to Digital

Leaders spend 5% more of their marketing budget on digital than average organizations, and 11% more than laggards. When segmenting by size, there is little variance between small, medium, and large organizations, with small, medium, and large all averaging 21%, 23%, and 24% of their overall marketing budgets dedicated to digital respectively.



Digital Budget Forecasts

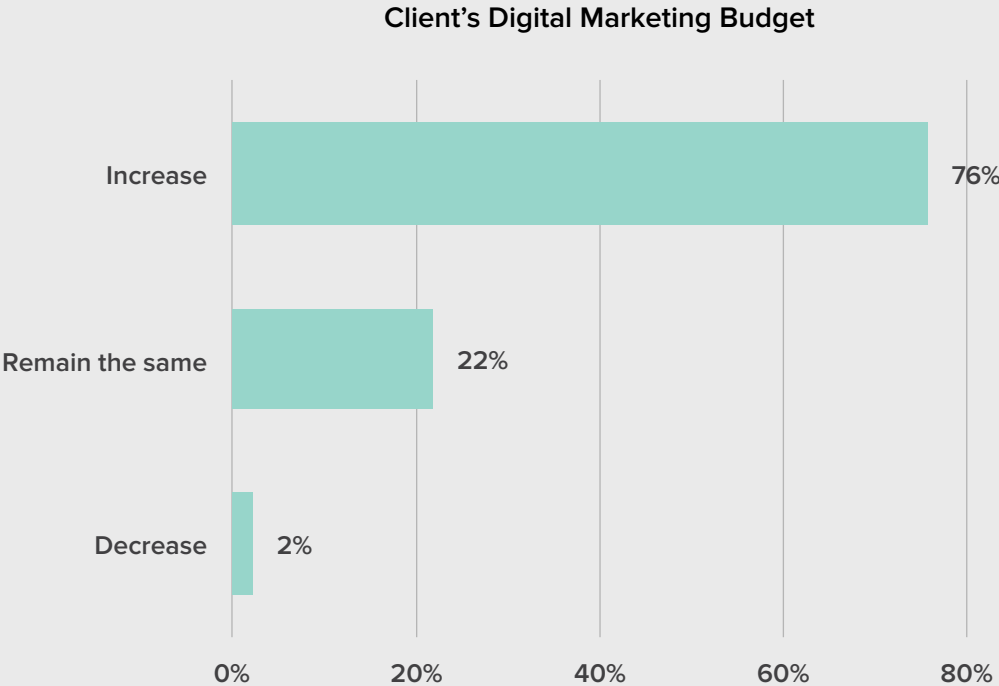
More than half of all marketing budgets are remaining consistent, while more than half of all digital marketing budgets are increasing. Seventy percent of all organizations that are losing overall marketing budget are still increasing digital budget. Very few organizations will experience a decrease in their digital budgets in 2017, and those that do have very large payrolls, likely due to increased staffing for a major redesign effort which won't be maintained over time.

Overall Marketing Budget

	Decrease	Remain the same	Increase	
Digital decrease	1.8%	0.6%	0.6%	3.0%
Digital remain the same	1.8%	25.4%	3.6%	30.8%
Digital increase	7.1%	29.0%	17.8%	53.8%
	10.7%	55.0%	21.9%	

Agency Perspective: Digital Budget Forecasts

Agencies are even more bullish, with the belief that 76% of their clients' digital marketing budgets will increase.





Even when overall marketing budgets are staying the same or diminishing, digital budgets are increasing.





Goals, Metrics & Planning

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Top Digital Goals

When asked what top goals related to online initiatives they were focusing on, some respondents connected digital goals to organizational goals, like improving patient acquisition and increasing volume in key service lines. Others are focusing on systems integration, particularly around CRM. The majority report more specific digital goals around improving SEO, social media reach, or web content.

“Implement a CRM system and have adequate staffing to handle the system.”

“Increase patient volume and expand reach to secondary service areas and growth markets.”

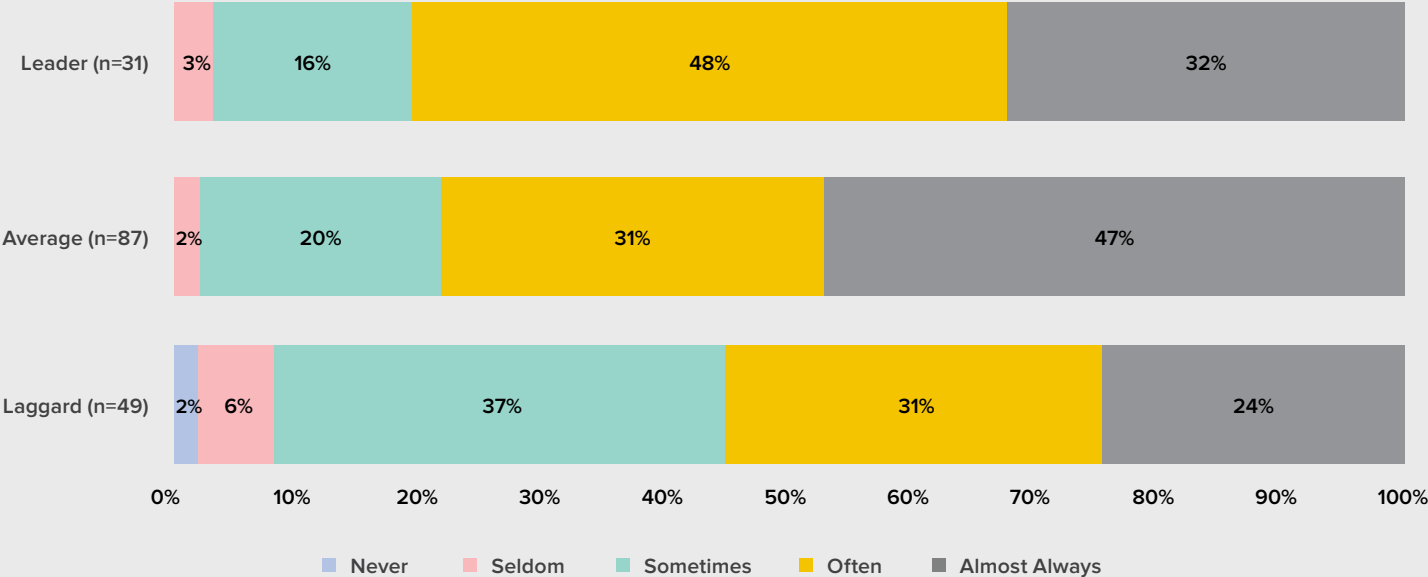
“Improve organic search rank, improve paid quality scores to reduce CPC, obtain greater engagement through social media.”

The graphic features three callout boxes: a teal box at the top with a white zigzag icon, a yellow box at the bottom left with a white zigzag icon, and a blue box at the bottom right with a grey target icon and a grey location pin icon. Each box contains a quote. The teal box quote is “Implement a CRM system and have adequate staffing to handle the system.” The yellow box quote is “Increase patient volume and expand reach to secondary service areas and growth markets.” The blue box quote is “Improve organic search rank, improve paid quality scores to reduce CPC, obtain greater engagement through social media.”

Integrated Digital Strategy

Surprisingly, leaders aren't better at integrated planning. Average organizations are far more likely to integrate marketing plans for digital and traditional, with 47% reporting they almost always approach things with a multi-channel strategy.

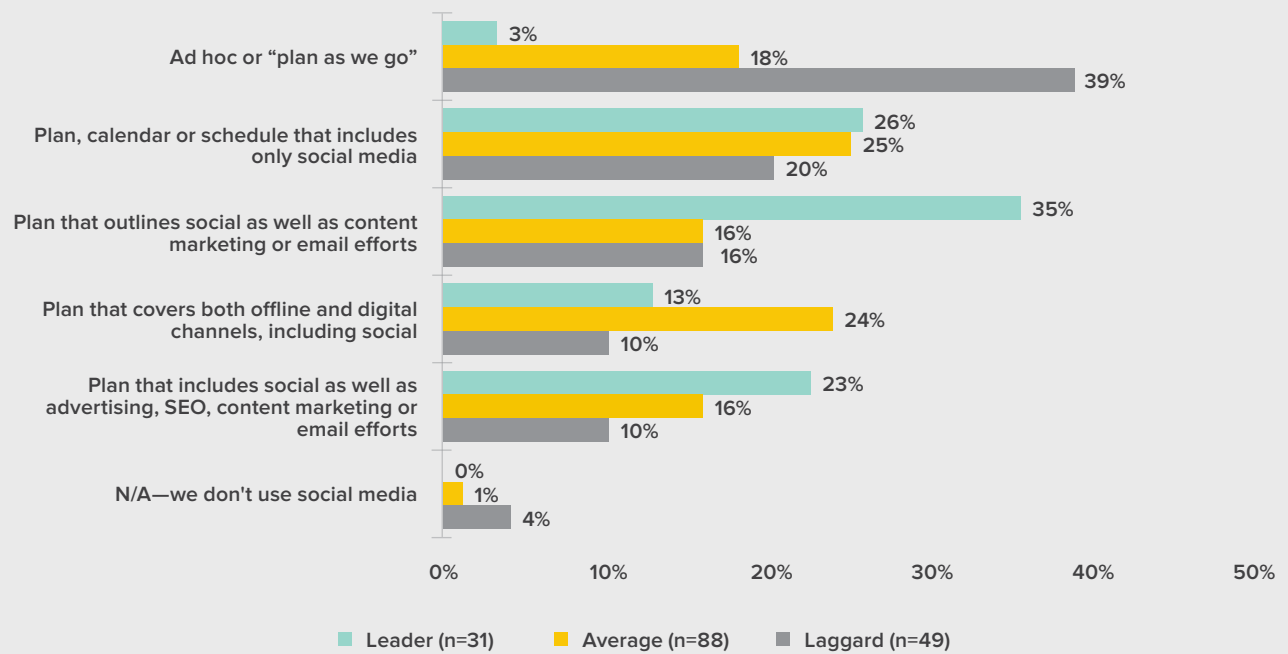
How frequently are your offline and online marketing activities planned together as an integrated strategy?



Social Media Strategy

Leaders report more focused planning that includes multiple types of digital (social, content marketing, email), while average organizations report plans that cover both offline and online marketing, resulting in more sophisticated and integrated planning.

How do you plan social media strategy?





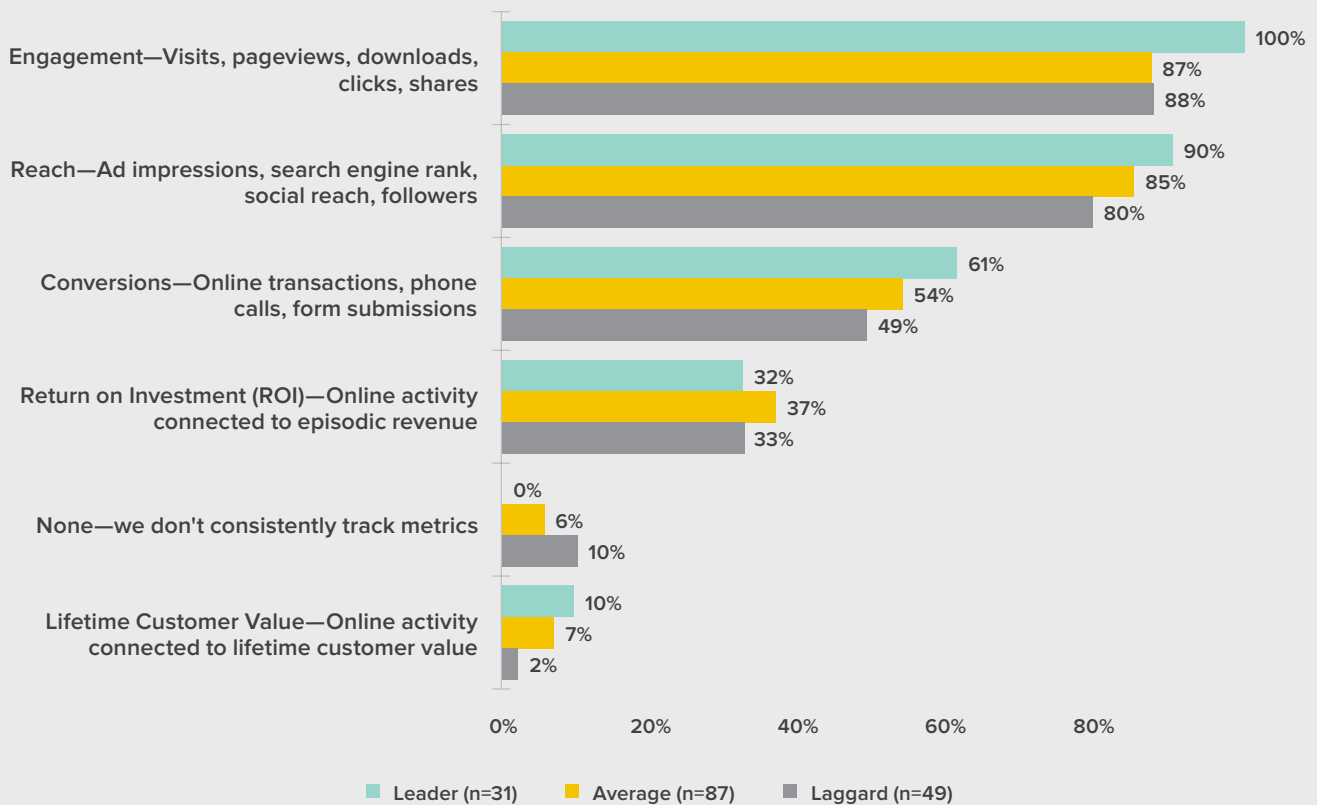
When an organization dedicates at least one FTE to social, they tend to have more sophisticated digital plans.



Digital Tracking

When it comes to tracking there is not that much variability between leaders, average, and laggards, with a general tendency for leaders to track more aggressively. Leaders tend to be a bit ahead of their average and laggard counterparts when it comes to engagement and reach, but when it comes to ROI, leaders are no longer ahead. ROI is important to this audience as we'll see in a moment, but they have as big a challenge measuring ROI as everyone else. All three segments report minimal tracking of lifetime customer value.

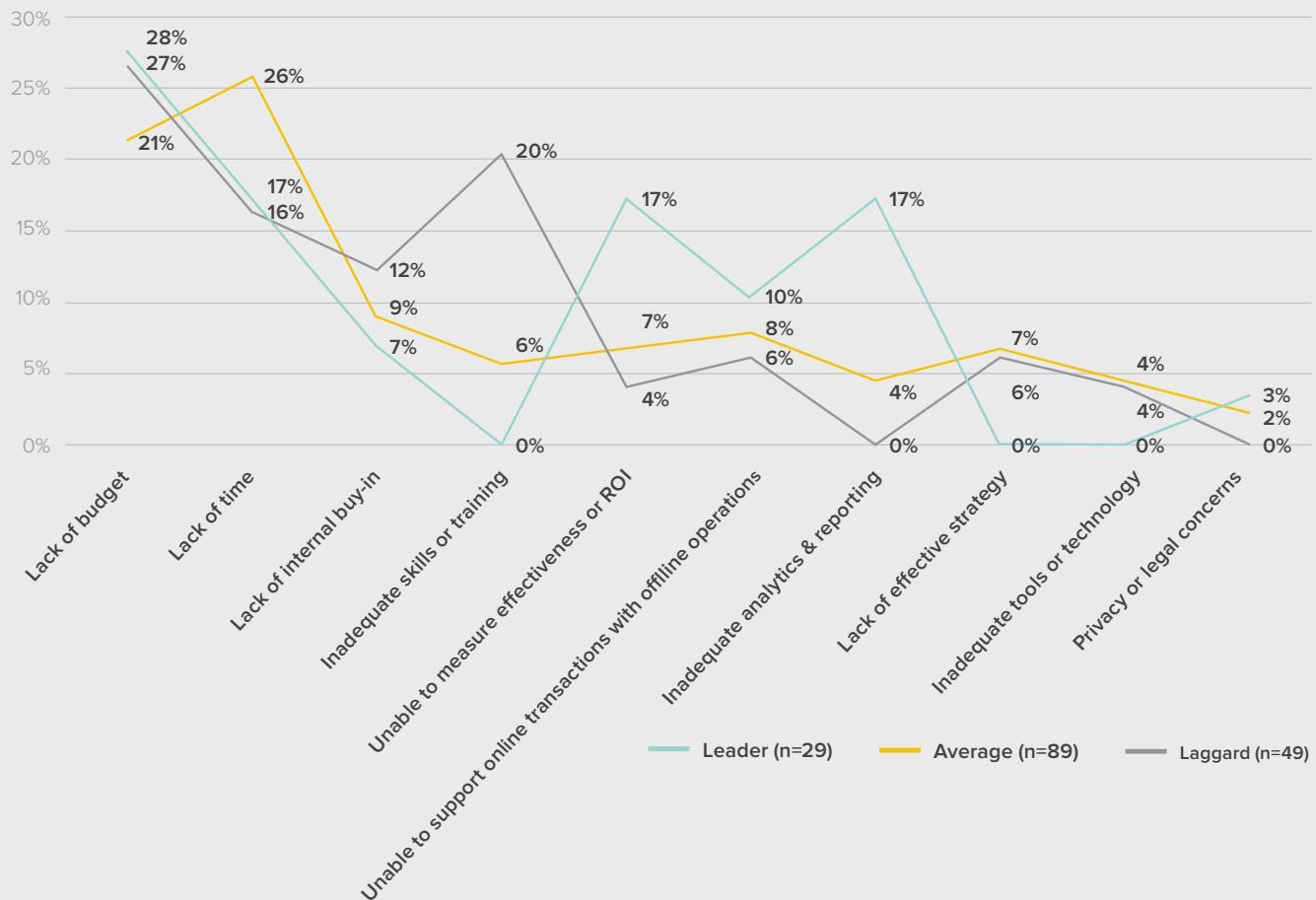
Which metrics do you consistently track?



Barriers to Digital Success

Perceived barriers vary greatly among segments. While lack of budget is most concerning overall, average organizations are dramatically more concerned about lack of time. Laggards tend to suffer from lack of skills and this prevents them from achieving success particularly around analytics and reporting. Leaders alone tend to be concerned with ROI and analytics reporting.

What is the single greatest barrier preventing your digital marketing efforts from being more successful?

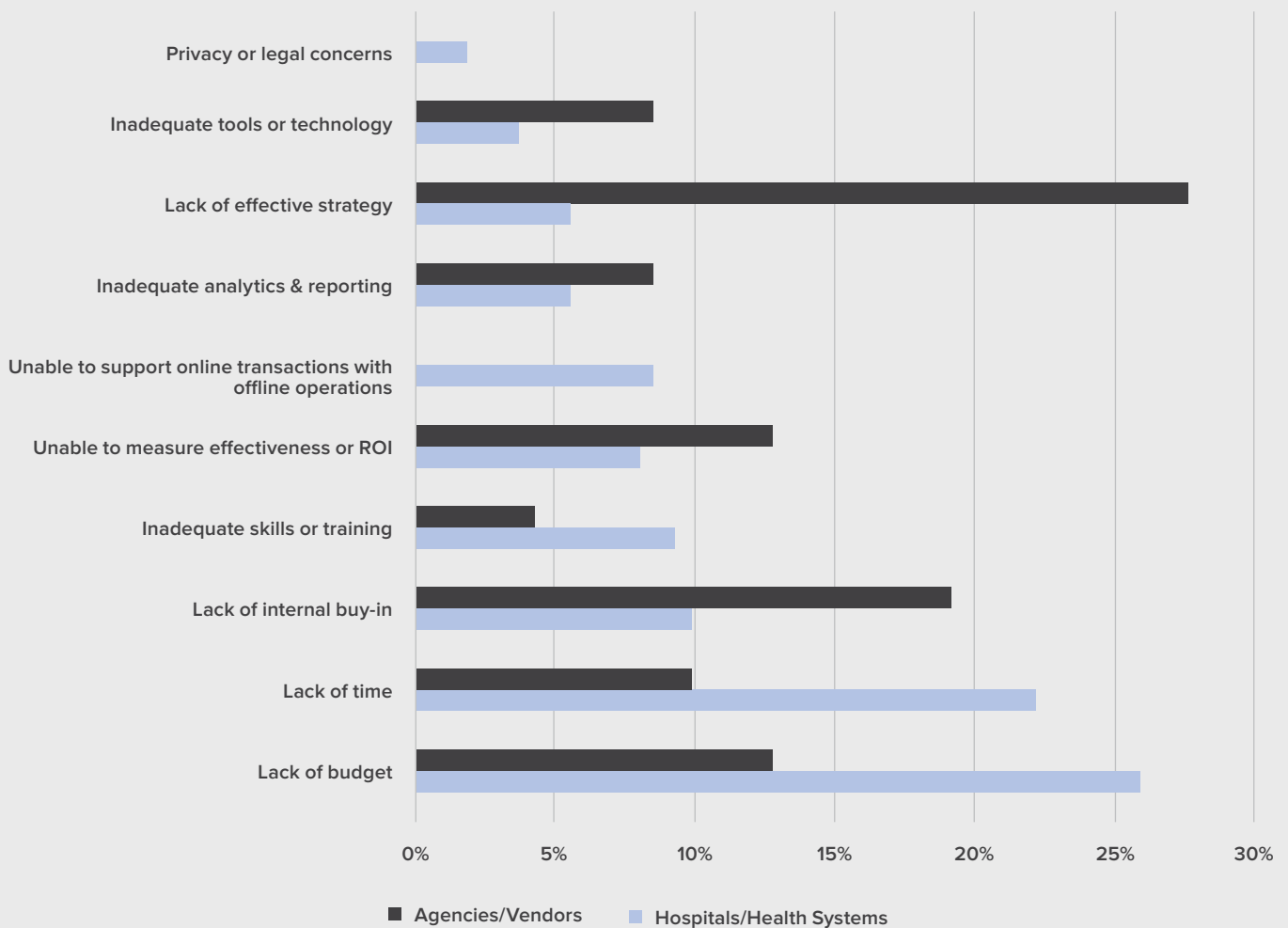


Agency Perspective: Barriers to Digital Success

Overall, healthcare organizations cited lack of time and budget as their biggest barriers to progress, but the agencies and consultants that they work with tell a different story.

These partners see a lack of strategy, an overall lack of internal buy-in, and, to a lesser extent, an inability to measure effectiveness or ROI as the underlying issues which stand in the way of progress.

Biggest Barriers to Progress
(Comparing Agency/Vendors with Hospital/Health Systems)



Agencies say the single biggest impediment to marketing success for healthcare brands is the lack of strategy, while healthcare marketers cite budget as the major barrier.



A photograph of a business meeting. In the foreground, a man with a beard is sitting at a desk, holding a pencil over a laptop. In the background, another person is standing and holding a document. The scene is brightly lit, suggesting an office environment.

Digital Marketing Tactics

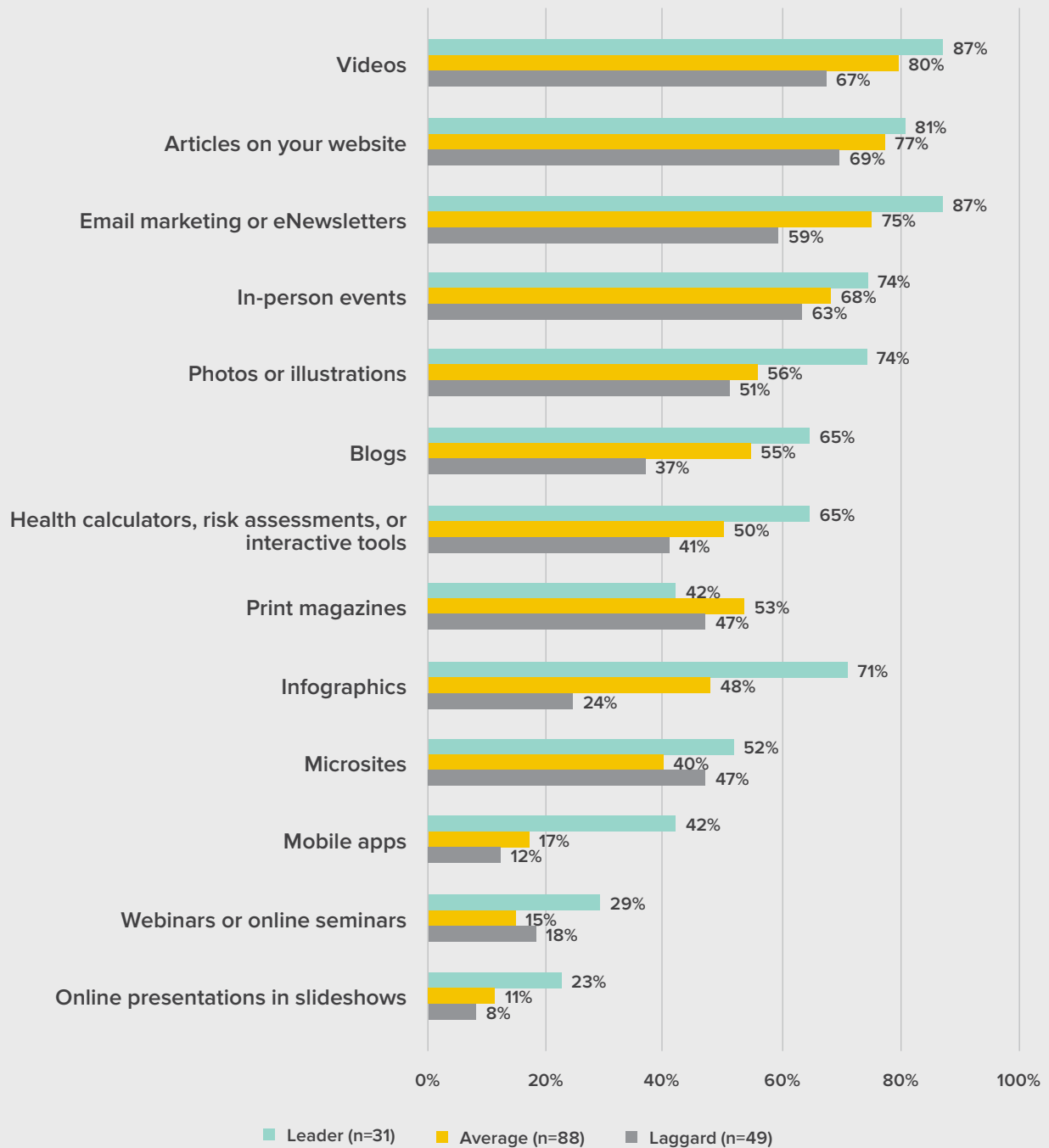
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Content Marketing Tactics

The most-used content marketing tactics include video, articles on your website, email marketing and in-person events. Leaders use nearly 50% more content marketing tactics than laggards, particularly infographics (+47%), mobile apps (+30%), blogs (+28%), email marketing (+28%), and interactive tools (+24%).

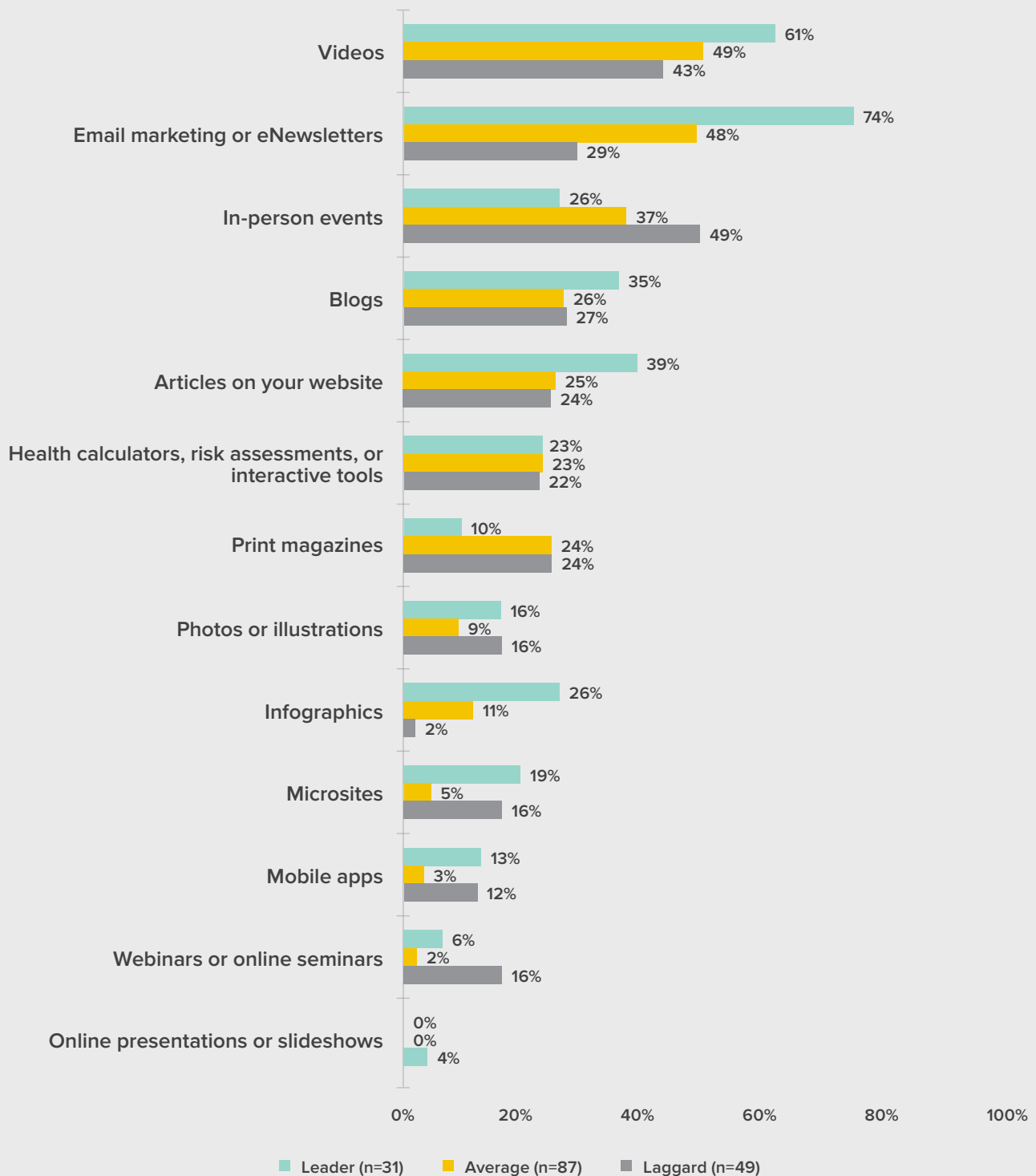
Which content marketing tactics do you use?



Content Marketing Effectiveness

Overall, digital content marketing tactics tend to be more effective than traditional. For both leaders and average organizations, videos and email marketing/eNewsletters are cited as the most effective. Laggards have the most success with in-person events.

Which content marketing tactics do you find most effective?



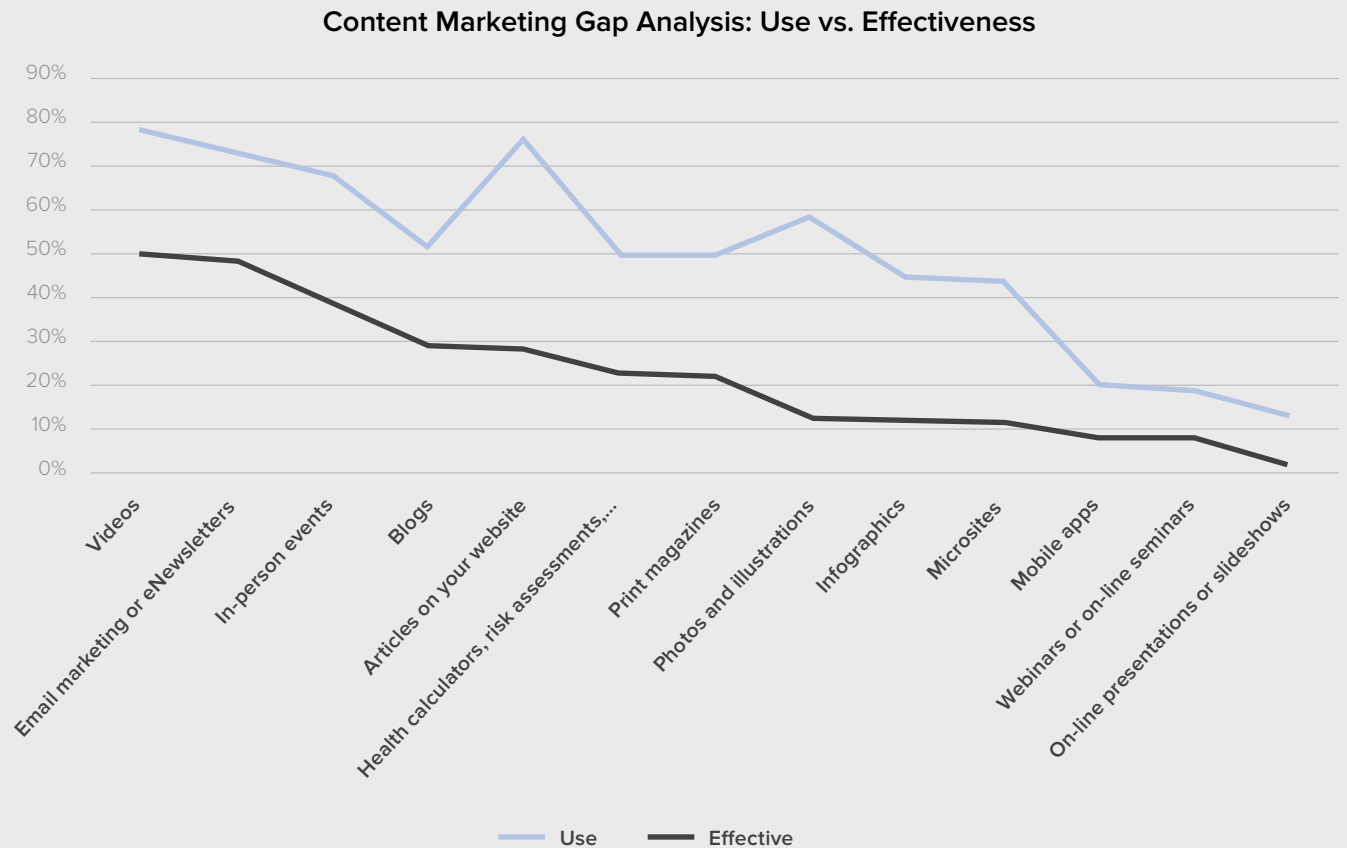


Leading healthcare marketers report that videos and email marketing are the most effective content marketing tactics.



Content Marketing ROI

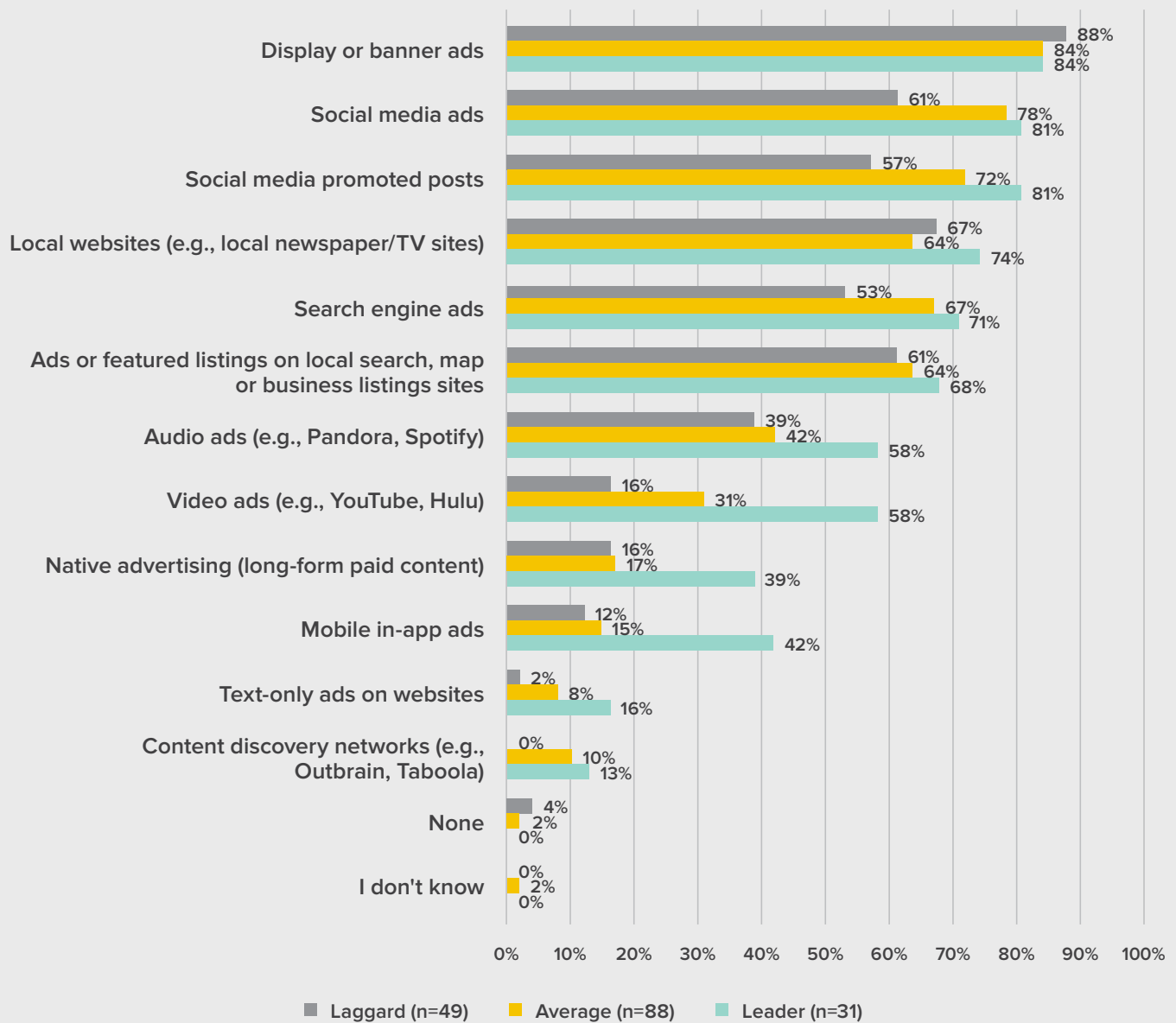
All of the content marketing techniques we polled are in use more often than they're thought to be effective. The use-effectiveness gap is particularly large for articles on website (+47%), photos and illustrations (+45%), microsities (+33%), infographics (+33%), and in-person events (+30%).



Digital Advertising

The most commonly used digital advertising tactics across all segments are display or banner ads, social media ads, and social media promoted posts. Leaders use more paid advertising tactics than laggards, particularly video ads (+42%), mobile in-app ads (+30%), and native advertising (+23%).

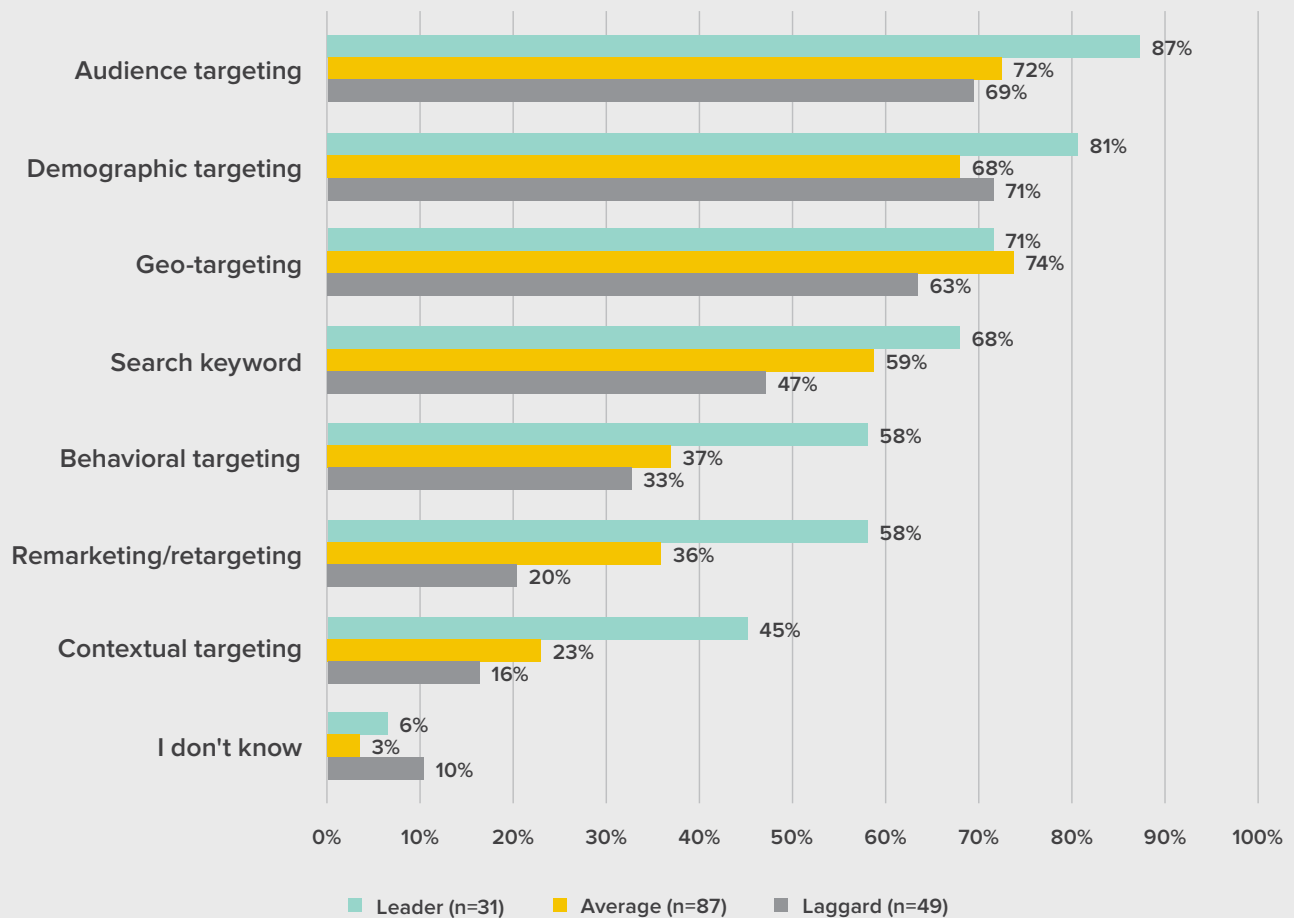
What types of paid digital advertising do you use?



Targeting

Targeting by audience, demographic and geography is seen commonly across all segments. Leaders use nearly 50% more targeting methods and are more likely to use remarketing (+38%), contextual targeting (+29%), behavioral targeting (+25%), and search keyword (+21%).

Which methods do you use for targeting digital advertising?





Marketing Technology

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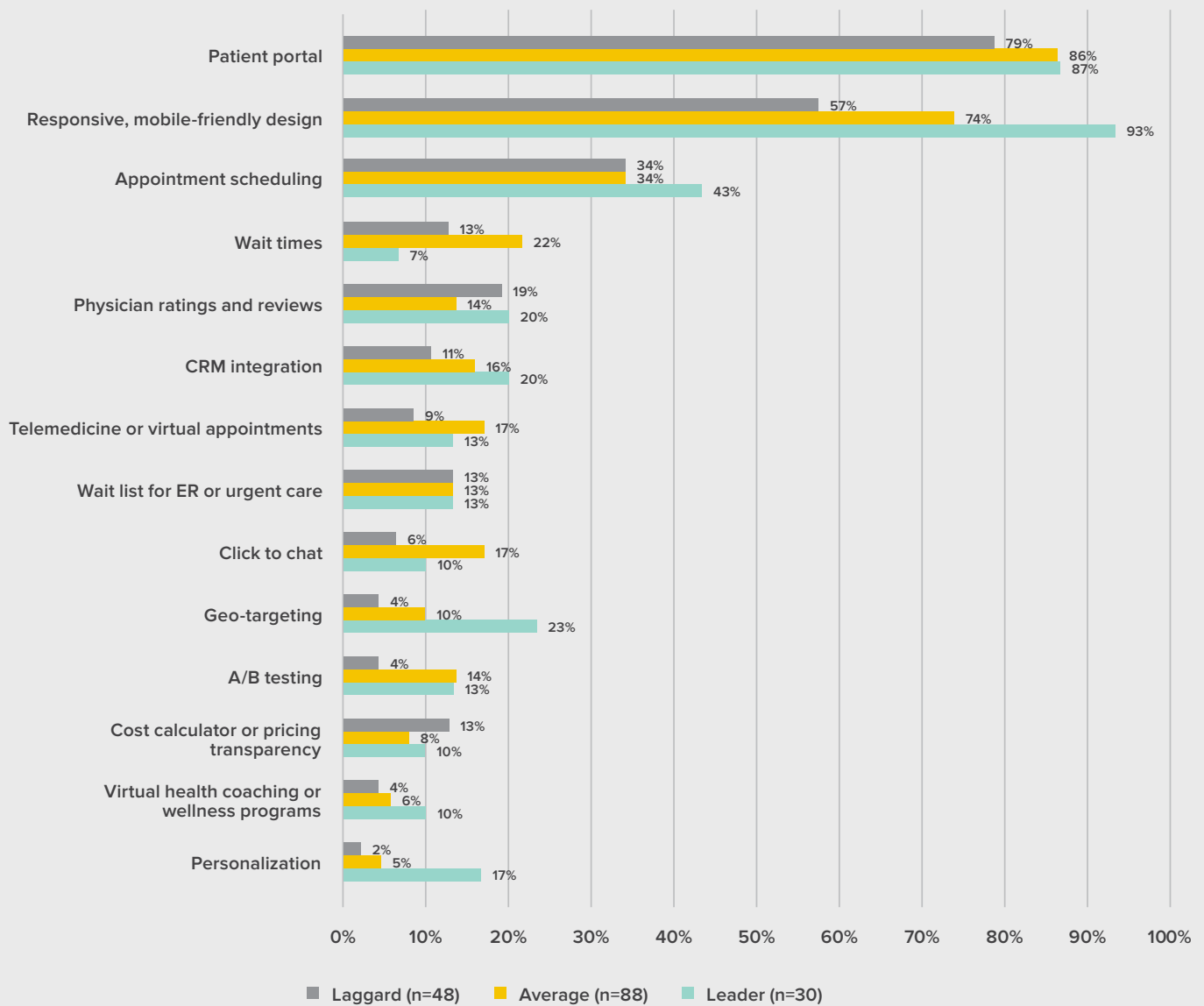
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Website Features

Today, most healthcare websites offer basic functionality. When looking at a more advanced set of high-profile features, it's clear patient portal and responsive design have the highest levels of adoption.

Leaders are significantly ahead in responsive design with 93% of leading organizations reporting adoption. Leaders are also ahead in emerging marketing technologies such as geo-targeting, A/B testing, and personalization.

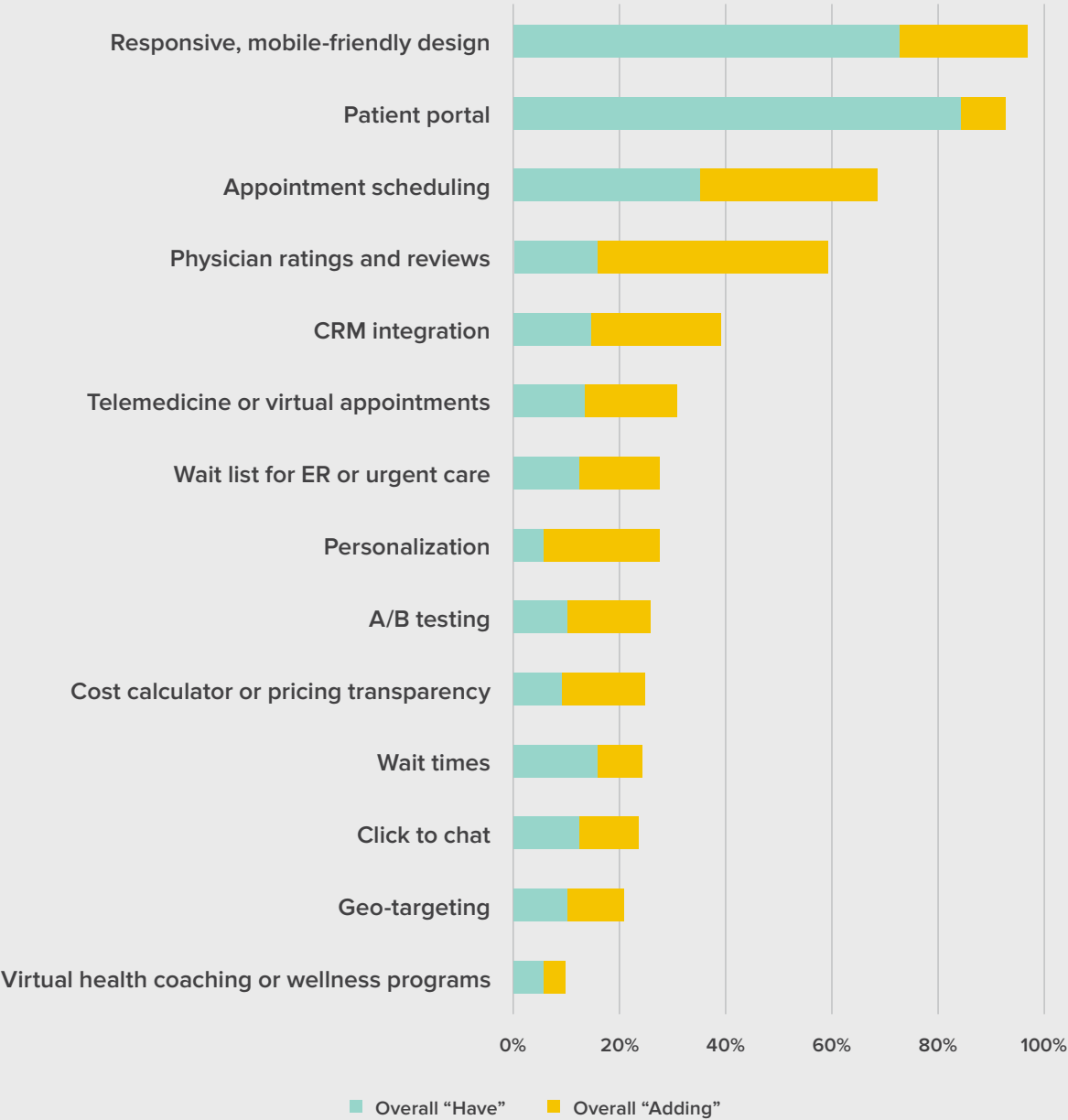
Which of the following advanced features does your website currently have?



Website Feature Investment Priorities

When looking at features in more detail, almost half of all respondents report that they are planning to add physician ratings and reviews in the next 12 months, followed by appointment scheduling, CRM integration, and responsive design.

**Adoption of Advanced Website Features
“Overall”**



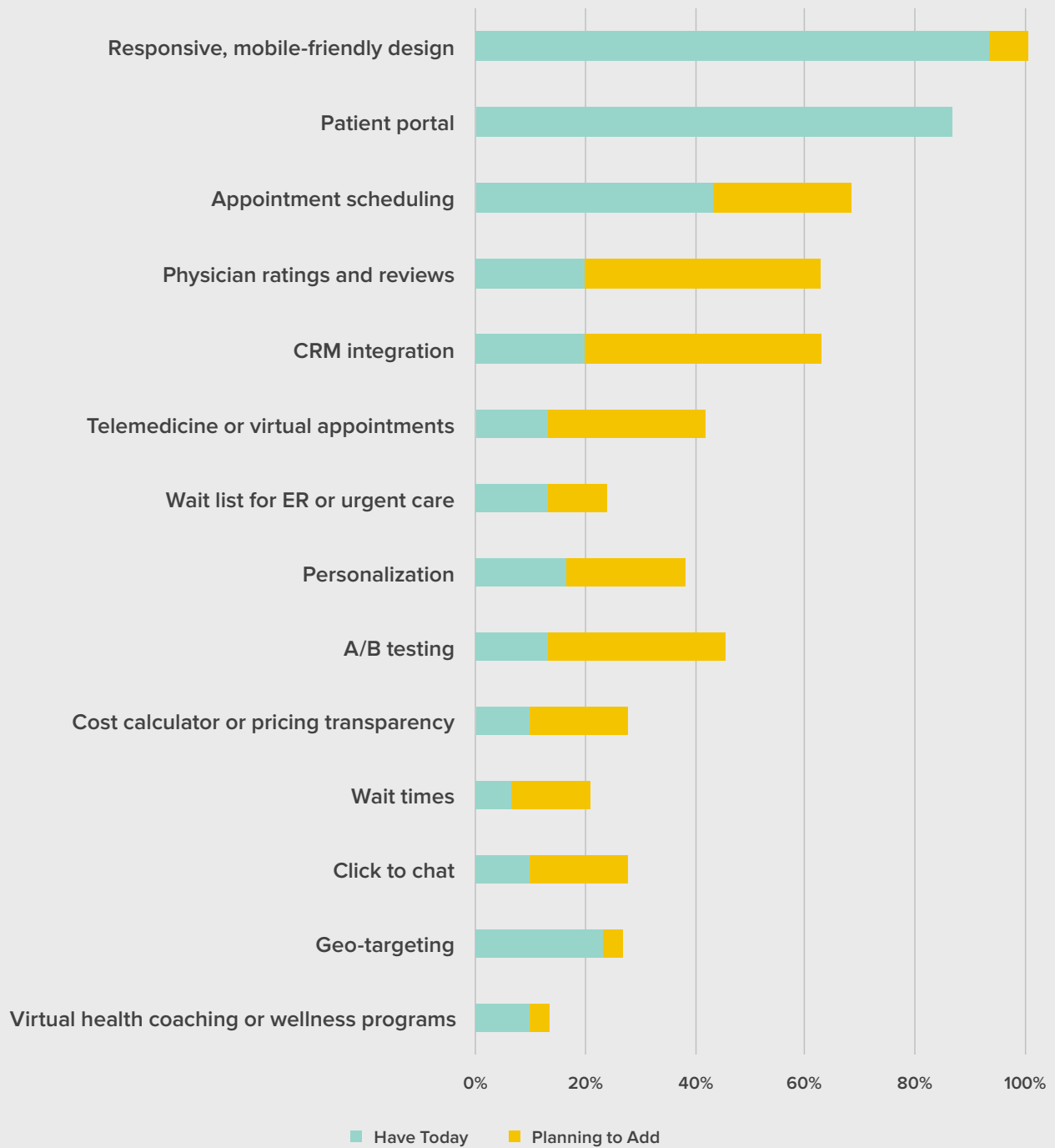
42% of all respondents plan to add physician ratings and reviews in the next 12 months.



A/B Testing

When it comes to which website features and functionality will be getting the most attention in the next 12 months, leaders alone will be making a big investment in website optimization through A/B testing and personalization.

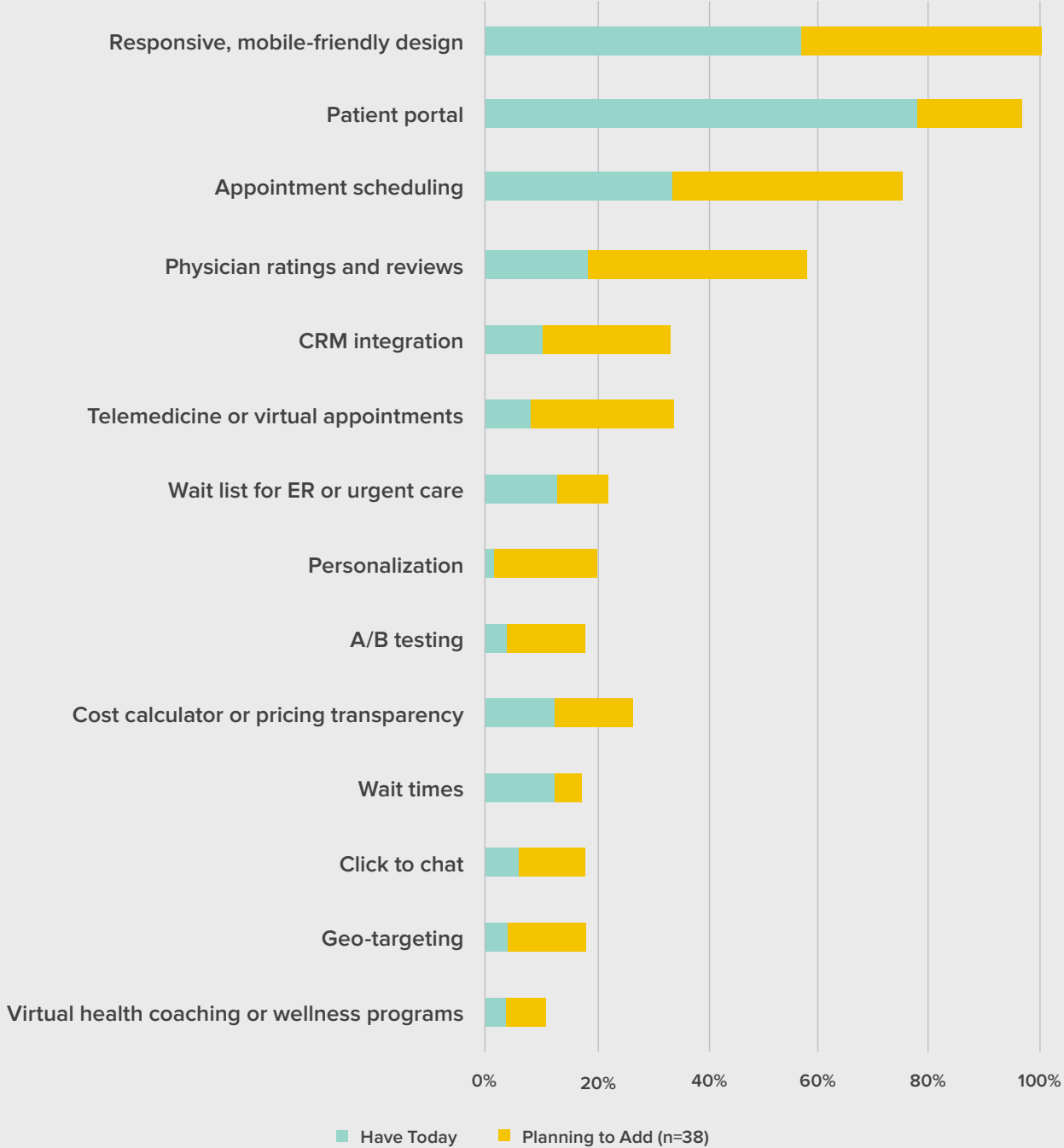
**Adoption of Advanced Website Features
“Leaders”**



Responsive Design

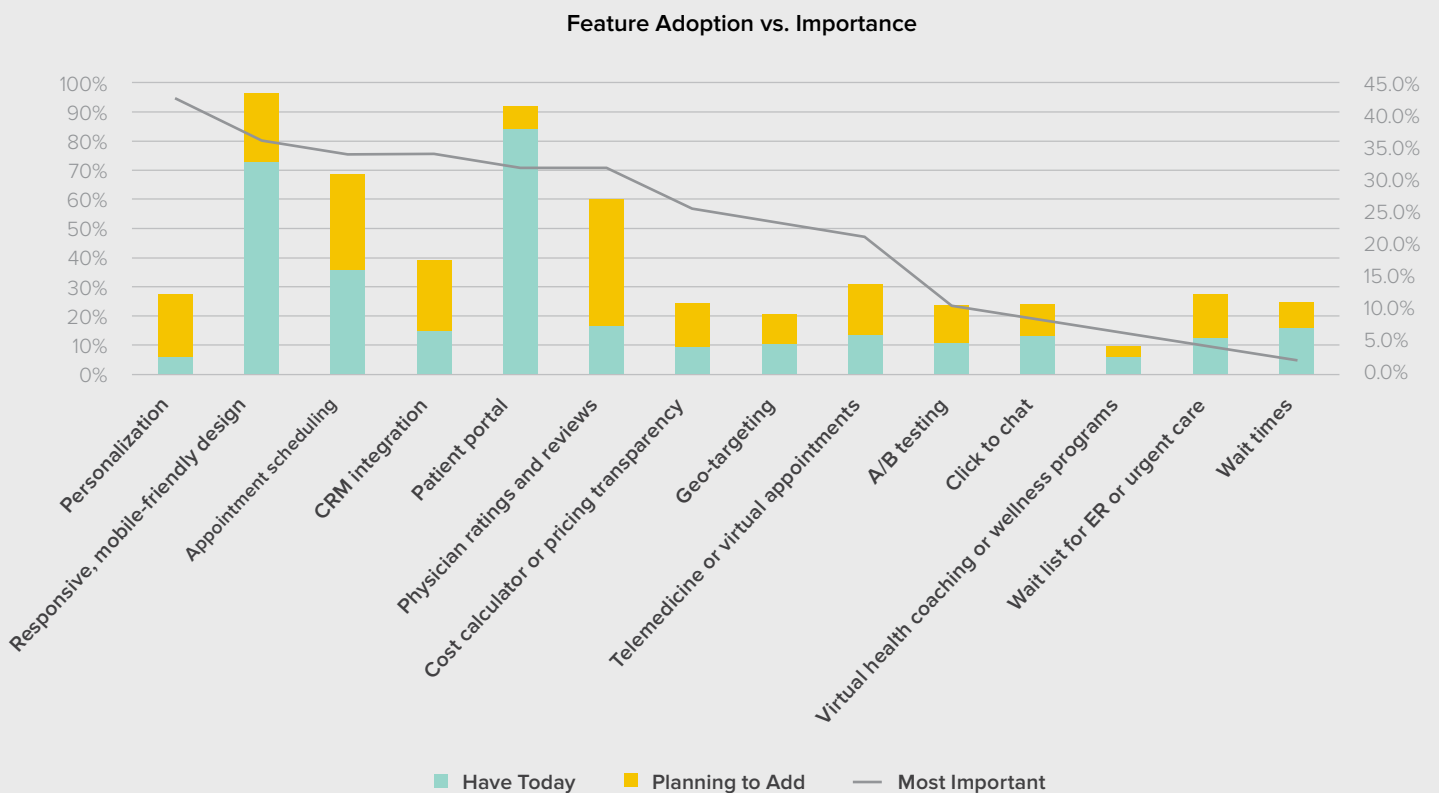
Laggards are looking to catch up on responsive design with 45% planning to add it in the next year, which essentially means that almost all organizations will have moved to responsive by the end of next year.

Use and Adoption of Advanced Website Features
“Laggards”



Agency Perspective: Feature Importance

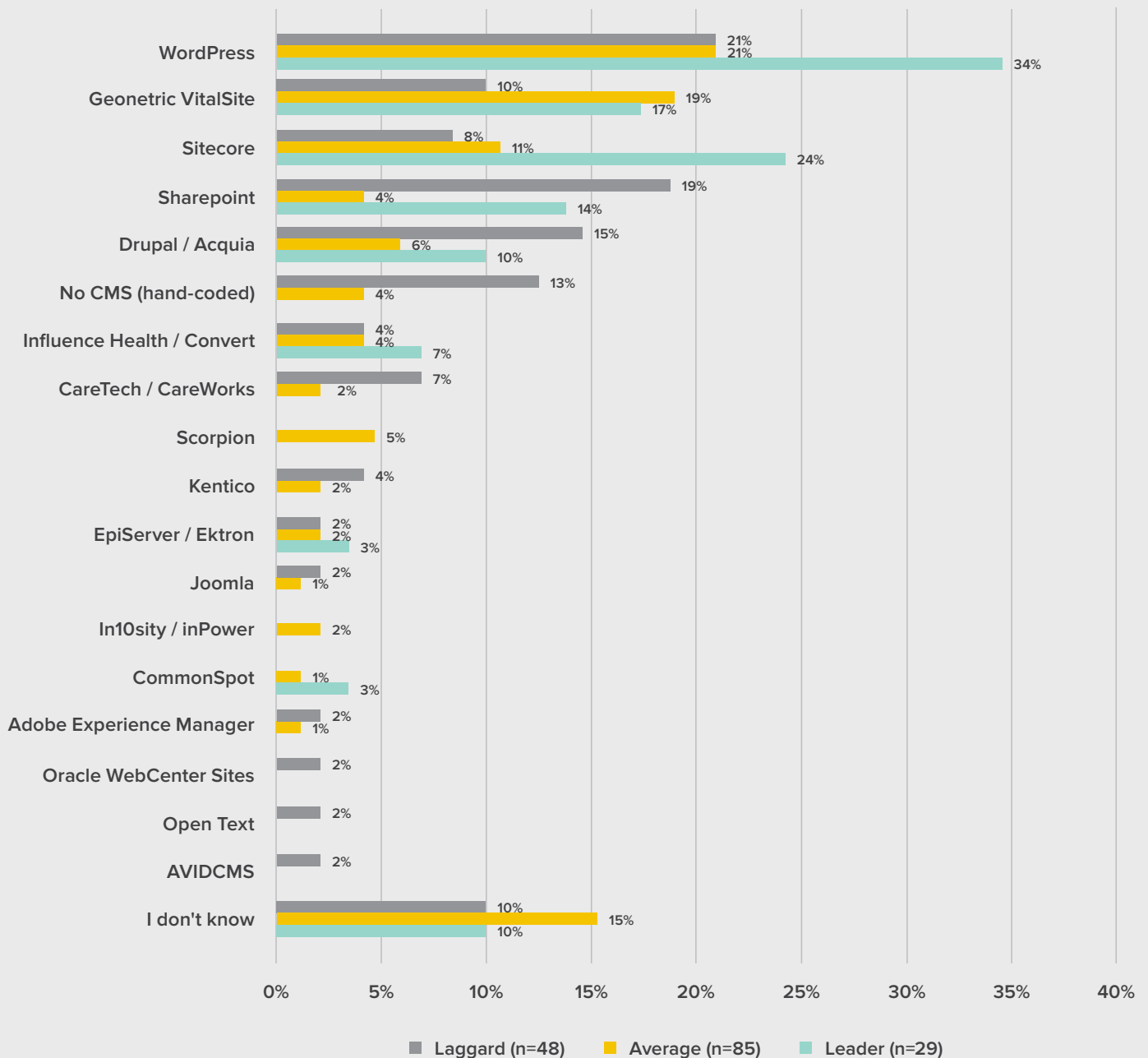
When comparing adoption by healthcare organizations to what agencies think are the most important features, it becomes clear that adoption for certain features, like personalization, lags behind perceived importance. Appointment scheduling and physician ratings and reviews are high-importance items that large numbers of health systems are adopting this year. Personalization, CRM integration, pricing transparency and geo-targeting are very high priorities for agencies, and there is a long way to go to close that gap between perceived importance and adoption.



Content Management Systems

WordPress is cited as the most used content management system (CMS), but it's important to note that only 37% of WordPress users have WordPress as their sole CMS solution. For example, one respondent listed five different CMS solutions.

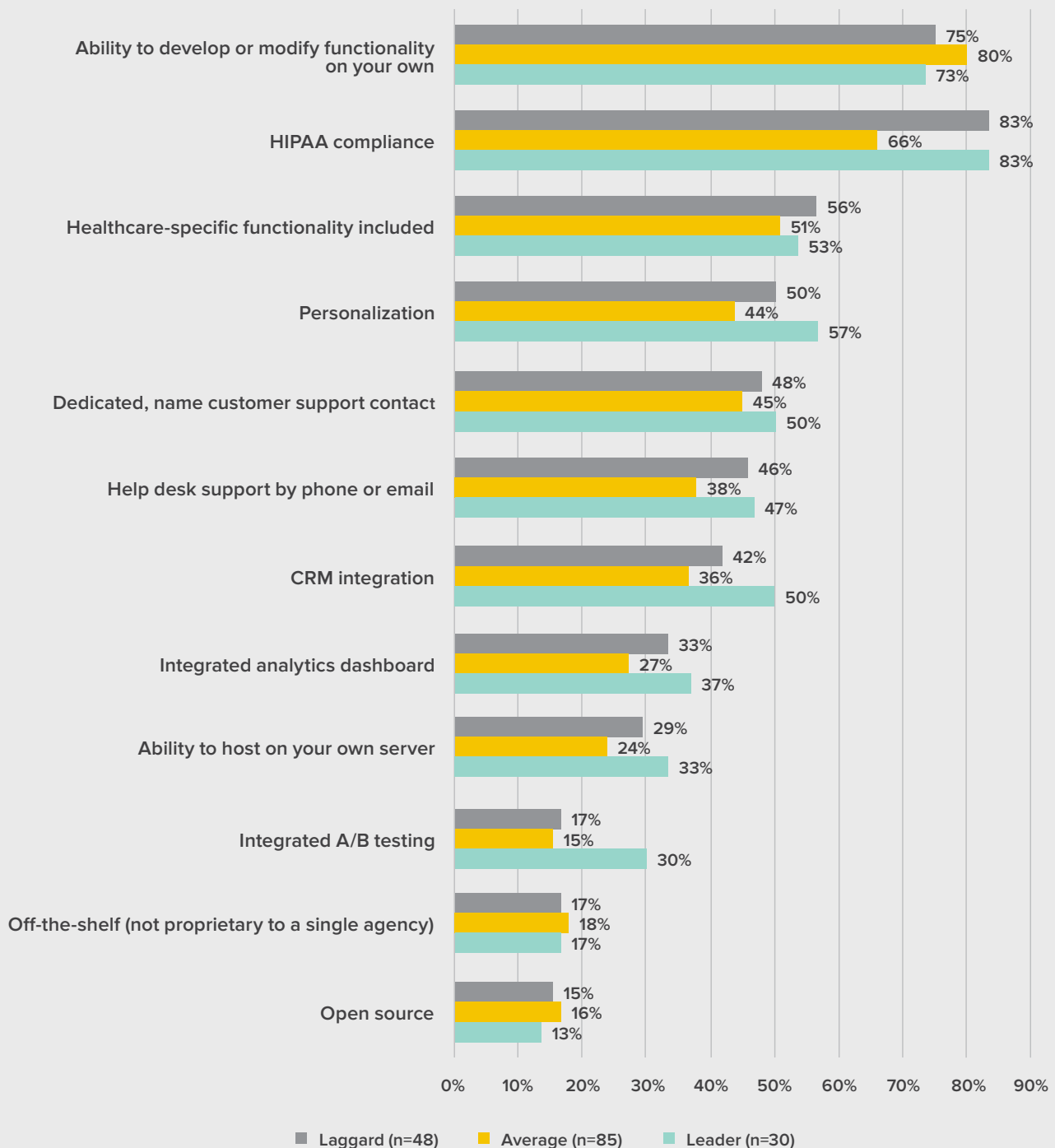
Which content management system(s) does your organization use?



CMS Features

When CMS shopping, the ability to develop or modify functionality and HIPAA compliance top the list of must-have features. On the other hand, less than 20% of respondents indicate that open source or off-the-shelf platforms are a prerequisite.

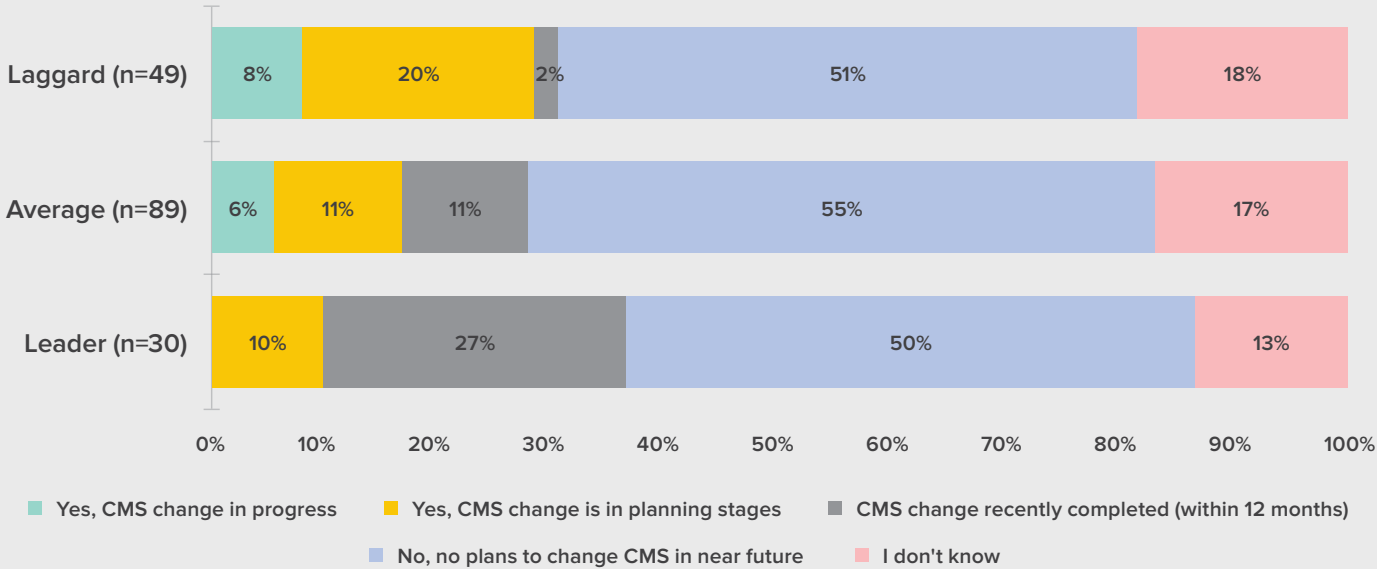
“Must-Have” Features of a CMS for Your Organization



Planned Changes in CMS Software

Overall, 19% are changing or planning to change their CMS and 27% of leaders have recently upgraded their platform.

Plans to Change the CMS(s) for Your Main Website



Planned Redesign

Half of all respondents have no plans to redesign or recently completed a redesign in the last 12 months. Of the 19% of respondents that are planning or are in the process of changing their CMS, most of those CMS changes are happening in tandem with a redesign. Twenty-seven percent of respondents are planning a redesign or are in the process of a redesign without plans to change CMS platforms.

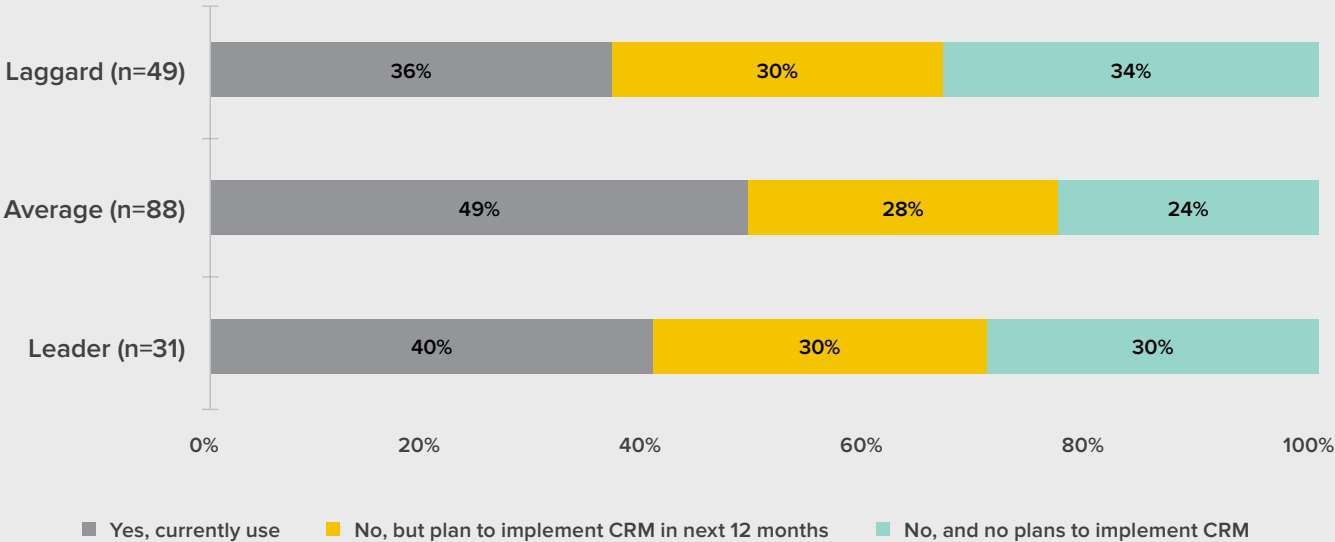
Do you plan to redesign your main website(s)?

	No, no plans to change CMS in near future	No, CMS change recently completed (within 12 months)	Yes, CMS change in progress	Yes, CMS change in planning stages	Grand Total
No, no plans to redesign in near future	29%	1%	0%	0%	30%
No, redesign recently completed (within 12 months)	8%	11%	0%	1%	20%
Yes, redesign in progress	17%	1%	6%	1%	24%
Yes, redesign in planning stages	10%	1%	1%	14%	25%
Grand Total	64%	14%	7%	16%	100%

CRM Adoption

Average organizations are ahead of laggards when it comes to CRM software adoption. Average organizations have more CRMs in use today, but when you factor in aggressive implementation plans for the next 12 months this gap tightens somewhat.

Does your organization use CRM software?
(Excluding "I don't know" answers)





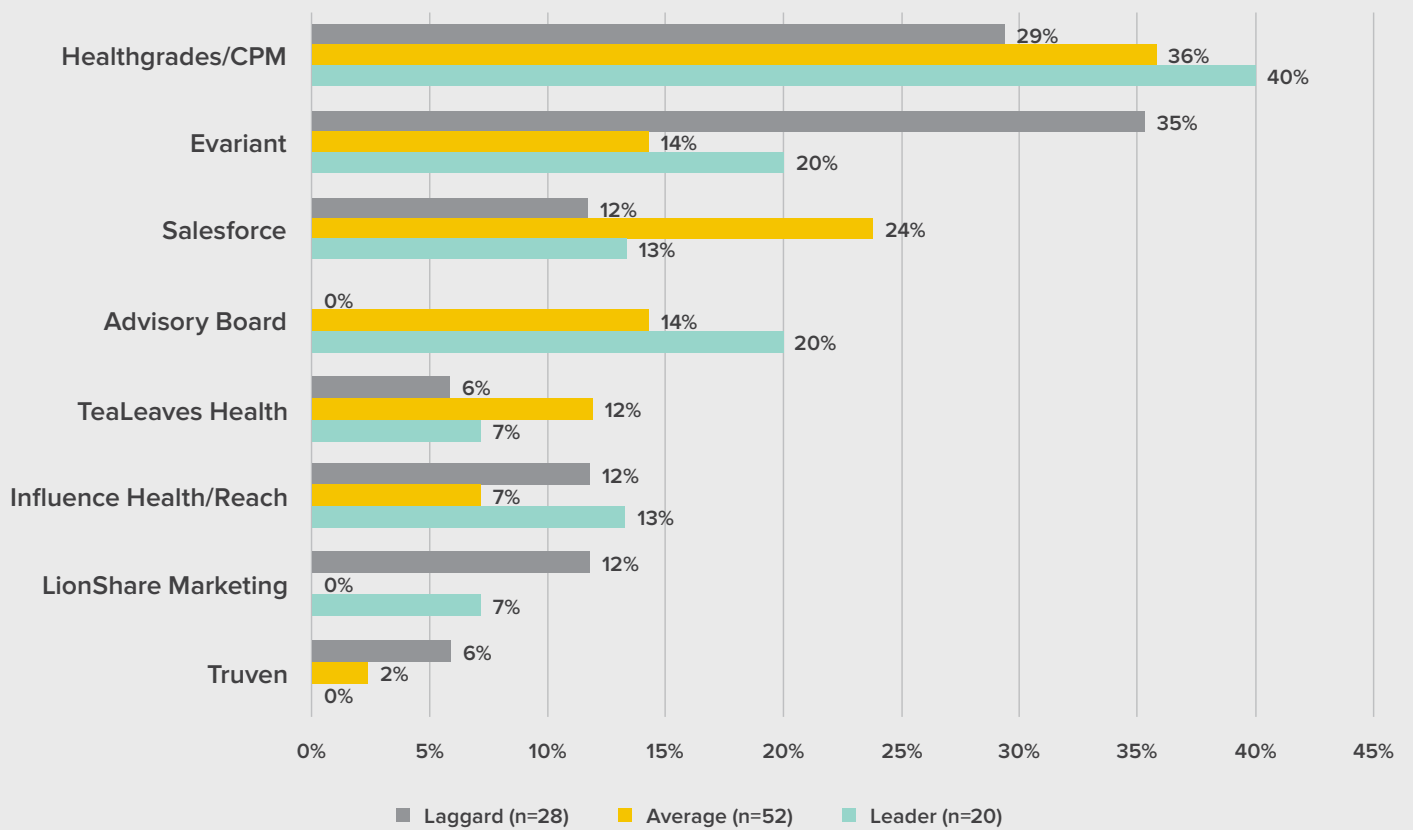
Average organizations
are ahead of leaders
when it comes to
CRM adoption.



CRM Software

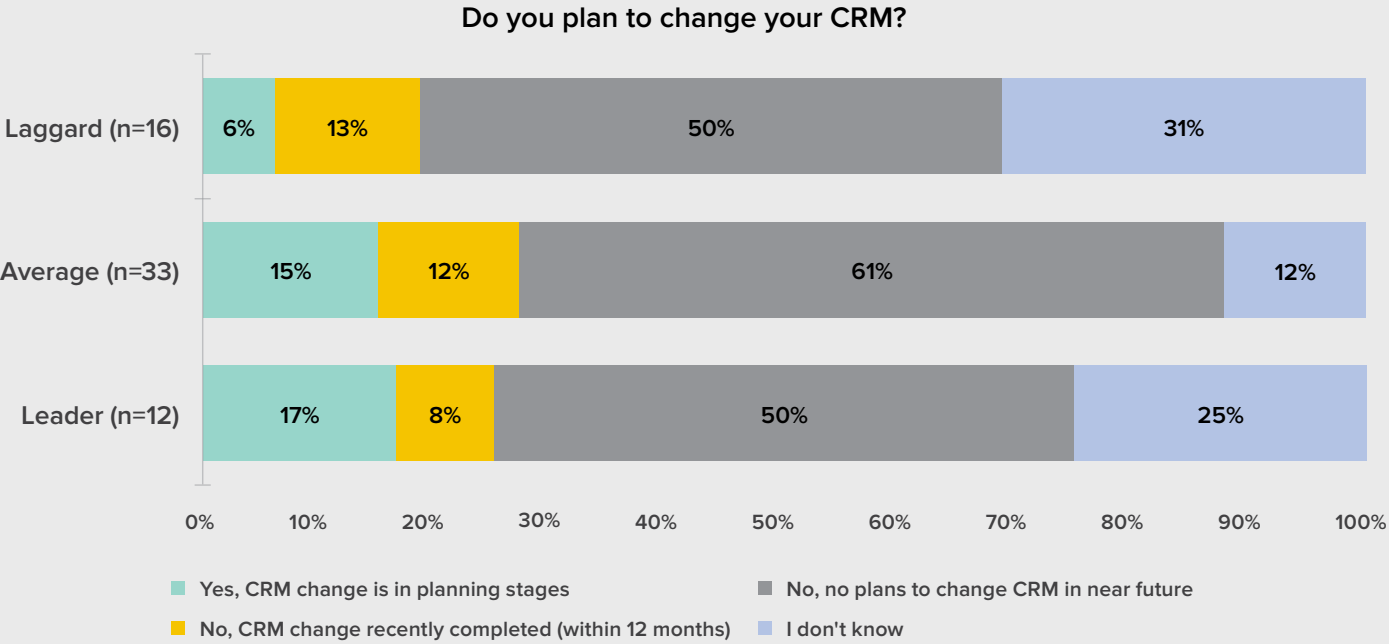
Healthgrades/CPM is the most popular software amongst leaders and average organizations. Relatively new entrant in the space, Advisory Board, has seen significant growth, particularly amongst leaders where they hold a 20% market share.

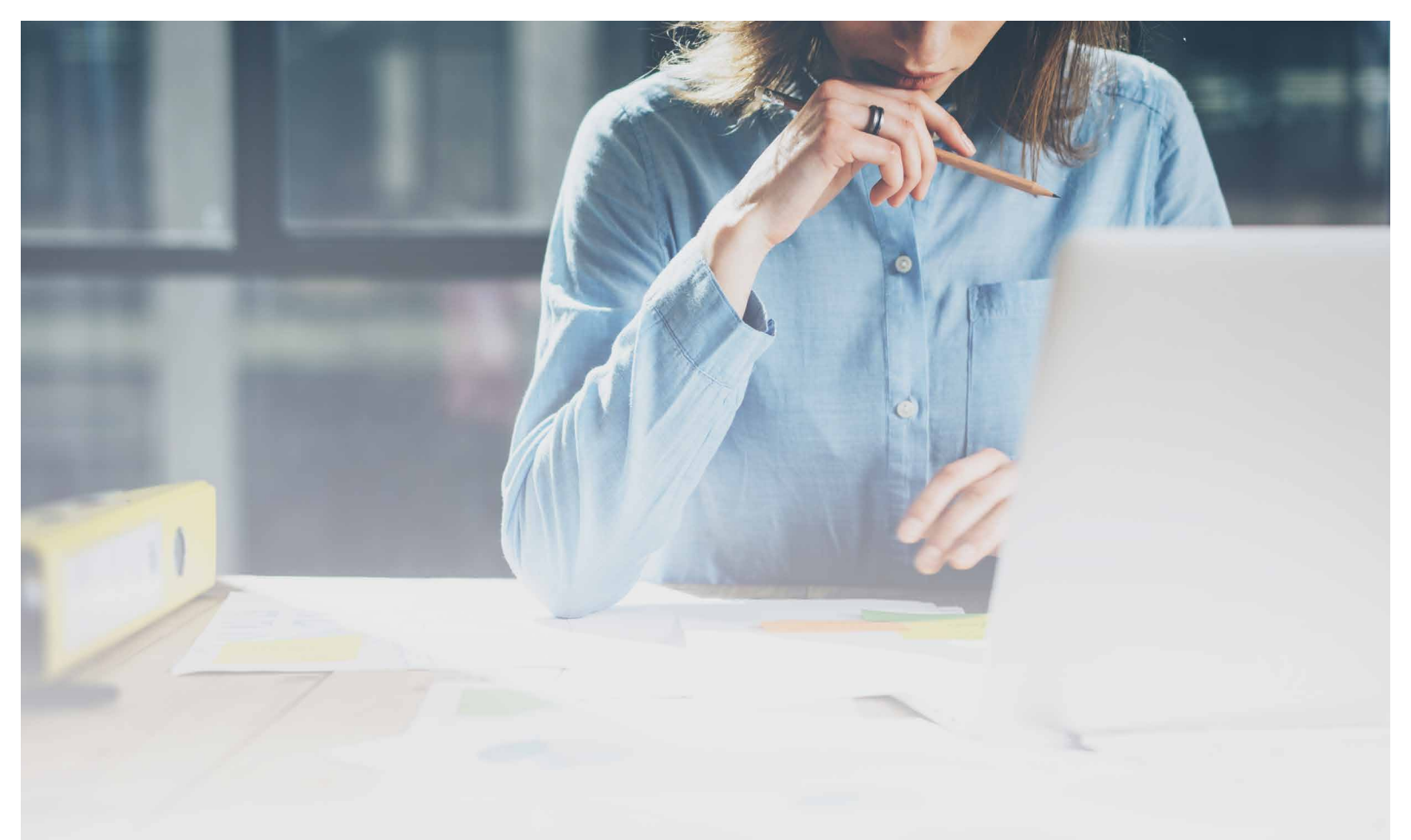
What CRM tool(s) does your organization use or plan to use?



Planned Changes in CRM Software

The majority of organizations do not plan to change their CRM in the near future.





Closing

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Survey Methodology

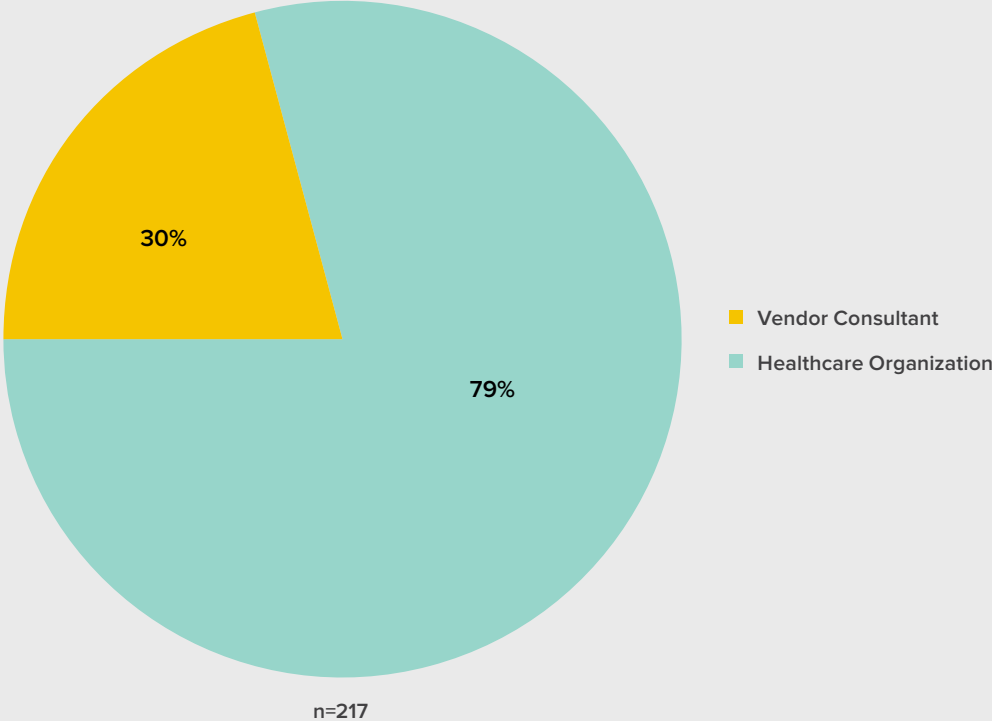
Data collection was handled through an online survey. Respondents were solicited through a wide range of channels including email, social media, and phone. Geometric partnered with *eHealthcare Strategy & Trends* for additional promotion efforts.

All survey questions were optional and some respondents chose not to answer individual questions. Peer groups for segmentation were largely self-reported. Some responses were re-categorized based on organization data provided. Some questions required coding prior to analysis, which was performed by research firm **Vernon Research Group**.

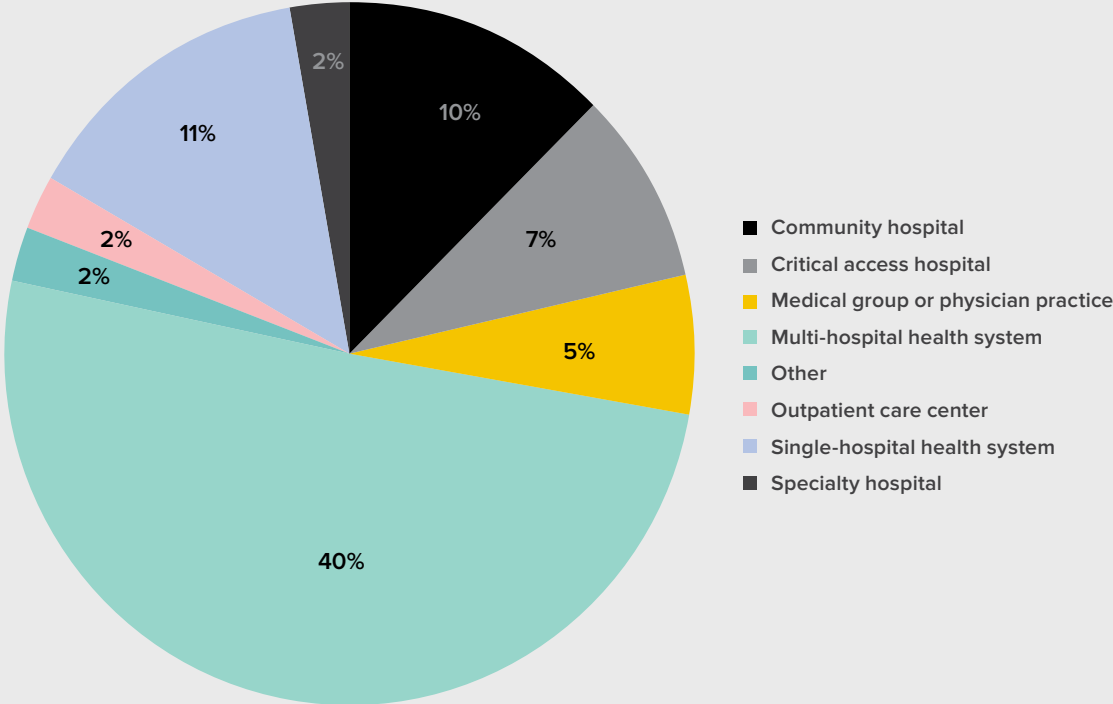
Data is provided as-is and represents only the input and opinions of those organizations who responded. It is offered without any promises to its representation of the broader industry or statistical significance.

Respondent Demographics

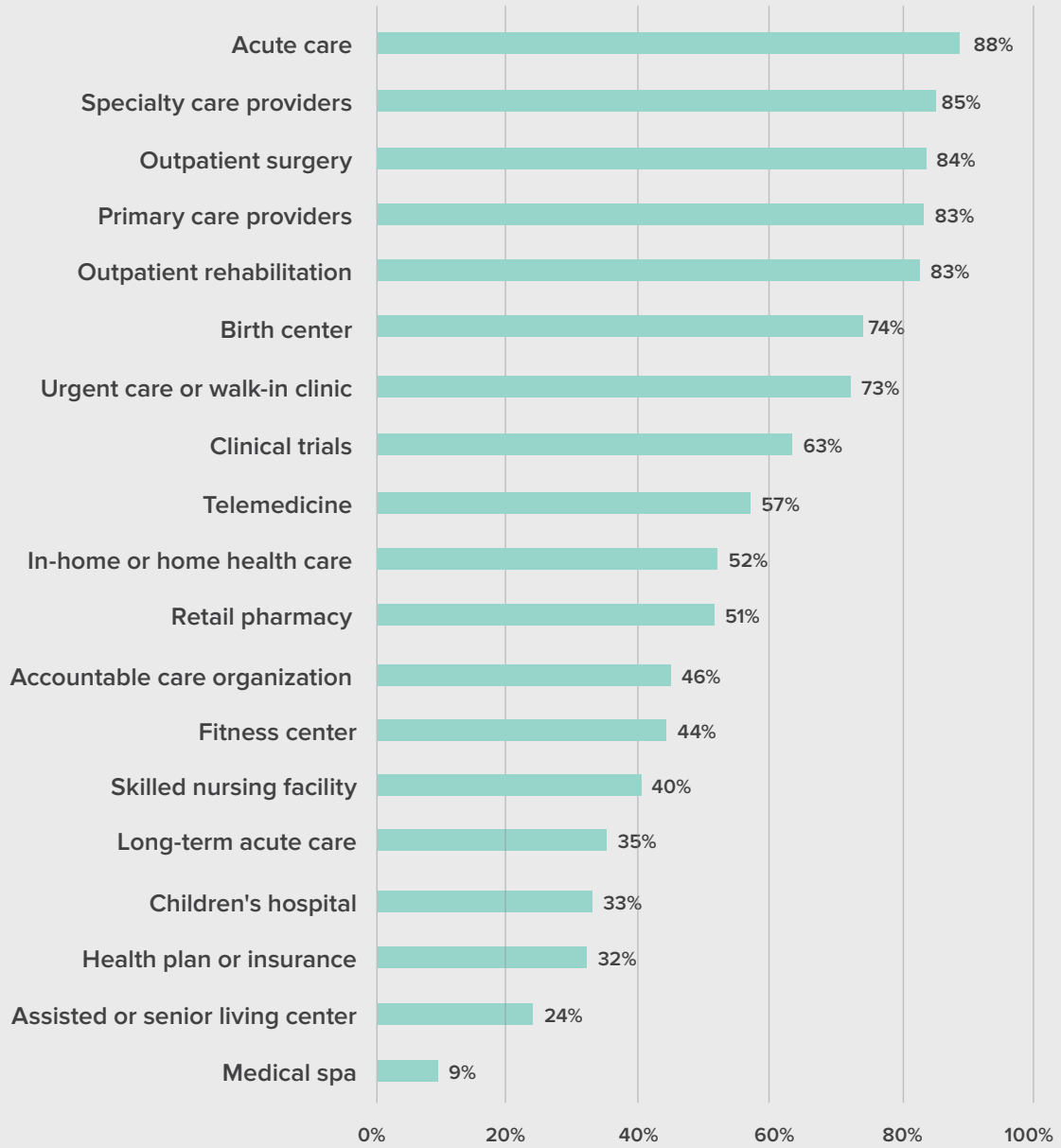
What best describes your organization? (All Responses)



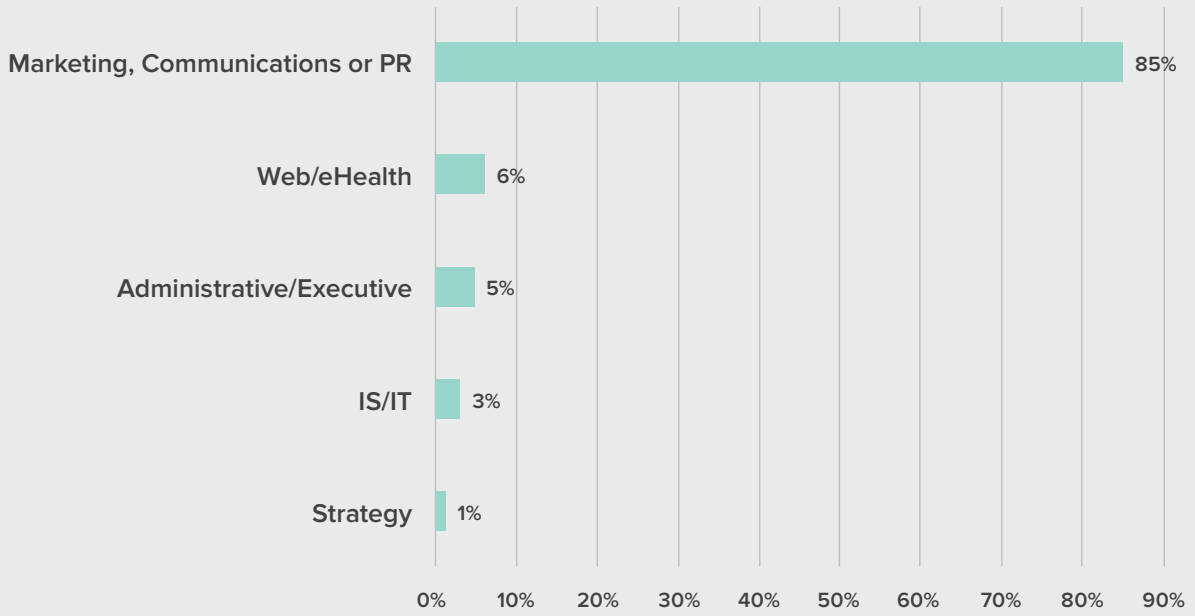
What best describes your organization? (Healthcare Organizations)



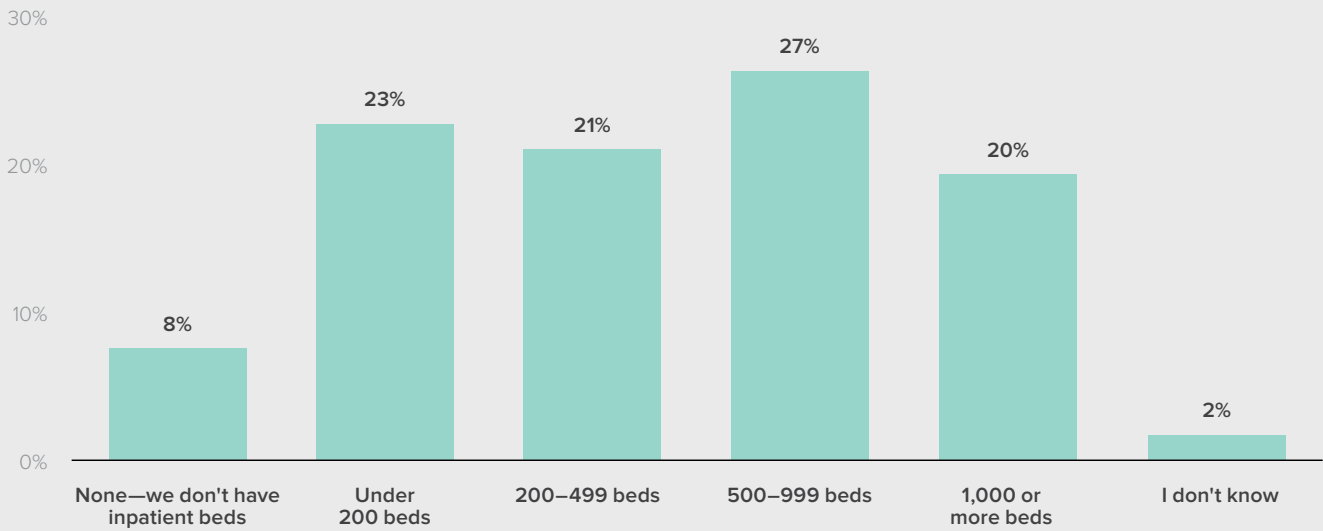
Services offered by Respondent Organization



Respondent Department



Organization Size by Number of Beds



About the Author



Ben Dillon, MBA

Chief Strategy Officer

ben.dillon@geometric.com

Ben's a big picture type of guy. He loves sharing new ideas in digital marketing, keeping a watchful eye on healthcare industry trends, and seeing how it all intersects. A sought-after speaker, writer, blogger and the current president-elect for SHSMD, Ben's an influential voice in healthcare marketing, helping organizations across the country embrace online strategies to engage health consumers. Ben holds a master's degree in eBusiness and strategic management from the University of Iowa and a bachelor's degree in computer engineering from the University of Michigan. When he's not traveling and evangelizing, Ben enjoys cooking with his family and playing the Big House with the University of Michigan Alumni marching band.

Contributors



David Sturtz

Digital Strategy Director

david.sturtz@geometric.com



Heather Stanley

Sr. Marketing Comm. Strategist

heather.stanley@geometric.com



Michael O'Neill

Technical Comm. Strategist

michael.oneill@geometric.com



Nate Collins

Designer

nate.collins@geometric.com

About Geonetric

Geonetric helps healthcare brands thrive through effective marketing and distinctive websites. As a marketing agency and software developer with deep technical and creative expertise, Geonetric provides hospitals, health systems, and medical groups with web development, web design, hosting, marketing strategies, and creative services optimized for the unique needs of the healthcare industry.

Contact Us

If you'd like to continue this discussion and dig deep into what this data means for your organization, let's talk!

www.geonetric.com
855.848.7407
hello@geonetric.com





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