

Personalization Strategy for Healthcare

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Personalization

Personalization is a process that draws on the attributes and actions of individuals or groups of users to increase the relevance of a digital experience.

Personalization is an opportunity to:

- ✓ Prioritize the choices offered to users
- ✓ Create an experience that is highly relevant and convenient
- ✓ Systematically improve results from digital efforts



Agenda: What we'll cover today

1

Why personalization is a critical part of your marketing mix, working to boost the results of all of your other marketing efforts – from advertising to search to CRM campaigns.

2

The two strategic bookends that frame a successful personalization project.

3

How to identify and prioritize the most effective tactics for your organization.

4

An overview of the landscape of personalization technologies and considerations for selecting and implementing a solution.



— REFLECTION —

How are you feeling about your
own personalization journey?



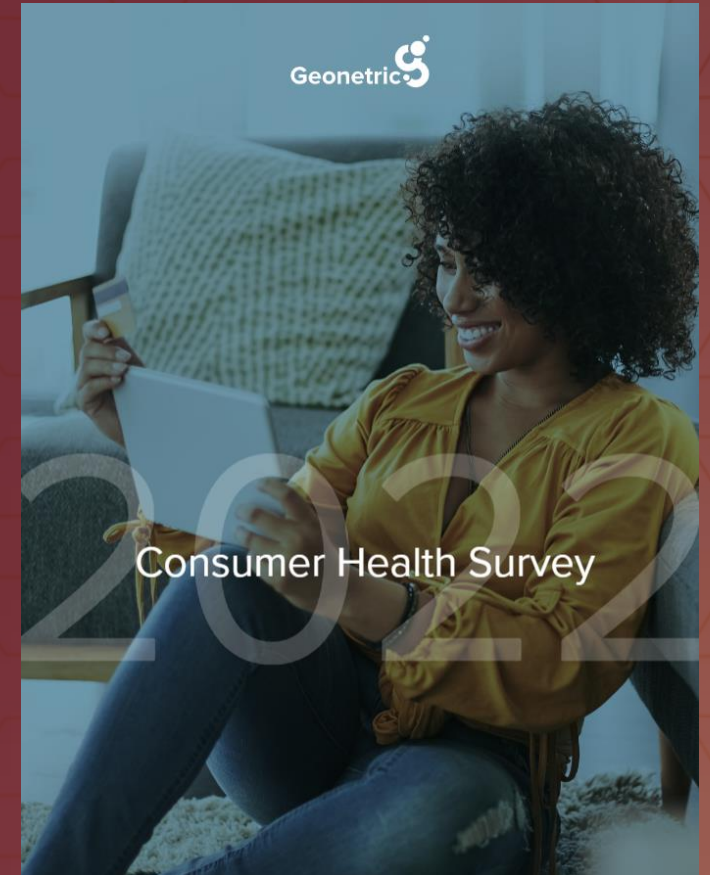
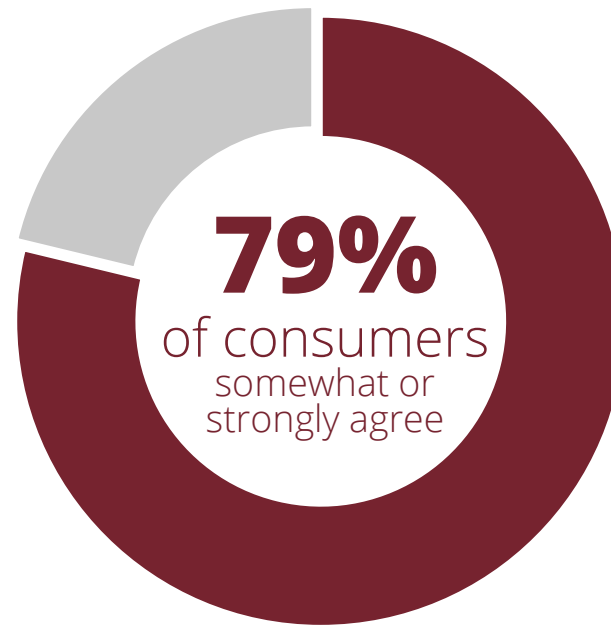
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Why personalization?



Personalization aligns with consumer expectations.

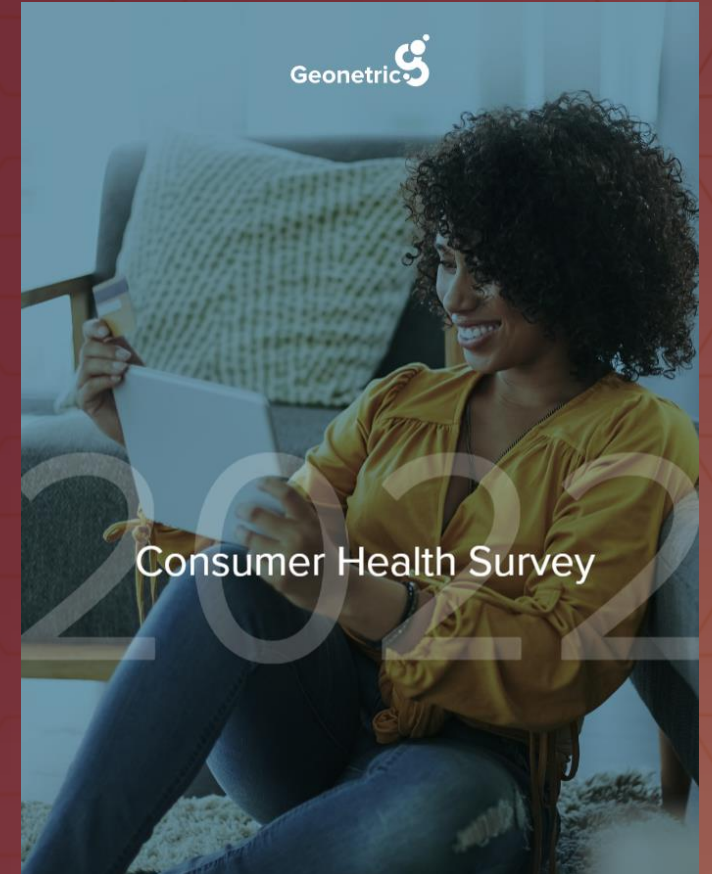
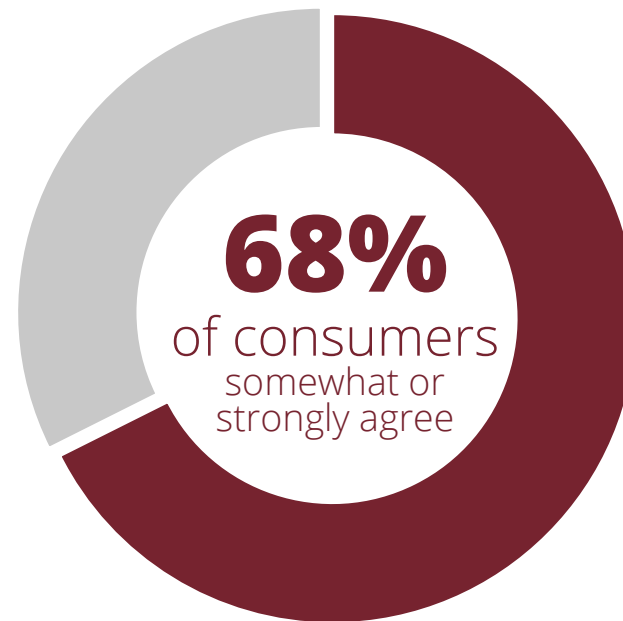
"I expect healthcare websites to personalize my experience by understanding my preferences and needs as an individual to deliver more relevant information and services."



geonetric.com/2022-consumer-survey

Personalization creates a better consumer experience by improving relevancy

“It is **frustrating** when healthcare websites show or recommend information or actions that aren’t **relevant** to me.”

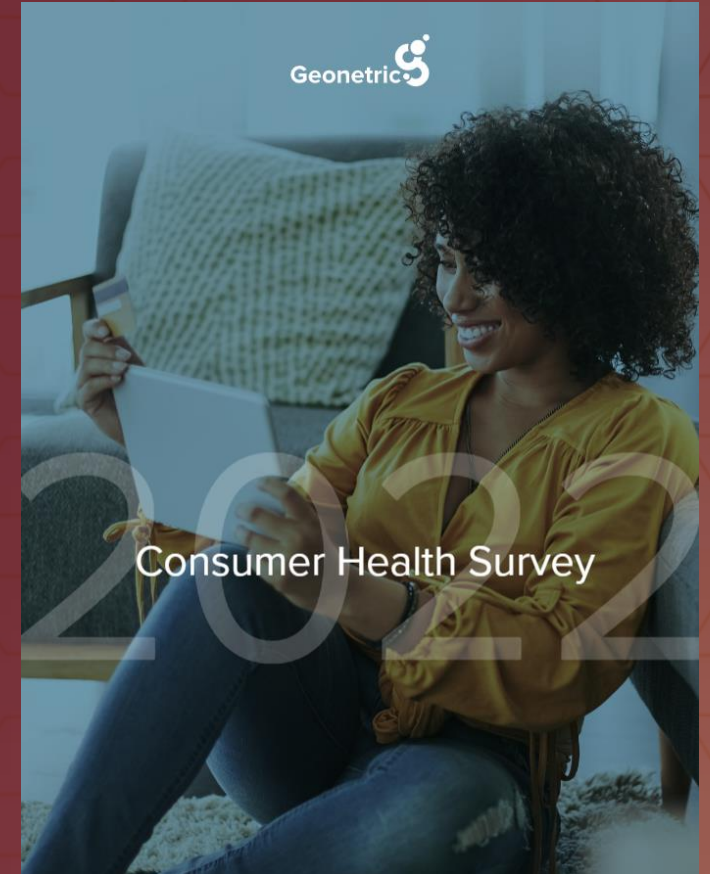
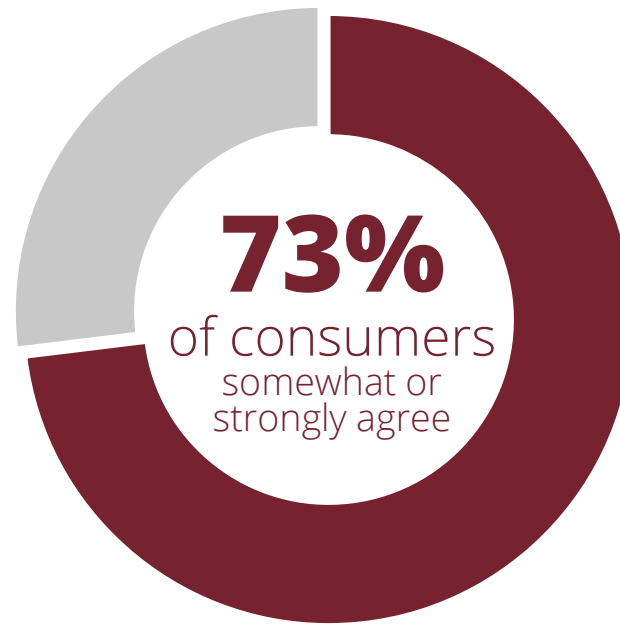


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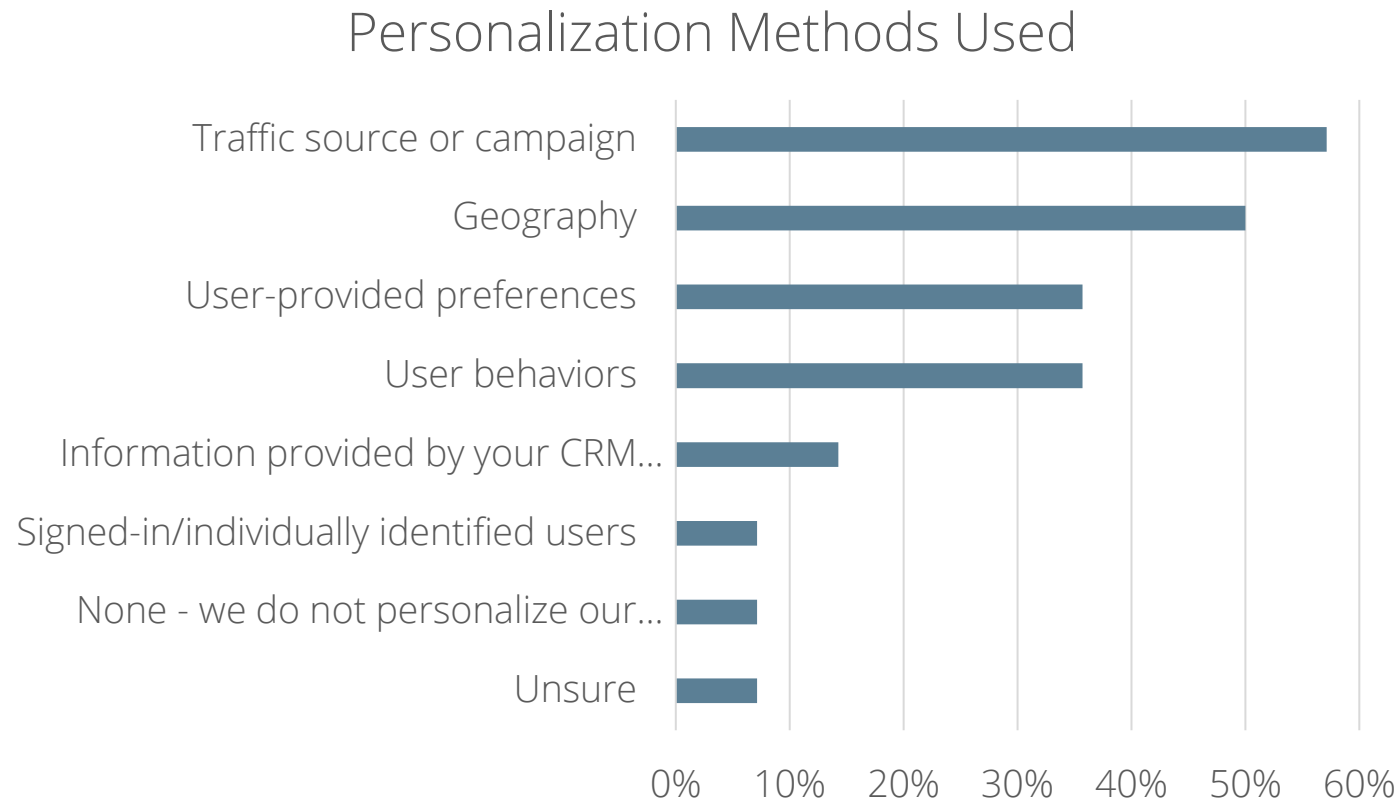
Most consumers trust the privacy practices of healthcare websites.

“I **trust** healthcare websites to protect the **privacy** of my information.”



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A variety of personalization methods are being used by healthcare marketers.



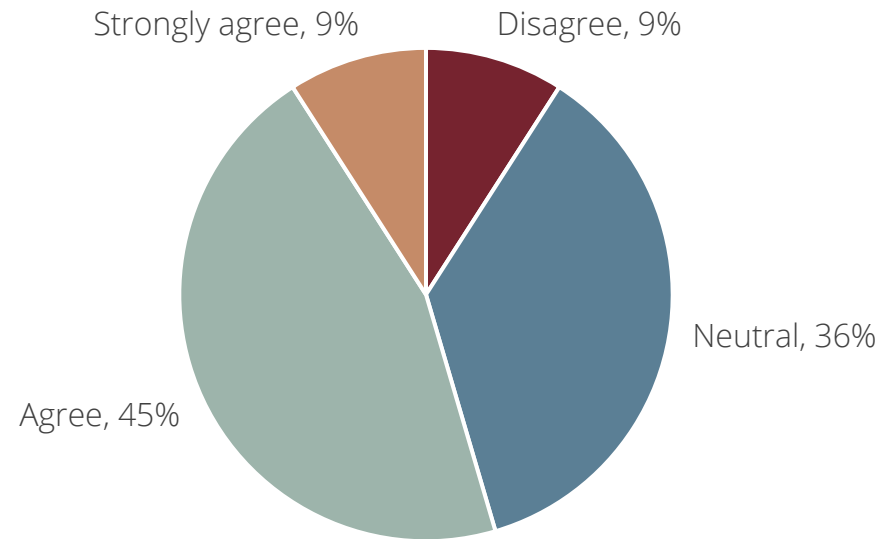
geometric.com/21-trends



Healthcare marketers are increasingly able to demonstrate the value of personalization.

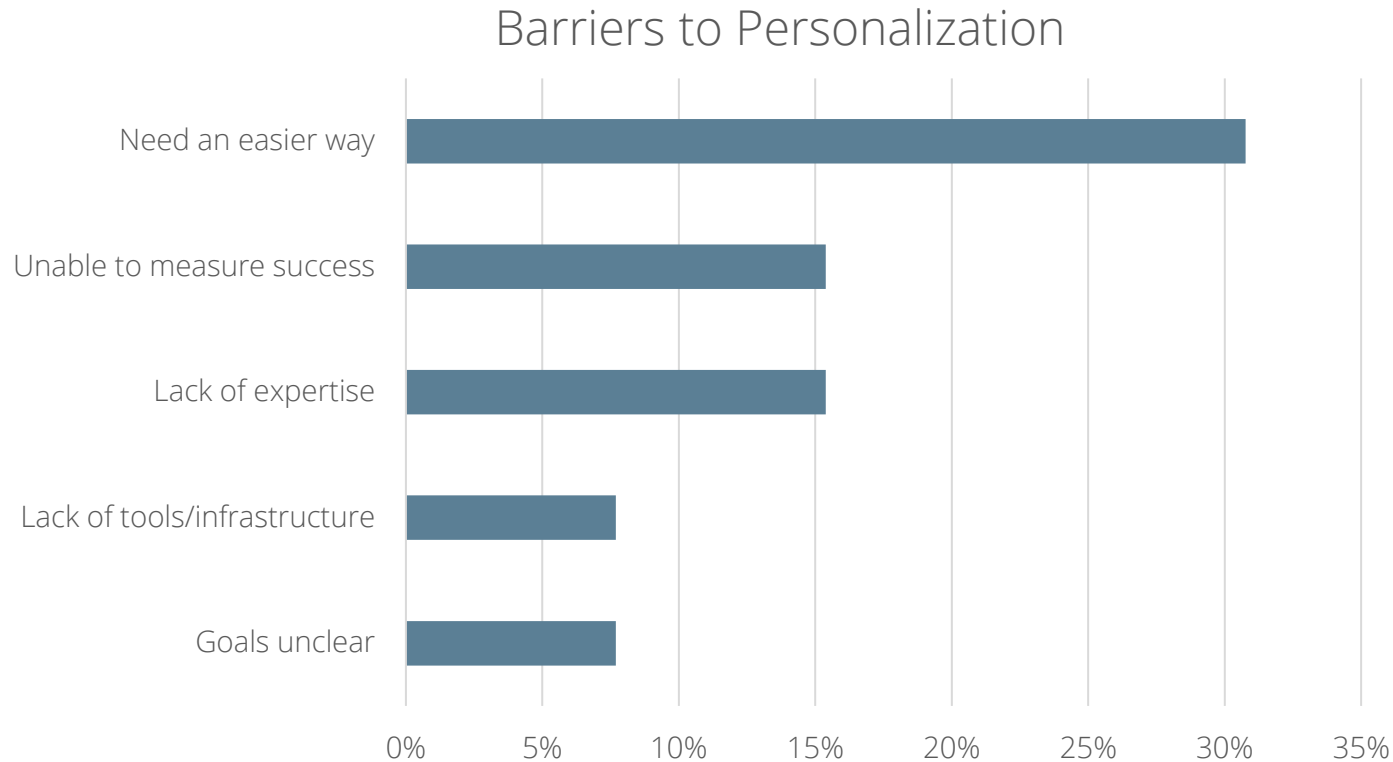


Our organization can demonstrate that website personalization has improved the performance of our digital marketing



geometric.com/21-trends

Healthcare marketers report the biggest barrier to personalization is the overall difficulty.



geometric.com/21-trends



— REFLECTION —

Why is personalization important
for your organization?



2

Establishing the bookends of your
personalization strategy



How do you know if
personalization is the next step?

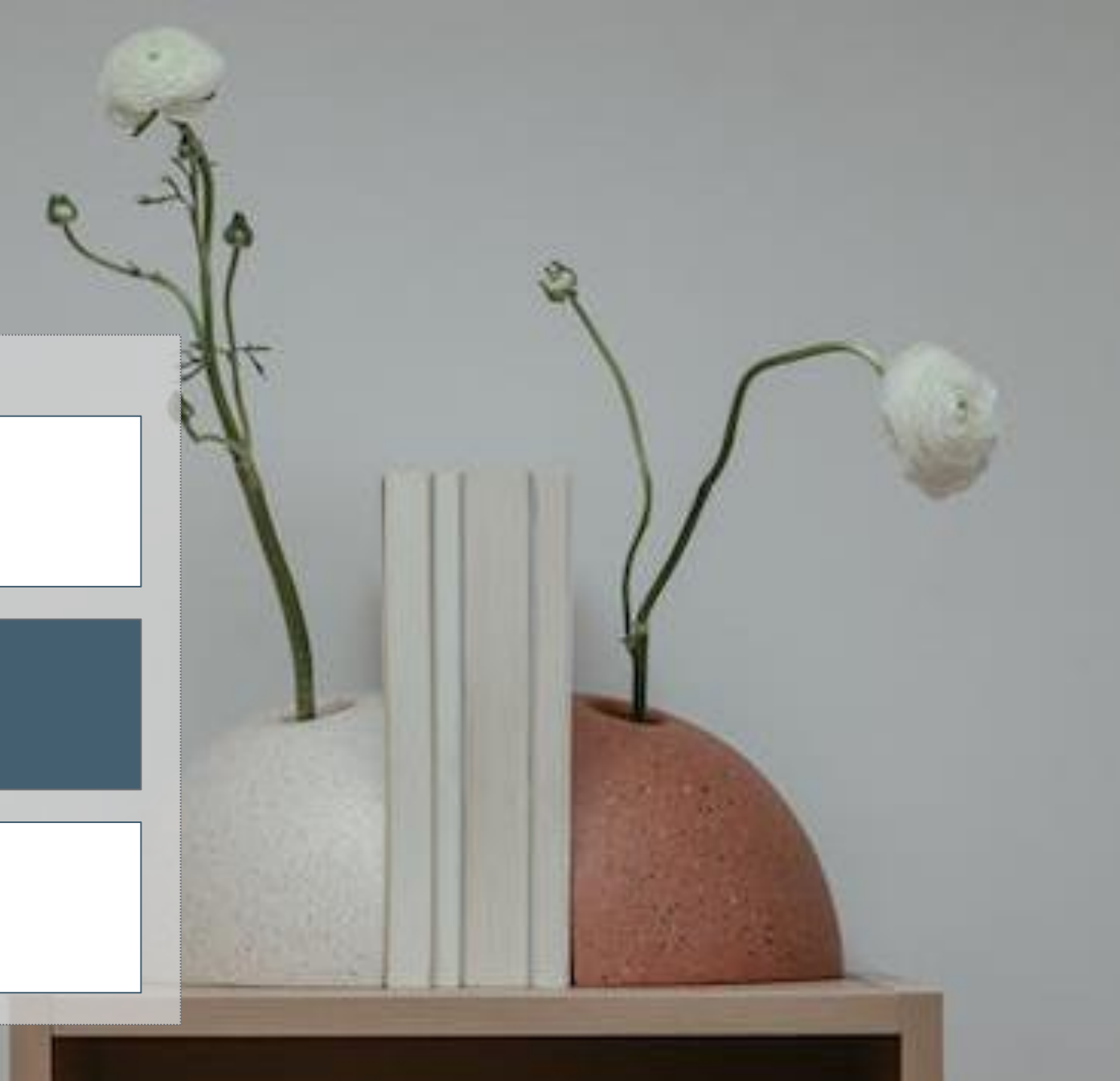
The layers of creating personalized experiences

Analytics

Audience

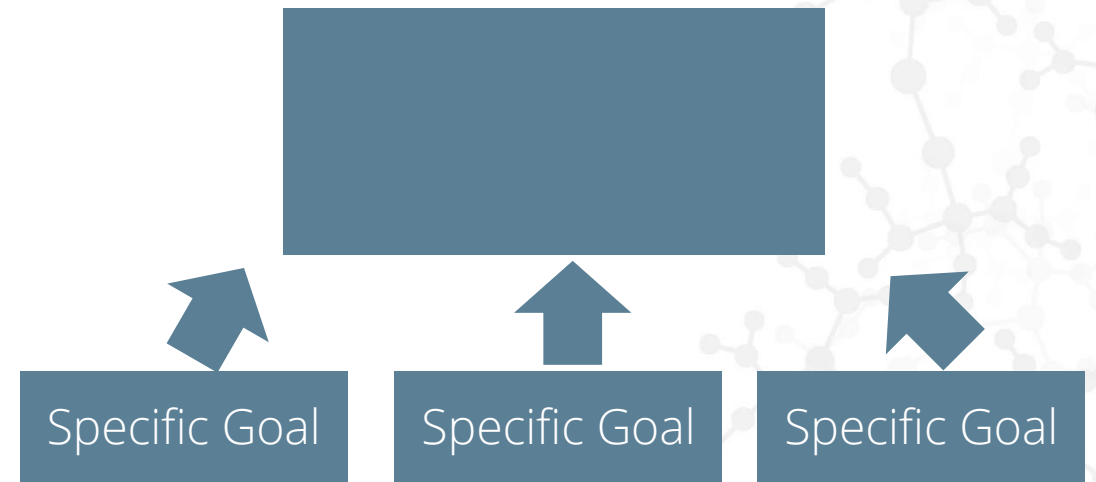
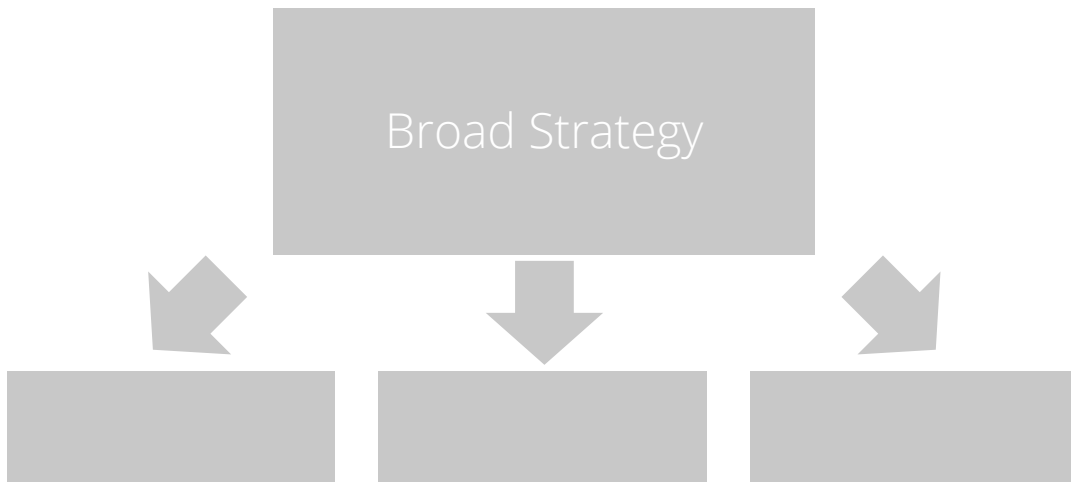
Experience

Conversion



Top-down vs. bottom-up approaches to personalization strategy

Top-down prioritization of strategies drives implementation of tactics.



Bottom-up prioritization of outcomes drives implementation of tactics.





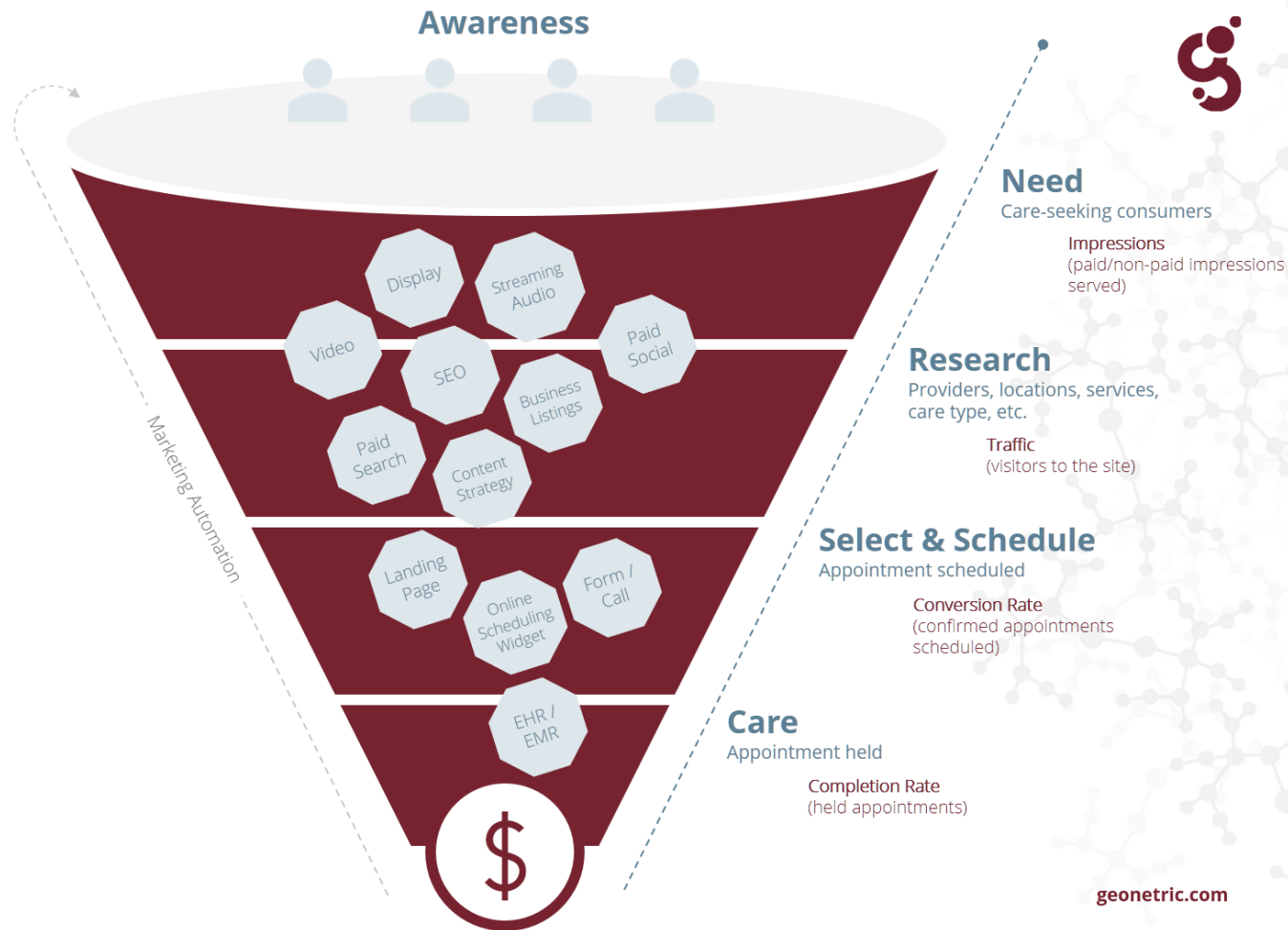
WEBINAR

Avoiding the Data Drop-off: Achieving Meaningful Measurement in Healthcare

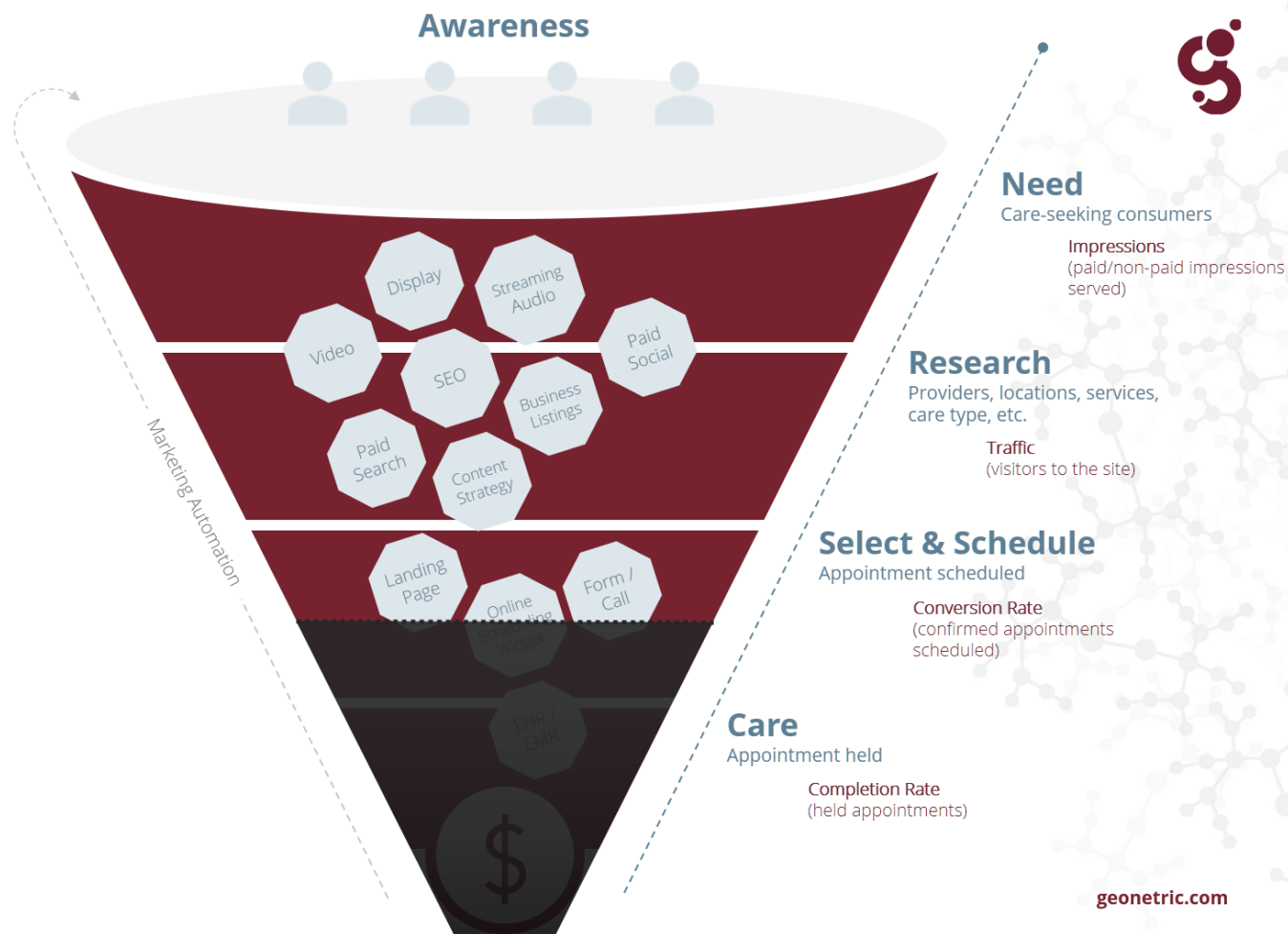
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Patient Journey Conversion Funnel



Patient Journey Conversion Funnel





Top barriers to digital marketing success in healthcare



Unable to support online transactions with offline operations



Unable to measure effectiveness or ROI

Lack of tools or infrastructure

Lack of expertise



Lack of internal buy-in



2020 Healthcare Digital Marketing Trends Survey geonetric.com



Three hurdles to attaining meaningful measurement

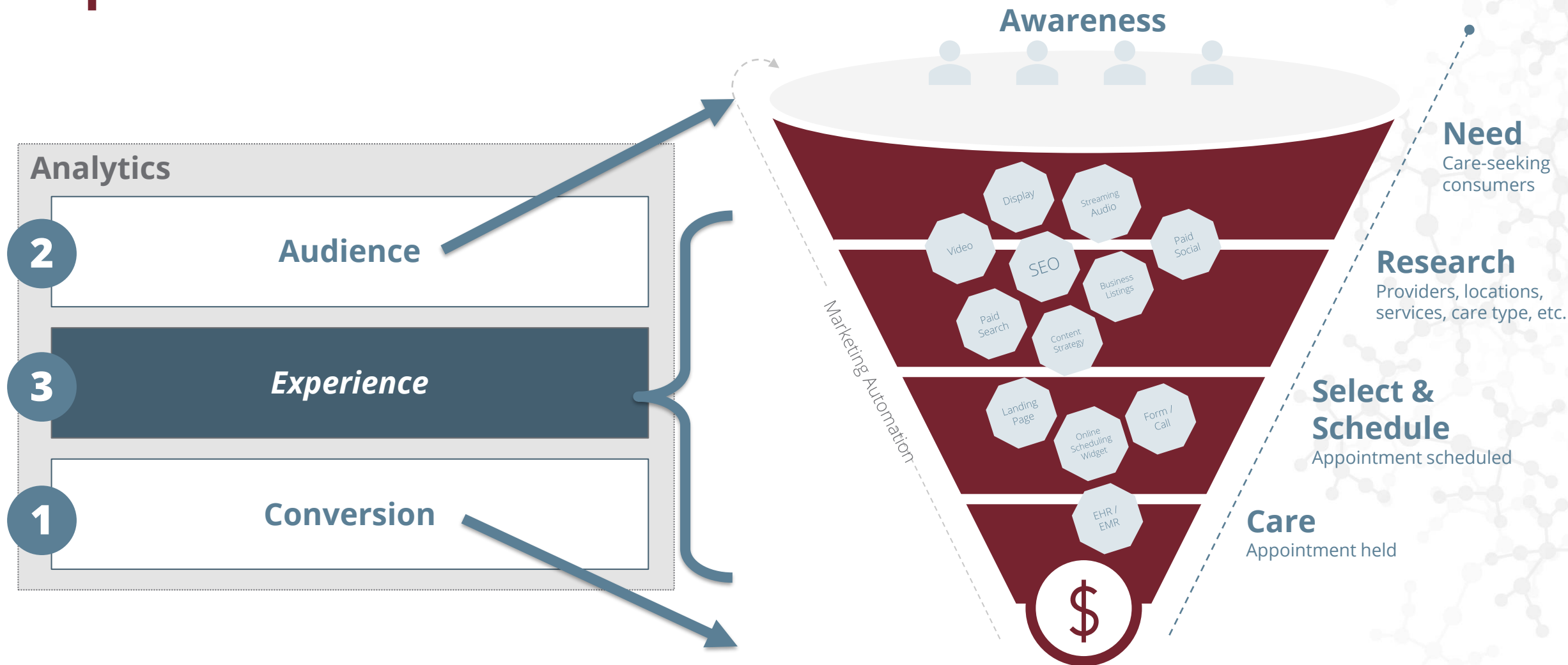
- 1 Lack of attribution
- 2 Connecting data between systems
- 3 Achieving offline measurement



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Personalization offers an opportunity to improve results





1. Prioritizing key conversions and actions

Which actions have the greatest potential for driving growth?

- ✓ Focus first on conversion points that result in direct business impact
- ✓ As needed, include digital actions that lead to offline conversion (but verify)
- ✓ Prioritize looser metrics (e.g., engagement) appropriately

Schedule an after-hours urgent care visit.

Watch new brand video for > 30s

Request a new patient appointment with a pediatrician.

Click to call nurse navigator phone line

Analytics

Audience

Experience

1

Conversion

2. Identifying and targeting audiences

Which groups of visitors are targetable and can directly impact your prioritized conversions?

Consider technical attributes as well as behavioral:

- ✓ Search, content viewed, abandonment of a path
- ✓ Digital and CRM campaigns or audience groups
- ✓ Device, time of day, geography

Users visiting the "Get Care" page outside of regular clinic hours.

Visitors who clicked through a paid social brand campaign

Visitors who clicked through a CRM-driven email campaign

Repeat visitors to this page



Analytics

2

Audience

Experience

1

Conversion

3. Tailoring the user experience

What changes in the experience make information and key actions more relevant for the targeted audiences?

- ✓ Prioritize and emphasize actions or information based on the user's context
- ✓ Create consistency across channels through shared messaging, creative, etc.
- ✓ Retarget actions or messages based on previous engagement

Make urgent care the primary call to action

Match hero image and copy to the ad campaign

Add a "Find a Pediatrician" button to navigation

Collapse the introductory text on repeat visits



Analytics

2

Audience

3

Experience

1

Conversion



Improving the experience begins by
understanding the audience.

Personas guide the experience by crystalizing who a personalization campaign is being designed for.



Heart Persona: Hardworking Howard

ABOUT

AGE RANGE: 45-65

STATUS: Married, with three children

OCCUPATION: Sales

PERSONAL INTERESTS & HOBBIES:

- DIY Projects
- Gardening
- Eating out
- Spending time with children and grandchildren

TECHNOLOGY & MEDIA HABITS:

- Scans local and national news articles online
- Utilizes LinkedIn and Twitter for networking and sports updates
- Watches the local evening news
- Monitors texts, emails, and Facebook on his phone to keep up with family and friends



I want a painless process when I see a doctor. It's important to me to be seen at my appointment time - I don't have time to wait. My doctor needs to listen and advise me on the best ways to avoid a heart attack.

NARRATIVE

Howard is a busy, outgoing person. He's known about his risk for heart disease for about 9 years. He's not an avid health consumer, but he does read online health articles when scanning the news.

He hasn't seen a primary care doctor for a physical for a year because his former primary care doctor retired. His previous doctor prescribed him cholesterol lowering medication (statin) three years ago. In the last year, Howard hasn't been exercising and has gained weight. He worries this may affect his risk for heart disease.

Prior to retiring, Howard's PCP advised him to see a cardiologist for specialized high cholesterol care to reduce his risk of heart attack. He has insurance coverage through his employer and specialist visits are covered under his plan.

Howard wants to find a cardiologist to check his heart health and wants to refill his cholesterol medication.

GOALS

- 1) Remain healthy so he can continue to work and support his family
- 2) Become more physically active and lose the weight he has gained over the last year



THOUGHTS & FEELINGS

- My cousin had some heart tests done awhile back; I'll call him and ask which doctor he went to for care
- I need a doctor who is covered by my health insurance
- I hope it doesn't take me long to get an appointment with a new doctor or specialist
- I'm worried about staying healthy as I get older
- I'm scared I might have a heart attack
- Will I have to change my lifestyle and stop eating all the foods I like?



PAIN POINTS

- Wants to be sure he gets a doctor with a good reputation from someone who goes to the doctor and recommends him or her
- Gets frustrated by wait times in doctor's offices and the time away from work for appointments
- Worried about medical care costs — potential out of pocket costs if he needs tests, medication, etc
- Finds the whole health care process confusing



NEEDS

- Preventive primary care and specialized heart care
- Education about how to prevent heart disease/lessen his risk
- Tools, education, and mentoring to help manage or make lifestyle changes
- Personalized care from a doctor who's genuinely engaged with his/her patients, listens, and explains things well



ACTIONS

- Ask his wife to print a list from their healthcare insurance website of plan-covered cardiologists
- Talk to co-workers or family members for doctor recommendations
- Search online for reviews about doctors

Value Propositions: Tangible ways your organization can assist this audience digitally



PAIN RELIEVERS

- Searchable online doctor and location directories
- Listing on doctor profiles:
 - Accepting new patients
 - Insurance plans accepted
- Messages about prevention and high-risk heart care at UHS
- Messages about efficient health care processes, such as timesaving digital procedures (fill out paperwork, etc.) and streamlined methods for shorter wait times



GAIN CREATORS

- Doctor star ratings and reviews on provider profiles
- Interactive maps that show practice locations in the San Antonio metro area in relation to user location
- Patient portal options for making appointments and communicating with doctors to save time
- Online health risk assessments
- Heart health classes



Journey mapping provides a guide for addressing the evolving needs of a persona over time.



Persona 1: Young & Healthy

Olivia has had health insurance through work for a while. She uses urgent care if she has a need, but her employer has been encouraging everyone to select a primary care doctor covered by their insurance plan.

She's thinking that might be best, as she's an avid runner and has recently had some knee pain. Maybe it's time to schedule physical therapy (PT) as well.

Thoughts – Feelings – Pain Points –
Goals – Needs – Actions – Gain
Creators – Pain Relievers

User focused

Doing

Thinking

Key Behaviors

Organization Focused

Digital Opportunities

Insights

	Natural State	Trigger	Research	Select & Schedule	First Appointment	Ongoing Care
	NATURAL STATE	TRIGGER	RESEARCH	SELECT & SCHEDULE	FIRST APPOINTMENT	
DOING	Eats well and exercises regularly. Gets annual flu shot.	Experiences knee pain while running.	Googles symptoms to determine need to see a doctor. Checks insurance coverage and researches doctors and care options.	Chooses a care option/doctor and submits a New Patient Appointment Request Form.	Travels to doctor's office. Checks in, shares insurance information and pays copay. Completes check-in forms. Sees doctor.	
THINKING	I try to lead a balanced life.	Something isn't right. I want to feel better quickly.	I want a doctor who'll listen to me, takes my insurance, is accepting new patients and has an office nearby. I hope I can find the right doctor online; I don't like doing things over the phone. I hope I don't have to wait long for an appointment. Which is the right care option for me: primary care, urgent care or express care? What's the difference?	I'm not sure if I selected the right "type of service" in the New Patient Appointment Request Form. I'm annoyed that I have to provide a phone number and wait for a call back. I wish I could just make the appointment online and be done with it. I don't like a lot of back-and-forth.	What's the parking situation? I hope it'll be easy to figure out and get to the right place when I'm at the building. How early do I need to arrive? What do I need to bring? I hope I don't forget anything. Next time, can I fill out these forms ahead of time at home?	
KEY BEHAVIORS	Doesn't think about health care.	Experiences symptoms. Begins thinking about health care.	Learns about care options. Uses online directories to search for doctors and care locations by specific criteria.	Uses online tools to complete tasks whenever possible.	I look up directions to the location. I check in, fill out forms, opt-in to MyChart at the reception desk and explain my symptoms to the nurse & doctor.	
DIGITAL OPPORTUNITIES	<ul style="list-style-type: none">Content marketingSocial media marketing/campaigns	<ul style="list-style-type: none">Content marketingService line contentSocial media marketing/campaigns	<ul style="list-style-type: none">Care option guidance/toolsInteractive mapsLive chatPPC campaignPrice estimator toolsRatings & reviews for doctors and locations <ul style="list-style-type: none">Searchable doctor and location directories, with ability to see insurance acceptedService line contentWait time visibility	<ul style="list-style-type: none">Live chatOnline appointment schedulingOnline preregistration and patient formsWait time visibility	<ul style="list-style-type: none">Content explaining how to prepare for an appointment, what to expect during an office visitInteractive mapsOnline preregistration and patient formsRobust location profiles with parking and wayfinding information, location-specific patient policies	
INSIGHTS	Majority of NRC respondents use some type of preventive care measures.	Only 24% of Millennials with insurance feel like a patient of their doctor all of the time, compared to 39% of the general population. —"A New Picture of Health," Barkley	84% of health consumers view digital solutions as the most effective way to search for a doctor —McKinsey & Company	"I like to cut down the amount of time I'm on the phone making requests because often you miss people when they ring you back." - UC San Diego Health live site user testing participant	40% of people living in the San Diego area are willing to travel 15 minutes or more for care of a nonlife-threatening illness or condition. —NRC	



— REFLECTION —

If you approached personalization from the bottom up, what would your next steps be?



3

Creating a sustained personalization program

Technology alone is not a
personalization strategy.



Personalization and optimization are
a core part of digital strategy.



Finding success with personalization requires new ways of thinking and working.

Moving away from ...

Internal focus

Guessing & opinions

Fear of “failure”

Project mindset



Moving toward ...

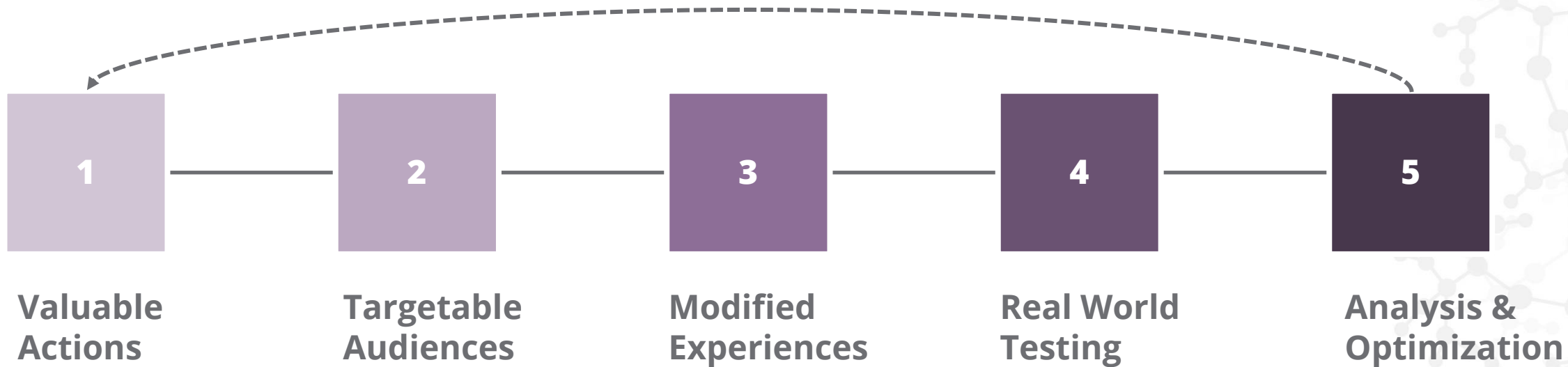
Consumer focus

Data-driven decisions

Support for continuous learning

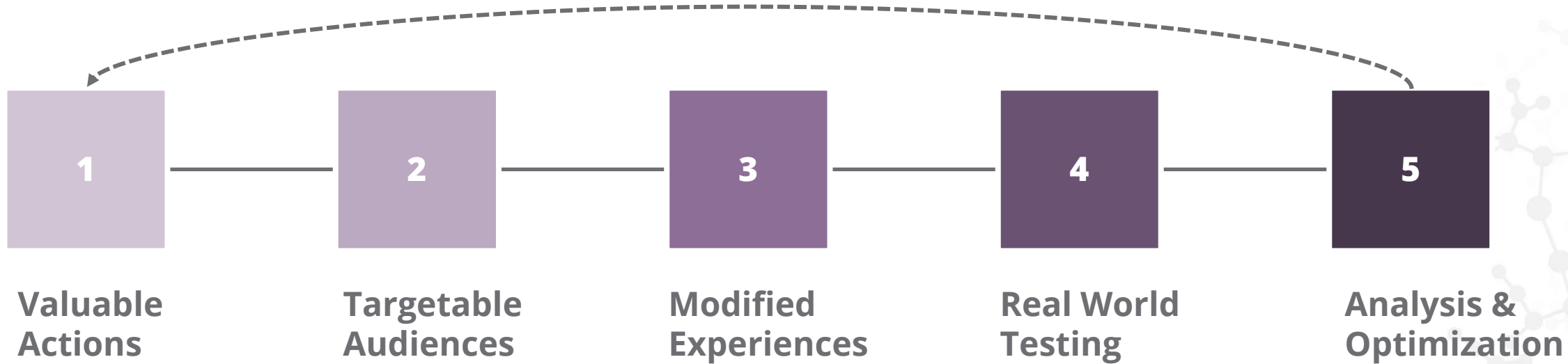
Sustained investment

A personalization program builds value over time through continuous feedback loops.





Example: Boost extended hours urgent care self-scheduling



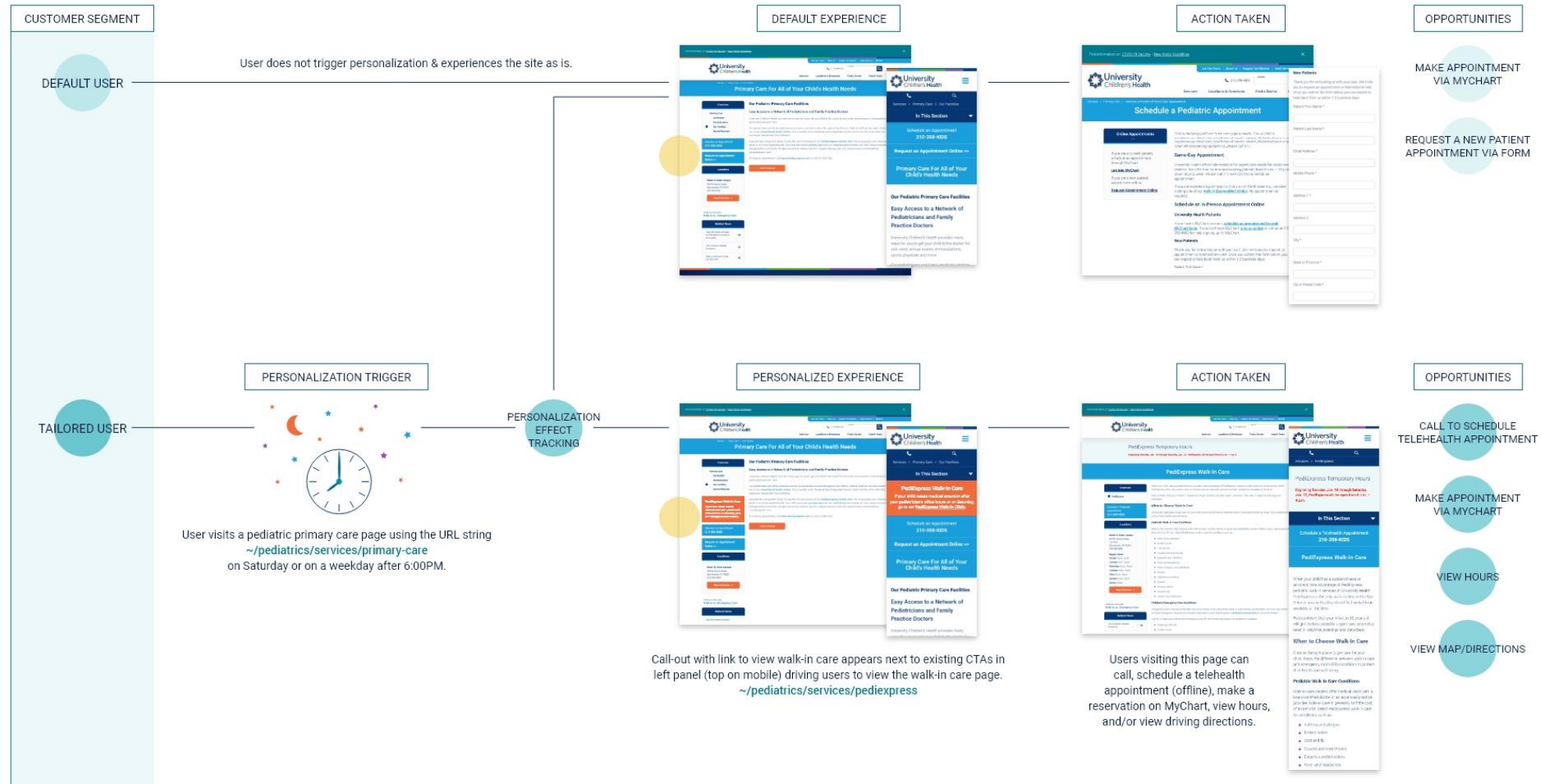
Schedule an after-hours urgent care visit.

Users visiting the "Get Care" page outside of regular clinic hours.

Make urgent care the primary call to action

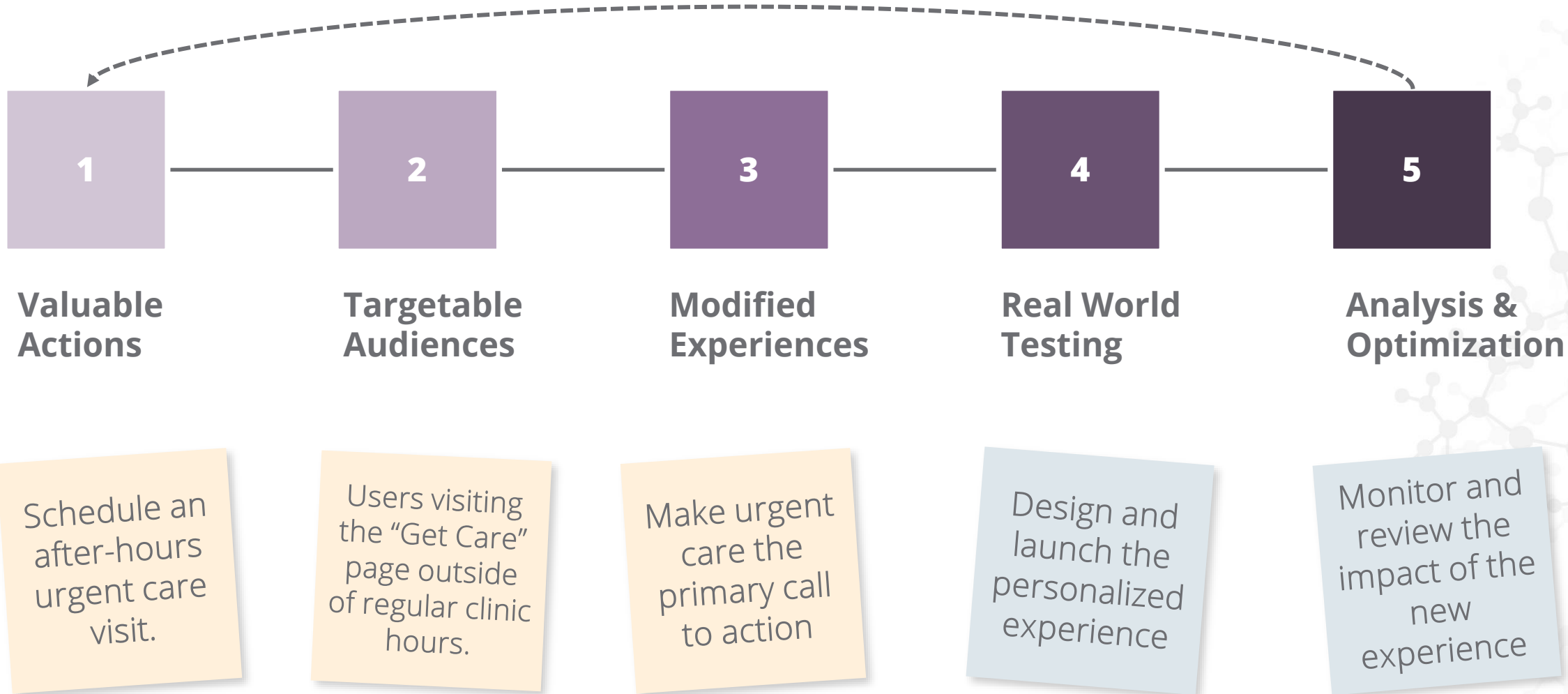
Consumer Experience (CX) Maps

Communicate Personalization Design



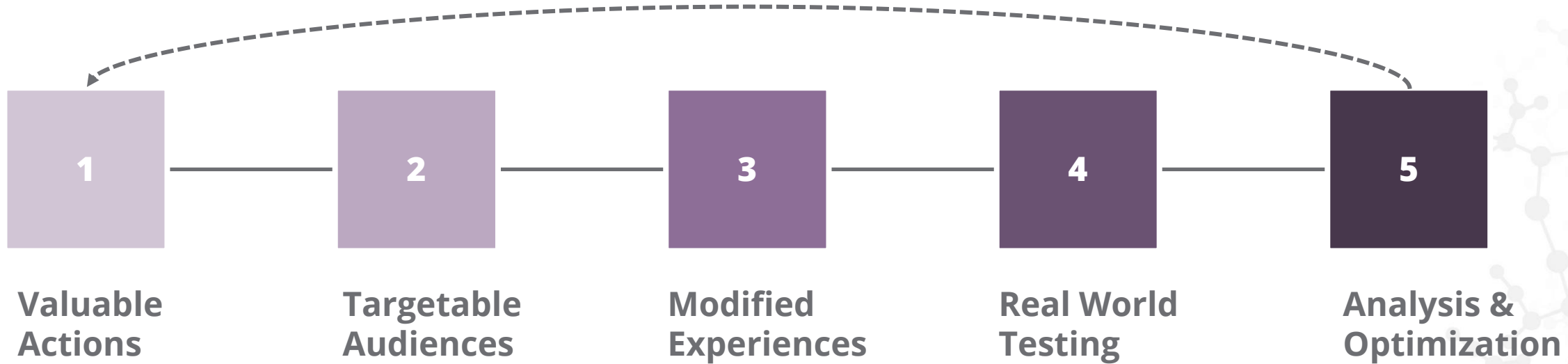


Example: Boost extended hours urgent care self-scheduling





Example: Increase new pediatric primary care patients



Request a new patient appointment with a pediatrician.

Visitors who clicked through a CRM-driven email campaign

Visitors who viewed pediatrics-related content

Add a "Find a Pediatrician" button to navigation

Match hero image and copy to the ad campaign

Design and launch the personalized experiences

Monitor and review the impact of the new experience



— REFLECTION —

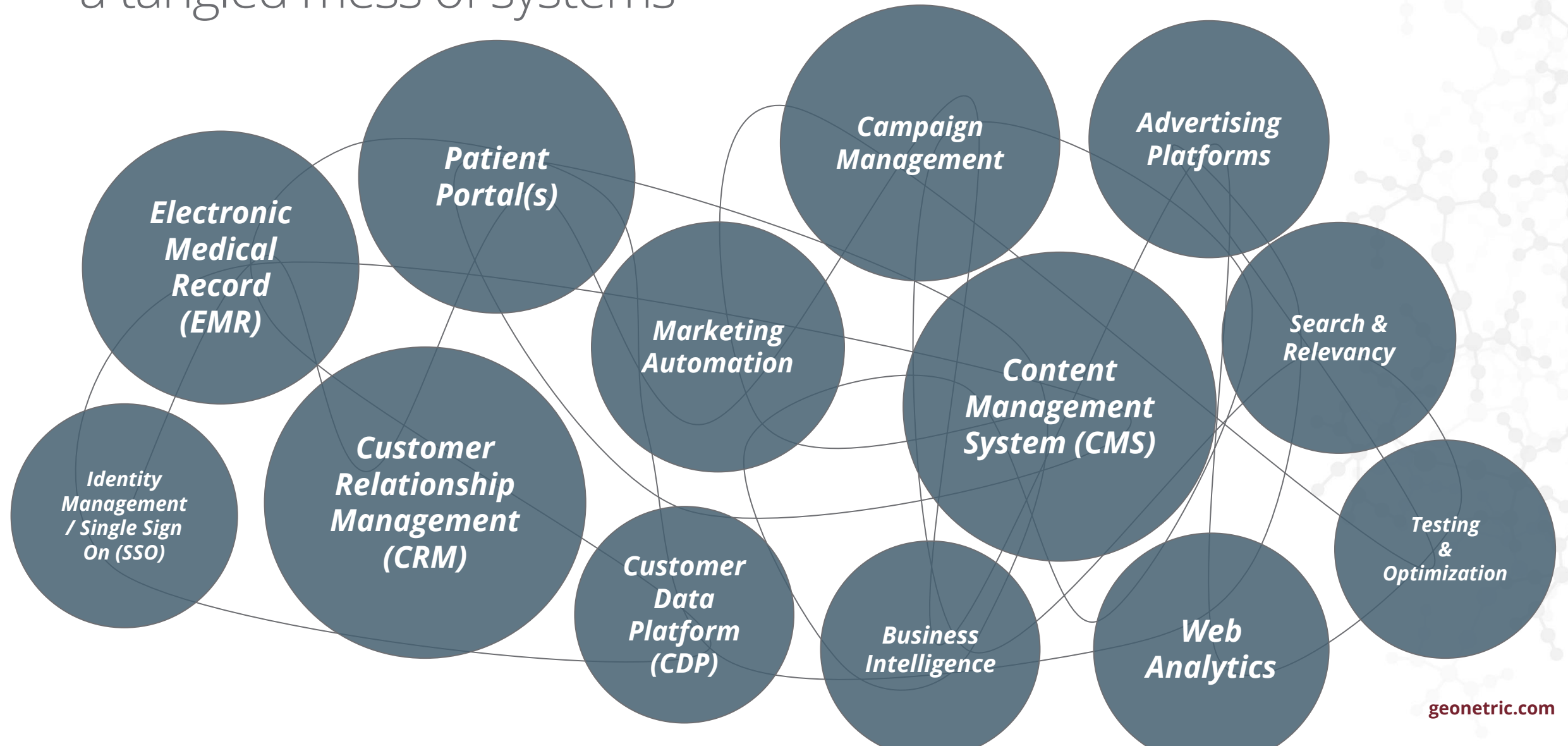
What is the biggest shift in organizational thinking needed to support a long-term personalization strategy?



4

Applying technology to
support your strategy

Creating more relevant experiences can involve
a tangled mess of systems



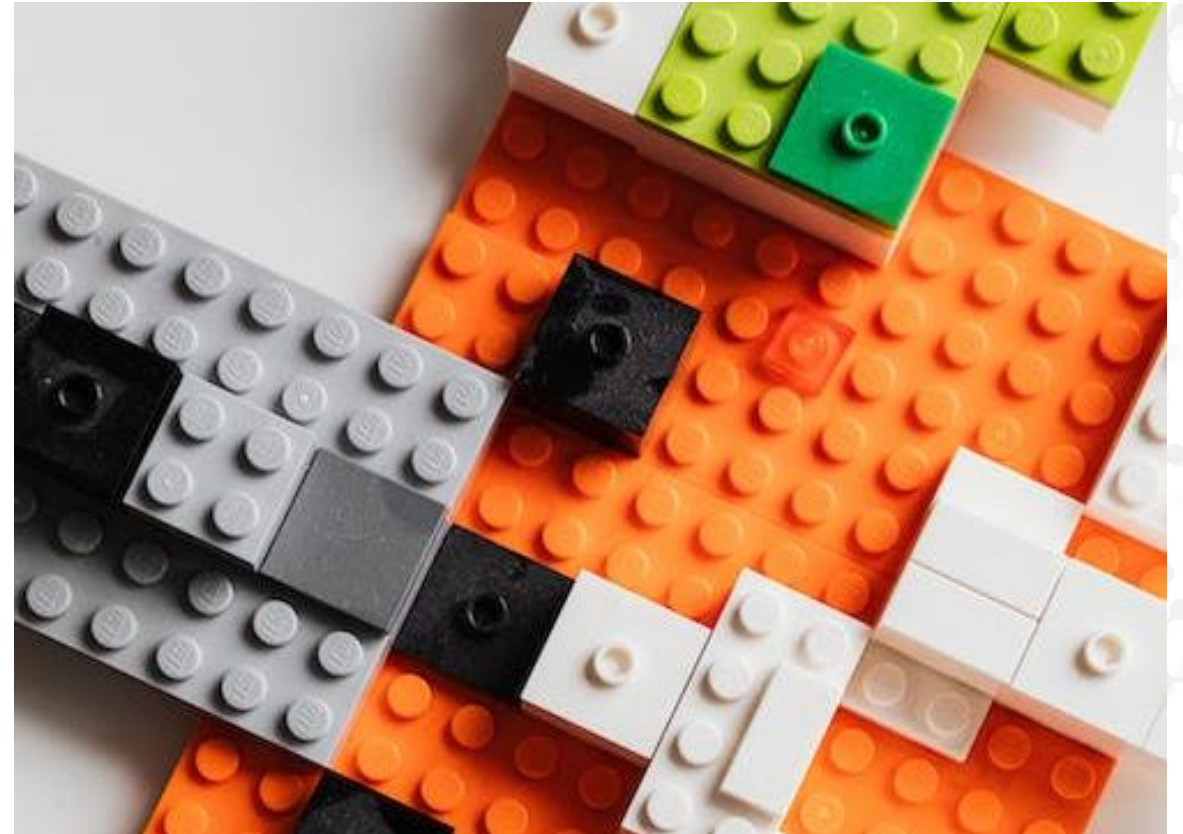


Platform vendors are shifting from broad, unified systems towards composable suites of more focused solutions

Unified



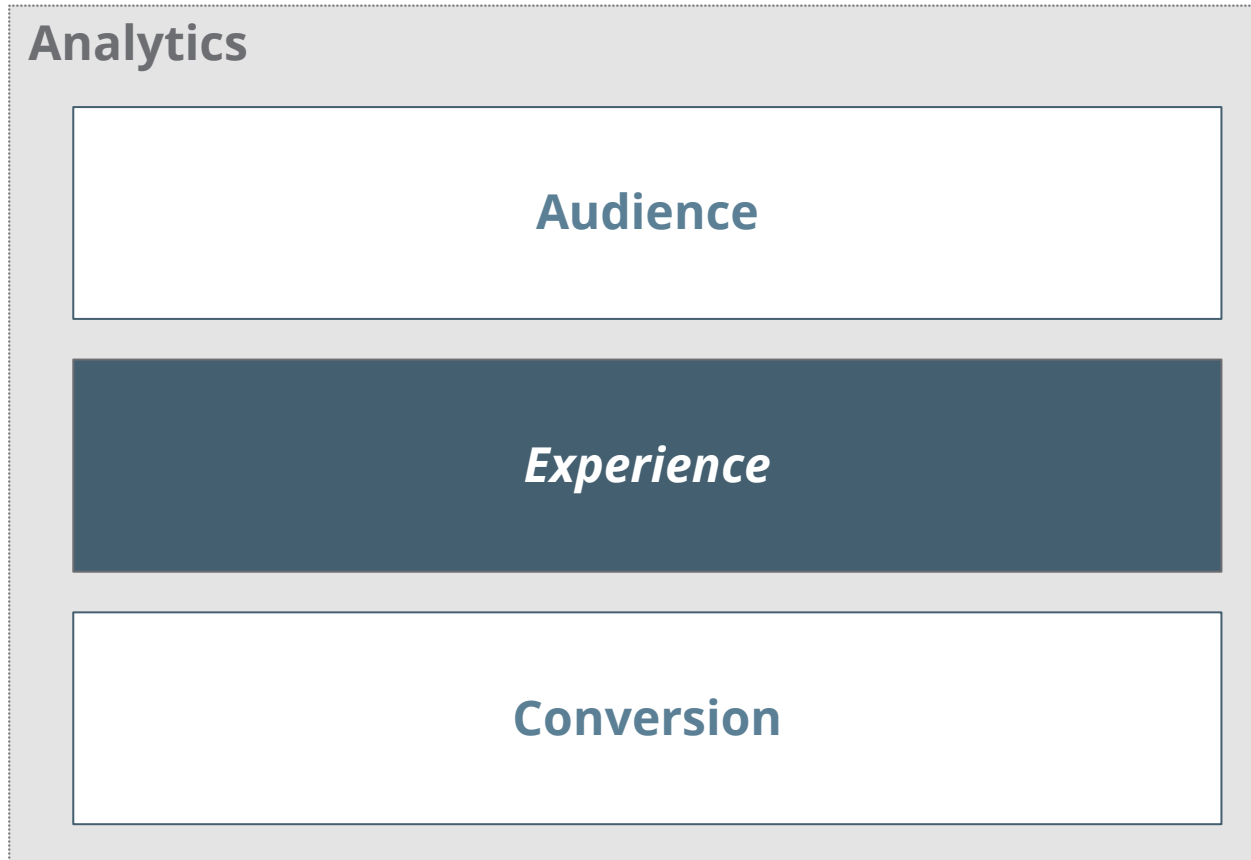
Composable





Breaking apart the personalization technology stack into layers can help focus the effort

- ✓ Directly drives the consumer experience
- ✓ Represents a huge range of options





Audience + Experience: Match the potential value to the effort and complexity of available options



User profile

No profiles

Non-identified profiles

Authenticated users

Scope of use

Single visit

Multiple visits

Omnichannel

Experience

Rules-based

AI / ML Recommendations

1:1 Next-best action

Personalization Technology

Questions to consider

- What is the set of tools and systems you have at hand today?
- Is there sufficient strength in your Audience and Conversions bookends to justify the need for a technology investment?
- What additional technology is needed to support the initiation of a sustained program?



— REFLECTION —

What technology is already in place to
begin your program and start learning?
What small additions are needed to grow from there?



Putting it all together

Key Takeaways



Personalization is an **opportunity to improve business results** through the process of creating more relevant, individualized digital experiences.



To get the greatest value from personalization, you must understand the **outcomes** you're looking for and the needs of the related **audiences**.



Personalization requires both **technology** and a **strategic program**.



Prioritizing efforts based on value within a sustained program allows organizations to achieve greater results from their personalization work.

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Helping healthcare brands thrive with effective digital strategies.



Personalization & Optimization Services

Strategic planning and execution of personalization and optimization programs.



User Experience

Support for user-centered experiences through user research, persona development, digital journey mapping, and UX audits.



Digital Experience Solutions

Technology platforms for creating and optimizing personalized healthcare digital experiences.

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Q&A with Today's Presenter



David Sturtz

Vice President, Experience Strategy

- Questions for David? Enter them in the chat!



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