# A PATIENT ENGAGEMENT TOOLKIT

LYNTON

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# INTRODUCTION

Salt and pepper, peanut butter and jelly, peas and carrots.

Patient engagement and inbound marketing are meant for each other, and this guide will show you how they come together to enhance the patient experience.

The greater a patient's engagement regarding their own healthcare, the greater the potential of their health outcomes. Once a patient is in the system, it's largely a function of administrative professionals, nurses and doctors; however, how do you get them into the system? How do you reach and engage the potential patients who are sitting on the sidelines?

The modern marketer knows that bullhorn marketing is hugely ineffective for reaching latent audiences. Seriously, can you imagine buying an email list to cold email a list of health services, or spend an entire quarter's budget on banner ads with a 0.5% click-through rate? Knowing what you do about the modern consumers' thirst for valuable content, these tactics seem wildly out of touch.

One of the core tenants of inbound marketing is to provide value before asking for it. Marketers accomplish this through high-quality content, typically in the form of blog posts, premium content and video. What those channels all have in common is that they require the reader, or patient in this case, to engage with the content to receive the value. Inbound marketing entails reading, watching, 'liking' and sharing.

Furthermore, this brings us back to the purpose of this plan—to show you how an inbound marketing strategy can not only increase leads, but patient engagement as well. We'll examine the theory of inbound marketing in the context of healthcare and share strategies of how you can implement the inbound methodology at your healthcare facility or practice—specifically on your website and other digital properties.

Let's get started!

# USING CONTENT TO ATTRACT
## Qualified Patients

Nobody can find you if they don't know you exist, and if your existence doesn't provide value to them, they won't even bother looking in the first place; and to be clear, we're talking about your **website**, not your healthcare service.

So how do you get found online, provide value to your web visitors and gain their trust?

The good news is that proving your online existence and providing value to your potential patients can be accomplished in one fell swoop with an end-to-end patient-focused website.

Let's talk about how to organize your website by discovering what content your audience wants, positioning that content, optimizing the content for search and promoting it to a larger audience.

# USING CONTENT TO ATTRACT
## Qualified Patients | Discovery

To effectively attract visitors to your website, you need to stop thinking about your patient acquisition goals for a minute and think about their goals, or more specifically, their problems. If this sounds simple, it is, but this line of thinking is absolutely vital to the patient engagement process.

It's not exactly news that people try to find answers to their problems online. In the medical context, think about the rise of symptom checkers online in the last few years, which are not without issues of their own—10 minutes on WebMD searching "elbow pain" and sure enough, elbow cancer.

The point is that you have to match your content to the patient's behavior first, and then filter by what your practice can provide, only after you've discovered their needs. Here are a few ways to discover the needs of potentially qualified patients.

### Ask Around

Talk to doctors, nurses and administrative professionals at your facility. What are the most common questions they get asked? You can always tell when you've found a good one, because the answer sounds rehearsed, like they've said it a thousand times—they probably have! Those answers are the foundation of great content that your audience is thirsty for.

### Dive Into Your Website Analytics

What are the most popular pages on your current website? If you spot a trend in certain practices areas, you might want to look at creating more content there. Look for pages that have significant **time on page** statistics—a lot of time on a given page is a sign of engagement.

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## Browse Social Media

You're on Facebook for market research, not to look at pictures of your friend's new baby! In all seriousness, social media contains a wealth of information about patients' problems, even their health issues. Browse healthcare-related Facebook Groups and look for trends in common complaints about medical service, administrative issues, etc.

## Look At Search Engine Data

This tactic is a little more technical, but worth the effort. Using free tools like Google Keyword Planner, you can find the search volume of particular phrases, along with the average cost-per-click (CPC) and competitive data. This is useful in understanding the language and keywords people search to research their problems. If your facility has ever ran Google AdWords campaigns in the past, the data is even richer. A reputable marketing firm should be able to uncover lots of useful information from search queries in the medical field.

If you've carried out any or all of the above discovery tactics, you should have a list of problems that qualified patients have. At this point, we suggest organizing your entire discovery into common themes.

For further reading on this topic, check out our blog post *How To Increase Subscribers To Your Healthcare Blog*.

**PRO TIP:**

*Don't forget administrative challenges! Part of the process to health improvement is scheduling appointments, checking lab results, etc., and those all come with their own set of challenges. Make sure to gather data about potential issues with your administrative process so you can proactively address them in the next step.*

# USING CONTENT TO ATTRACT
## Qualified Patients | Positioning

With your list of patient problems in hand (this is good thing!), it's time to start creating your content; we say "creating" and not "writing" because it could entail blogging, videoing or a mixture of both.

The trick to creating content designed to attract web visitors is to address their problems, to name them, *but not necessarily to solve them.* This may sound counterintuitive, but we'll address that further in the Convert section of this guide.

### Blogging

Take one of the problems you've identified in the discovery phase, match it to the persona of a qualified patient and start writing the answer to that specific question or problem. To get the tone right, pretend you're explaining something to a friend via email. That's blogging—not so hard, right?

Remember, only address one problem per blog post (unless you're writing a list that addresses a bigger, overarching problem) and save the rest for additional posts.

### Website pages

It's not totally realistic for web visitors to go scrolling through your site until they find what they're looking for—you have to organize it for them. Your static web pages should do just that; after all, they are the 'face' of your healthcare facility, the first step in the patient research process.

Use website pages to group together similar info and resources. This probably goes without saying, but make the pages attractive! Professional web design can improve metrics like time on page, pages visited and click-through rate (CTR). Internally linking your pages to other pages and your blog posts is also a great, if not sometimes overlooked, search engine optimization (SEO) practice.

With proper organization and internal linking, your website can become a hub for patients looking for answers.

### Tips for Creating Epic Content

- Study your competition and create something significantly better
- Embed mixed media (pictures, videos, GIFs, SlideShares, etc.)
- Make it sharable by adding 'click to tweet' functionality
- Include quotes from influencers
- Reference data and studies

You might be wondering, "How have I provided value to a qualified patient with these tactics? I haven't solved their problem yet."

It's true that perhaps you haven't solved their health issue yet, but what you've done is take a floating concern out of their heads, add detail and give it a name, which is inherently valuable. In this way, you've also gained their trust, all while engaging them in their healthcare journey.

Nonetheless, they still have to find the content! Read on to see some content promotion examples.

# USING CONTENT TO ATTRACT
## Potential Patients | Promotion

There is more content produced today than yesterday, and there will be even more produced tomorrow. You can't create quality content and hope that people find it; you must act to cut through the noise. You should be spending a significant amount of time promoting your content—generally speaking, **try to match the amount of hours you spent creating it**.

Here's how to get eyeballs to your content.

### Promote With Social Media

OK, you probably already knew this one, but that doesn't mean it's not important! And we don't mean posting once to Facebook and hoping for an avalanche of Likes, Comments and Shares. Create a schedule for social media distribution, write unique content for each different channel and utilize private and public groups to share your content far and wide. This part shouldn't be taken lightly—consider investing considerable company time or working with an inbound marketing agency.

## Increase Your Organic Search Traffic With Authoritative Backlinks

We discussed keywords earlier, but that is only one aspect of SEO. The amount and authority of the backlinks (links pointing to your blog post) have a huge effect on the search engine rank of your content. Use email outreach, professional contacts and PR to generate white hat backlinks.

## Advertising

Most companies use paid channels like Google AdWords or Facebook Ads to promote 'bottom of the funnel content', but it works great for engagement with awareness-level content too! Take a look at your best performing content on Facebook and consider boosting it with ads—if the content attracts a lot of engagement organically, it will make a good ad.

**PRO TIP:**

*Use a pixel to track the web traffic that you generate with ads. This way, you can monitor conversions based on your ads, and also configure retargeting to offer web visitors content that suits the next step of their journey to becoming a patient.*

# CONVERT WEB VISITORS INTO LEADS

Converting web visitors into leads is the primary goal of inbound marketing—without that step, you can't really do anything else! It's also the premiere signal of engagement.

But the lead is much more than just an email address in your database. When a potential patient converts on your website, it's a symbol of trust and *permission* to start a digital relationship with him/her. No pressure, but don't let them down!

Web conversion, in its most basic form, is the act of trading content for an email address. A potential patient usually does this by filling out a form on your website or landing page. They could be requesting premium content, a call back or even scheduling an appointment.

## A couple of rules for web forms:

- Limit the number of form fields to as few as possible
- Allow the patient to identify his/her persona
- Ensure that forms are accessible via mobile

### A note about conversion

We cannot stress this enough—web design is incredibly important to conversion, possibly the most important factor. Patients have an unwritten standard for design in order to trust an organization, and you *must* consider your mobile visitors when designing your site. Simply put, qualified patients have too many other things to do than wait for slow web pages to load or deal with a bad design.

For further reading on this topic, check out *7 Questions To Help Determine If You Need a Website Redesign*.

# CONVERT WEB VISITORS
## Into Leads | Premium Content

Do you remember how we first attracted the qualified patient to your website by addressing their problem? Well now it's time to offer them the next step in solving their problem, and premium content is a great way to do that.

There are two types of premium content we'll address in this toolkit: PDF guides and webinars.

### Guides

Guides are in-depth resources that are long form, heavily researched and visually compelling. Hey—you're actually reading one right now!

The content of a guide should move beyond addressing the patient's problem and dive into possible solutions. A quality guide will be thorough, objective and highly useful. You'll want to include your own service as a solution, of course, but it has to be handled carefully—you don't want to chip away the trust you've built by being overly promotional.
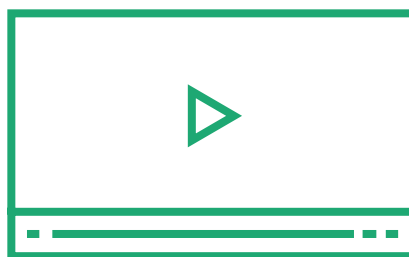
### Webinars

Webinars are a fantastic way to generate interest and leads with minimal time and investment. Patients and consumers see a lot of value in webinars when an expert is talking on a subject, because they can physically see the time invested to produce a quality webinar. When people sense value, and you add in the sense of urgency of a live webinar, they are likely to submit their email address as registration for the webinar.

**The good news is, they're not too difficult to put together. Here's what you'll need:**

**A relevant topic** - Go back to your list of qualified patient problems and pick a few from which you have some material. For example, many people have questions about the Affordable Care Act around open enrollment—perhaps spell out the process for them.

**A presentation** - This is a slide deck to act as a visual aid for your webinar. Use charts, images and not too much text on each slide. Try to throw in some entertainment about every 10 slides to keep things lively. In lieu of a presentation, you can always use your webcam to broadcast a talking head.

**Subject matter expert** - The better the content, the more likely you'll be able to close your webinar registrants in the future. Pick somebody who has the expertise, but also the personality to engage their audience.

**Webinar software** - Tools like GoToWebinar, WebEx and Adobe Connect are all popular services from the major players, but feel free to choose one that fits your needs and your budget. You'll definitely want a service that can handle live chat, so you can take questions at the end or during the presentation.

> *Bonus: If you record the webinar, you can re-use it as an on-demand webinar for people that couldn't make it to the live version!*

Just like all other pieces of content mentioned in this toolkit, you'll need to promote these pieces of premium content accordingly. Don't forget to use landing pages and forms!

Patients who download your guides and/or attend your webinars are considered highly engaged.

# CONVERT WEB VISITORS
## Into Leads | Online Appointments and Patient Portals

Patient website portals are kind of like the Holy Grail of online healthcare patient engagement. There are two reasons for this:

1. Patient portals allow users to get things done (schedule appointments, etc.) which encourages them to be an active participant in their healthcare

2. They allow for customized marketing material to be delivered based on their actions and unique needs

Patients want to talk with their doctors, and following other online behavior, they want to do it on their time (outside of normal business hours) and in a convenient fashion (from their laptop or smartphone). There are plenty of practice management software options to choose from, so find one that fits the culture of online patient engagement you've created with the other tactics in this guide.

Patient portals are not without issues, primarily in terms of user adoption from patients and staff alike. When used properly, however, they should be useful, convenient, and dare we say it, fun. Here are some ideas to increase patient engagement with your practice management software.
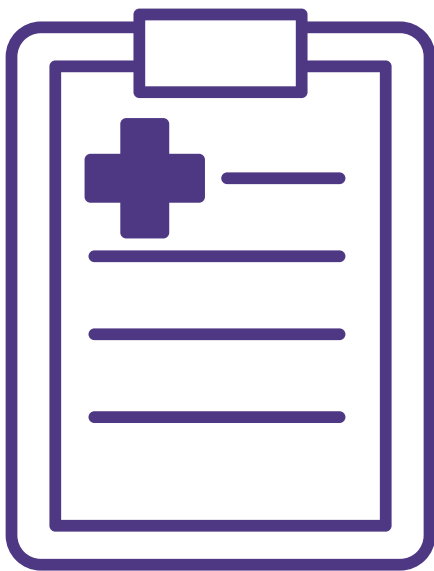
### Get your entire staff involved

If doctors find the tool useful, but admins roll their eyes when you ask them how registrations are going, you have an issue. When using the points below to increase adoption of the system, make sure to get everyone involved.

### Communicate benefits first

Hospitals and healthcare practices can be hectic, and just about everyone will try something to reduce that. Will increased use of an online patient portal reduce phone calls? Message that! Same thing with paperwork, medical refills, etc.

## Supply staff with scripts

Personal selling is still the most effective form of 'selling' use of a patient portal, but don't leave anything to chance. Give the staff key messages and bullet points that they can learn and communicate effortlessly.

## Bend over backwards to get the initial registration

Make sure an admin or nurse knows the system well enough to walk a patient through the signup process—without the initial registration, you're stuck. Make sure you have resources available to assist patients.

## Communication is two way

While the end goal is to have patients initiate engagement with your practice, don't wait around for them to take action! If you start using the portal to message them appropriately, they'll take the hint that this is the best way to engage with your facility.

When online patient portals work as they're intended, they can be that 'little extra' that solidifies the bond of trust between patient and healthcare provider.

To read more about what data to look for in website engagement, read *Growth-Driven Design - 6 Metrics That Matter*.
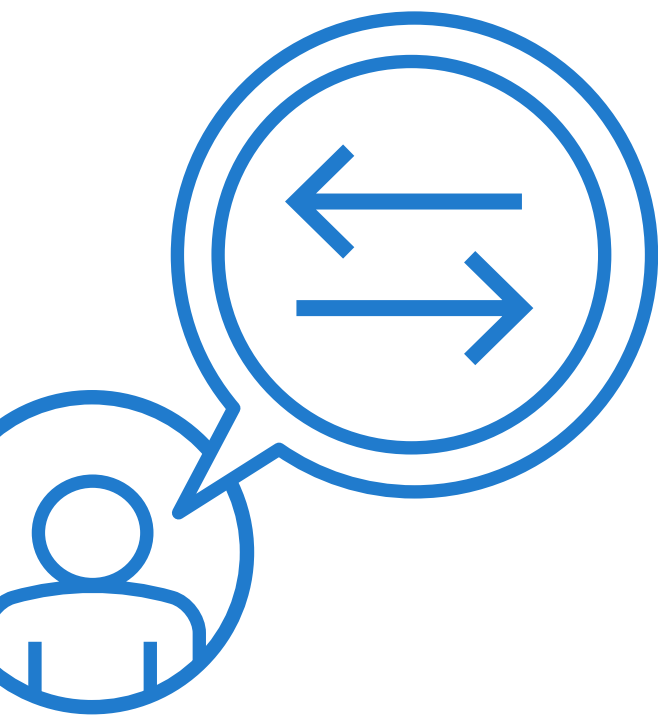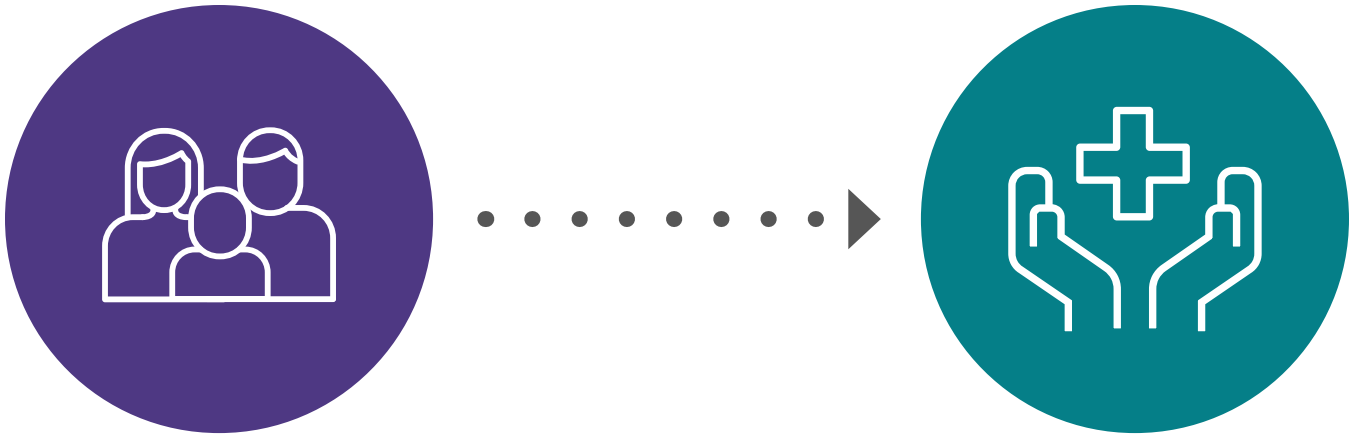
# CLOSE

At this point in the guide, we've put a ton of effort into making your website the center of an online marketing effort to increase engagement with qualified patients. What you cannot do right now is wait for them to close, to buy, to become a patient— you must be prepared to ask for the sale!

The rule of thumb for closing is be prepared; make sure you have answers to all these questions:

1. What's the most common channel for sales (phone call, in-person visit, online payment)?
2. Do you have online payments available? You should!
3. If you have a sales team, when and how do they access the leads you've created?

If you have solid answers for these questions, you're on the right track to closing patients. Here are some additional tips for aligning your patient marketing to increase your closing rate:

**1**   Speak a common language for how you talk about leads and prospects. This reduces confusion about which leads are ready for a closing message vs. more educational content.

**2**   Create rules for handoffs between marketing and patient care. Lead scoring with your CRM is a great way to do this.

**3**   Organize staff enablement tools that are easy to use. Have your patient acquisition team tell your the most common objections to closing new patients and create content and scripts to help them proactively overcome the objections.

**4**   Set common goals (for example, revenue) and meet regularly to discuss progress. You may find that there is some work being duplicated or other efficiencies you can implement.

**5**   Define your patient acquisition and retention strategy together—there's a huge difference between *more leads* and *better qualified leads*—find out which will work better for your team before implementing a strategy.

And don't forget to treat the entire process as an experiment in continuous improvement—publish, track, and optimize!

> *Speaking of optimization,* check out this case study of how a HubSpot website redesign boosted business:
> *Improving User Experience With a HubSpot Website Redesign*

# CLOSE | Finding Your Budget

As we get ready to bring this guide to the conclusion, perhaps it's time to address the elephant in the room:

*Where do you find the budget to pay for all this?*

If you're like many of the healthcare marketing professionals we know, getting the budget to pull off a patient engagement campaign is tough. We suspect that one of the reasons it's tough is because we, as marketers, don't do a good enough job of showing return on investment (ROI).

Calculating ROI has it's own challenges, but a good customer relationship management (CRM) tool can help you track your leads all the way through the funnel and assign credit to the marketing effort that generated (or even closed) the lead. A good CRM like HubSpot (there are many others, as well) can connect the dots of your marketing efforts and show you, in dollars and cents, what they did for your healthcare facility's bottom line.

But before you get a CRM, which is another expense, how can you justify a digital marketing campaign to your management, or more accurately, how can you estimate ROI?

Here's our suggestion.

### Step 1 | Assess the lifetime value of a patient

This one's pretty simple—how much, on average, is a customer worth to your healthcare facility? Do some research and jot down the number.

### Step 2 | What's the #1 way to close a new patient?

Is it a phone call, online payment, or some other channel? For this example, let's say that most people convert after a call with your sales team. You can adapt this to your preferred sales channel.

### Step 3 | What's the conversion rate of phone calls?

How many phone calls to get one sale? If the number is 5, you have a 20% conversion rate. We'll use that for this example. (If the leads are properly nurtured, you can increase this number.)

### Step 4 | How many online leads do you need to convert to a phone call?

Just because somebody downloaded your premium content or watched a webinar doesn't mean they're guaranteed to become a customer. More likely, only a percentage of online leads will close, or even ask for a sales call. For example, let's say it takes five online leads to generate one phone call.

### Step 5 | Calculate ROI with the numbers provided

If your target is 20 sales per month, that means you'll need 100 phone calls to reach that goal. To reach 100 phone calls, you'll need 500 web leads. Add up your average marketing costs to generate one lead and you can provide a recommended marketing budget that will generate a profit.

There's your ROI estimate. The process above is simplified and you'll have to do some digging and testing to fine tune your numbers. In our experience, if you take a data-driven approach to marketing, budgets have a way of working out in your favor.

# DON'T STOP THERE
## Delight Them!

Inbound marketing is all about providing value, and that doesn't stop once you've acquired a new patient.

If you've implemented even half of the patient engagement tactics provided in this guide, you've likely built a significant infrastructure to support them. You can use that same infrastructure not only to sign up new patients, but surprise and delight your existing clientele.

Here are some ideas how to keep your patients engaged for their entire lifecycle.

### Surveys

Distribute surveys semi-regularly to find out what your prospective patients want that you haven't provided them yet. This works in two ways—it engages patients and lets them know you're listening, and also provides value data you can't find anywhere else.

### Provide contextual offers

Since you're receiving data about the habits and the services these patients use, create offers and content that speak to those specific behaviors and watch conversion rates soar.

### Social media

Track patients behaviors with social media monitoring tools assess their sentiment through likes and other activity. Be proactive in reaching out or providing relevant content.



A Patient Engagement Toolkit

# LYNTON

## ABOUT LYNTONWEB

And there you have it—a Patient Engagement Toolkit centered around using your website and other digital assets you can use at your healthcare facility to increase inbound leads, convert qualified patients, and delight your existing client base.

We feel websites and digital marketing should connect with and enhance your marketing, customer service and lead generation efforts. For more information or to speak with a web design and inbound marketing expert at LyntonWeb, please contact us today!

## TALK WITH AN EXPERT
about your **inbound**, **web** and **tech goals**.

### GET STARTED TODAY