

Planning the Elephant Walk – Or How to Handle Your First Healthcare Marketing Role



FORTÉ *partners*

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"If the circus is coming to town and you paint a sign saying 'Circus Coming to the Fairground Saturday,' that's advertising. If you put the sign on the back of an elephant and walk him into town, that's promotion. If the elephant walks through the mayor's flowerbed, that's publicity. If you can get the mayor to laugh about it, that's public relations. And if you planned the elephant's walk, that's marketing." (Unknown source)

Whether you are brand new to healthcare marketing or have just taken on a new position, your role can be complicated because many don't fully understand what marketing is all about. Do yourself a favor and write a memo about what you want to accomplish in these first months on the new marketing job. Write this memo by yourself, away from your colleagues and do not write it after attending a meeting where service line managers or physicians are clamoring for promotion attention.

Let this memo serve as your marketing map for the next few months and provide you with a marketing platform that many managers and practice leaders have either forgotten about or simply do not understand – yet.

What should you say in the memo? The memo can be pithy or long but the essence of the memo is to ask and attempt to answer these questions:

- **What is my role as marketer? (Who am I in the organization?)**
- **What is the most important goal for this year? (What do I have to do?)**
- **Maximizing the available marketing resources, how can I reach that specific goal? (What resources do I need?)**
- **Can I do this alone? (Who is on my team?)**
- **What is my plan? (How am I going to do it?)**
- **What are my success measures?**

Marketing – More Than Promotion

Too, too often a marketing professional will hear, let's develop a brochure and send it out – that's how we will "market" our new service. It will be your job as the knowledgeable marketer to say that marketing and promotion are not the same things. Promotion is just the tip of the marketing iceberg – the part that sticks out above the waterline. There is the larger mass of the marketing iceberg that must be incorporated into your decision making. As the marketing expert, you will be charged to help your colleagues understand



the depth of marketing, and to help the entire organization understand some basic information about the service(s) you provide and the customer you need.

- What is the demand for this service?
- Who might be a target to use the service and how do we reach them?
- What are the features that will attract them?
- What kind of information do they need to make a decision?

These are the types of questions you want to answer before you simply “promote” a service. You don’t just want to throw promotional dollars out the door – you want to make sure your outreach is targeted and with focus.

There are also service questions that merit reflection and answers. You don’t offer your service(s) in a vacuum, so keeping tuned into the market and competition helps you provide for your customers and keeps them coming back to you. Some basic questions would be:

- How does the service meet the need?
- Who else offers the service?
- Who currently uses the service and where?
- What are the competitor’s strengths?
- Who pays for the service, and is pricing a critical part of the marketing analysis?

Assume the basics – you have a service (healthcare) and you have a customer (while this varies from where you sit, most likely you have patients and physicians as customers). Before you go any further, dwell on the customer and understand as much about who your customers are and what they want in terms. This might sound very simple, but this is actually setting your base for all that follows in marketing. The more you know about your customer and their needs, the more targeted your planning can become when it is time to utilize your resources. If you have brand new physicians in your market, your approach will be very different than if you are trying to get more volume from physicians who have been in your market for sometime but don’t consistently send their patients to you. Know your customers and what drives them.

What is Your Charge?

Just what exactly are you going to do this year that helps your organization? If your goal is to help increase volume for surgical services? You will need to plan backwards. If you want to increase the volume in your service line – you will need to examine your current situation. Who are the heavy referral sources? You want to make sure they remain happy. You can then split the remaining prospects in your market into two categories – those who have never admitted or referred to your network, and those who occasionally refer. The groups to target are those who have some experience with your organization. Who are they? What are their needs and how can you get them to refer



with more frequency? You will also want to make sure that the patients that are coming in your door are the kind of patients you want. While that sounds callous, it is really about focusing on your target. If you want to reach out to the elderly for a geriatric service, you will surely focus on Medicare patients – where they are coming from (zip codes, physicians, etc.); then you will want to develop features of your service that appeal to the targeted group specifically.

This is where your marketing tactics come into play – still working backward, you need to devise your methods and plan the execution. You also need to determine if this is the only approach you want to engage, or if you want additional strategies that will also move you closer to your goal of increasing the surgical service volume or geriatric patients.

Mapping the Plan

Once you have created an approach to reach your goal, you will need to assess what the various resources are that you will need. Will you rely on senior management or service line leaders to make relationship contact with targeted physicians? Will you need collateral to support the new features/physicians in the service line? Will you organize “meet and greet” events or provide CME sessions with new/splitter physicians in the area?

If you are taking over a new department, you often inherit a plan and a budget. Don’t resign yourself to living by someone else’s thinking. Consider your own plan to attain your goal and consider what budget items can be flexibly maneuvered. But don’t throw out the former plan just because it is not yours. Often the plan has a cultural awareness built into it that you won’t have -- so review the plan, make your own assessments and then blend your thoughts into the forecasted approach always keeping the marketing basics as your guideposts.

You Can’t Do This Alone

Whether you are new to marketing or not, you should know that you will get more accomplished if you have others “on your team” who will help you and your organization move the marketing concepts forward. If you can convince the Admitting Supervisor that collecting the accurate referral physician is worthy of training, emphasis and even rewards, you will have clearly moved a valued voice onto the side of the customer – the physician. So, take a look at your marketing plan and determine whom you need to help get some of your tactics accomplished. In most cases, this dual energy will be to the greater benefit of the organization. When was the last time only marketing was interested in volume and market share? Collaboration across departments starts with communication. Network Development, Physician Services/Recruitment and Planning should be strong considerations. Especially if you are new – talk to these people. See what their plans are for this next year. How can you work together for the good of the organization and the patients?

Formalize Your Plan

Now that you know what you are doing, who you are doing it with, formalize the plan. Commit your strategies with your tactics and include time lines and responsibilities. Keep this plan in the open and refer to it with frequency. The plan keeps you focused and reminds you of where you are going. Don't be afraid of making adjustments in your plan but be sure you communicate deviations so everyone moves in harmony.

What Does Success Look Like?

Doing a good job is one thing but knowing you have done a good job is also very important. What are the performance measures that you need to hit that will inform you and senior management that your strategies are working? Set up analytical targets at the onset and make sure you have these benchmarks measured at least quarterly. Communicate and celebrate the status of these performance measures with your team, and continue to find methods to improve and strengthen your marketing efforts.

Check-list for New Marketers

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| <ul style="list-style-type: none">✓ Write down your own goals to keep your overall efforts grounded.✓ Consider your role as the marketing leader – are you an educator about the marketing process as well as the implementer for the marketing plan? Do you need support to get your job done?✓ What is the central focus for the year? What is the most important goal that needs to be reached? Let this imperative frame your mission but don't let it blind your approach. Are there other elements that can be put into place along the way?✓ Conduct a resource assessment and review your budget parameter.✓ Develop a plan of action – the map for the year – include time-frame and responsibilities.✓ Who is on your team?✓ Be able to define success and know when you have hit your goal. |
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