

CRM in Healthcare Marketing

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CRM in Healthcare Marketing

Hospitals and healthcare systems find themselves in increasingly competitive environments that demand more personalized relationships and greater focus on the wants and needs of their target audiences. This theme weaves itself into the fabric of patient care, consumers seeking healthcare, the community at large, job seekers, referring physicians, and other key constituents. At all contact points, the “customers” of a healthcare system expect to be understood and demand increasingly better experiences.

Healthcare leaders are asked to develop communications and marketing strategies and leverage advanced technologies to facilitate deeper business relationships, streamline processes, and enhance customer satisfaction.

Among other organizational leaders, Marketing finds itself at the table to better understand customer needs and adequately leverage these tools to send the right messages at the right time.

But the proposition is complex. Within leadership, there are often varying perspectives on the most essential strategies and best technologies for managing the relationships of a wide array of health system customers.

This white paper was developed to provide an overview of the issues hospitals and healthcare systems face when addressing Customer Relationship Management (CRM) and to examine the strategies for implementing and utilizing this crucial technology. In particular, the white paper looks at this issue from the perspective of Marketing leadership and proposes possible solutions that can help organizations move forward successfully.



CRM

What Is CRM?

CRM stands for Customer Relationship Management. It is a strategy or software that many businesses use to manage interactions with current and potential customers. CRM aims to improve business relationships, streamline processes, and enhance customer satisfaction and retention.

CRM encompasses the following aspects:

1. Customer Data Management:

CRM systems help store and organize customer information, such as contact details, customer history, and interactions. These data can be analyzed and used to better understand customer needs and behaviors.

2. Engagement Management:

CRM tools often include features to track engagements, identify potential, and analyze performance. These features help those responsible for customer engagement to stay organized and focus on high-priority customers and prospects.

3. Marketing Automation:

CRM systems can automate marketing tasks such as sending emails, managing campaigns, and tracking responses. This helps to personalize communication and target the right audience.

4. Customer Service:

Many CRM systems offer tools for managing customer service requests, tracking issues, and providing support. These tools help resolve problems quickly and improve customer satisfaction.

5. Analytics and Reporting:

CRM comprises data and includes tools that provide insights and reports on various aspects of customer interactions and business performance. These data help businesses make informed decisions, understand which strategies are working, quantify the value of investments through KPIs, and identify growth opportunities.

CRM helps businesses build stronger relationships with their customers, improve efficiency, and drive growth.

Hospitals and healthcare systems use CRM to enhance operations, improve patient care, and get messages to potential patients and healthcare consumers.

Top Trends in Healthcare CRM

CRM is utilized in hospitals and healthcare systems for a multitude of reasons, but some of the primary categories include:

- Patient Care Communication and Data Management
- Appointment Scheduling and Management
- Patient Communications
- Marketing and Outreach
- Referral Management
- Billing and Payments
- Applicant and Employment Communications and Outreach
- Staff Coordination

Why Is CRM Important?

While some hospitals and healthcare systems have been working with CRM for years, others are just getting started, and a few have yet to start. Regardless, CRM is and will be a critical tool for every health system for the foreseeable future. We can confidently say this because the strengths and tenets of CRM are the building blocks for ongoing patient communications, patient experience, patient education, organizational engagement, efficiency, retention, loyalty, and much more. CRM leverages the data and technology necessary to meet the needs and expectations of key target audiences.

Let's examine some of the critical roles of CRM in a health system setting:

1. Marketing Communications:

The Marketing department is often the starting point for considering CRM in a healthcare system. Marketing sees the potential for targeted, personalized communications and improved tracking and conversion through multiple data sets, propensity modeling, persona management, and outreach. Healthcare system marketing departments have long focused on specific target populations for marketing communications and calls to action, and CRM provides a technology that dramatically improves those capabilities. Through propensity modeling and campaign management, healthcare system marketing activities become more effective, efficient, productive, and trackable. Marketing departments leverage CRM for campaign management and can track and report results to their internal target audiences. They use marketing automation capabilities to drive communications, and the associated analytics allow them to identify the best methods of communication, messaging, timing, follow-up, and calls to action.

2. Patient Experience and Outcomes:

Clinical teams also realize the immense benefit of CRM with a more personalized and timely approach to patient communications. By tailoring interactions and care plans, they see better patient compliance, increased quality of care, and improved patient satisfaction. This includes automated

reminders and targeted messaging to ensure patients receive timely information about appointments, tests, and follow-ups, reducing confusion and missed appointments. In addition, with CRM, the clinical team has data to demonstrate the effectiveness of "smarter" communications and improvements in patient satisfaction and outcomes. Collecting and analyzing patient feedback through CRM helps health systems identify areas for improvement and proactively address patient concerns. Comprehensive records maintained by CRM systems also support accurate documentation and reporting, essential for compliance with healthcare regulations and quality standards.

3. Patient Education and Population Health:

CRM tools facilitate improved processes and tracking for disseminating patient education materials and health tips that help patients manage their conditions. By analyzing demographic and health data across distinct populations, health systems can design targeted campaigns for preventive care, wellness programs, and health screenings, improving public health outcomes. Utilizing particular proactive health messages to target populations, healthcare systems see the impact of this information and advice, often leading to calls to action, improved outcomes, and a potentially healthier population.

4. Appointments and Streamlined Operations:

CRM systems support appointment management and scheduling process automation, reducing administrative burden and improving efficiency. Automated reminders decrease no-show rates and help maintain a smooth workflow.

5. Patient Retention and Loyalty:

CRM systems support continuity of care and foster long-term patient relationships by maintaining a comprehensive history of patient interactions and treatments. Some health systems use CRM to implement patient "loyalty programs," which can incentivize continued engagement and adherence to care plans.

6. Physician Relationships Management (PRM):

Another aspect of CRM is Physician Relationship Management (PRM), which is very effective for managing communications with community and referring physicians. Historically, referring physicians report feeling they “lose their patient” to the healthcare systems upon referral due to the deficit of communication about the patient’s ongoing treatment and care. With CRM/PRM, that communication stream can be automated and organized to keep the referring physician apprised and even provide specific access points to the Electronic Health Record (EHR). From the patient’s perspective, CRM can track referred patient interactions and follow-ups, ensuring that patients transition smoothly between different care providers and that no appointments are overlooked.

Additionally, organizations leverage PRM to enhance ongoing relationships and communications with referring and community physicians, to schedule connection points, and to support referring physicians. Once again, data tracking allows the organization to demonstrate the effectiveness of communications and various types of outreach and support and enables the organization to identify what is working and what is not.

7. Fundraising and the Hospital Foundation:

Similar to how Marketing might use CRM to reach patients and potential patients, the Foundation often uses a CRM tool to reach donors and potential donors. CRMs leverage data to calculate prospect propensity to ensure timely and targeted communications to critical prospects. In addition, the Foundation can manage existing donor communications, calls to action, and follow-ups. This tool manages campaigns, events, major donors, prospects, and fundraising activities.

8. Job Applicants:

Hospitals find themselves in stiff competition for talent. They compete with other healthcare providers for clinical team members; for many nonclinical positions, they compete with other local employers. Health systems leverage CRM capabilities to identify talent and develop target communications to potential applicants. In addition, they leverage CRM to manage existing applicant data and use the technology to provide follow-up communications and create a pool for future talent needs.

9. Enhanced Financial Management:

The technology, data management, and programming logic inherent in CRM is often used to integrate with billing and financial systems to streamline the invoicing process, track payments, and manage insurance claims more efficiently. By analyzing financial data, CRM helps identify patterns and opportunities for improving revenue cycle management and reducing administrative costs. It is used for ongoing communication, and analytics show that leveraging CRM leads to increased collections and faster payments.

This list is just a start. Without question, CRM systems are integral to modern health systems as they enhance patient care, streamline operations, provide valuable insights, and support effective communication and coordination. By leveraging CRM technology, health systems can improve patient outcomes, operational efficiency, and overall service quality.

The Importance of Defining and Implementing a CRM Strategy

Defining a robust Customer Relationship Management (CRM) strategy in today's competitive business landscape is crucial for building strong customer connections and driving growth. However, many organizations need help distinguishing between CRM as a strategic framework and CRM software as a tool.

This common confusion can lead to the misuse of technology without a clear understanding of its purpose, ultimately hindering the achievement of business objectives. A successful CRM strategy involves a comprehensive approach that aligns with the company's goals and customer engagement processes. At the same time, the software serves as a vehicle to support and execute that strategy effectively. Understanding this distinction is critical to leveraging CRM to its full potential.

Understanding CRM Strategy

A CRM strategy is a comprehensive plan that organizations implement to effectively manage and analyze customer interactions and data throughout the customer life cycle, improving customer service, enhancing customer retention, and driving sales growth. It focuses on developing strong customer relationships by tailoring marketing efforts, personalizing customer experiences, and ensuring that all departments are aligned in their customer-centric approach.

In contrast, CRM software is a tool or system that automates, stores, and analyzes customer information and interactions. While CRM software helps execute a CRM strategy by providing the technological backbone for managing data, the plan encompasses the broader objectives, processes, and practices necessary to leverage customer insights and foster deeper relationships.

Defining Success

To ensure a successful CRM strategy, organizations should focus on the following fundamental needs:

- 1. Clear Objectives and Goals:**
Establish well-defined goals that align with the organization's strategy to guide CRM initiatives effectively.
- 2. Customer-Centric Culture:**
Foster an organizational culture that prioritizes customer satisfaction and engagement at every level.
- 3. Comprehensive Data Management:**
Implement systems to collect, store, and analyze customer data accurately, ensuring data integrity and accessibility.
- 4. Integrated Technology:**
Utilize CRM software and tools that integrate seamlessly with existing systems to provide a unified view of customer interactions.
- 5. Employee Training and Engagement:**
Ensure team members are well-trained in CRM practices and understand leveraging technology and data to enhance customer relationships.
- 6. Continuous Evaluation and Adaptation:**
Regularly assess the CRM strategy's effectiveness and adjust to changing customer needs and market dynamics.

Specific Challenges for Healthcare System Marketing Teams in Developing a CRM Strategy

In healthcare, marketing teams face unique challenges when developing a CRM strategy. Unlike other industries, healthcare organizations must navigate stringent privacy regulations, diverse patient demographics, and complex communication channels. Moreover, balancing patient care with marketing efforts requires a nuanced approach to relationship management. Successfully addressing these challenges involves creating tailored strategies that respect patient confidentiality while fostering meaningful engagements. As healthcare marketing teams seek to harness CRM's potential, understanding the industry's intricacies becomes paramount for building trust and driving patient-centered outcomes.

Key Healthcare Considerations

1. Data Privacy and Compliance:

Healthcare systems must navigate stringent regulations, such as HIPAA (Health Insurance Portability and Accountability Act), to ensure patient data privacy and security. The increased sensitivity to privacy complicates data collection and management processes essential for CRM strategy development.

2. Integration with Existing Systems:

Many healthcare organizations rely on legacy systems, making the integration of new CRM software complex. Ensuring the smooth flow of information across different platforms is crucial for a cohesive CRM approach.

3. Diverse Stakeholder Needs:

Healthcare CRM strategies must cater to various stakeholders, from patients to providers, insurers, and regulatory bodies, each with distinct needs and expectations.

4. Measuring Success:

Quantifying the success and ROI of CRM initiatives can be difficult in healthcare, where the impact on patient experience and satisfaction might not immediately translate into financial metrics.

5. Resource Constraints:

Limited budgets and staffing can hinder the development and execution of comprehensive CRM strategies, necessitating prioritization and strategic resource allocation.

6. Rapid Technological Advancements:

Keeping up with rapidly evolving healthcare and CRM software technology requires ongoing education and adaptation, which can be challenging for marketing teams.

7. Patient Engagement and Trust:

Building trust and engaging with patients through digital platforms requires careful communication strategies to ensure patients feel valued and secure.

Benefits of Implementing a Successful CRM Strategy

Implementing a successful CRM strategy has numerous advantages that can significantly enhance a company's performance. Organizations can improve operational efficiency, boost customer satisfaction, and drive business growth by effectively managing customer relationships. The following section outlines the top benefits businesses can expect from a well-executed CRM strategy.

Key Outcomes of a Successful CRM Strategy

1. Enhanced Customer Satisfaction:

A CRM strategy effectively addresses customer needs by providing personalized interactions and improving service delivery, leading to higher satisfaction and loyalty.

2. Increased Efficiency and Productivity:

Automating routine tasks and streamlining processes allow staff to focus on more strategic activities, improving operational efficiency and productivity.

3. Improved Customer Retention:

By better understanding customer preferences and behaviors, businesses can anticipate needs and reduce churn, fostering long-term relationships and customer retention.

4. Data-Driven Decision-Making:

Access to comprehensive customer data allows organizations to make informed decisions, identify trends, and anticipate market shifts, strengthening competitive positioning.

5. Revenue Growth:

A CRM strategy can drive sales growth, increase conversion rates, and enhance profit margins through targeted and effective campaigns by optimizing marketing efforts and sales processes.

As you embark on this journey, the following section will guide you through best practices for CRM software to ensure your tools are as effective and synergistic as your strategy. With these insights, you can confidently take the next step toward a more connected and customer-driven future.

CRM & Automation Platforms

In today's competitive landscape, using a Customer Relationship Management (CRM) platform is essential for organizations to enhance their interactions with customers, patients, or members. These sophisticated tools streamline relationship management, drive operational efficiency, and convert interactions into lasting relationships.

Tools & Technology at the Heart of CRM

CRM solutions come in various shapes and sizes, tailored to meet the specific needs of the business. Enterprise-level solutions like Salesforce, Microsoft Dynamics, and LeadSquared stand out. They are designed for large organizations with thousands of users and millions of records. They seamlessly integrate with existing systems, offering robust support for Electronic Health Records (EHRs) and proprietary/first-party data stores or data lakes.

Meanwhile, platforms such as HubSpot, Mailchimp, and Constant Contact provide modular elements, creating a customizable CRM ecosphere.

It's crucial to recognize the niche healthcare-specific CRMs like LionShare, Loyal, and Cured designed to address the healthcare sector's unique challenges and data intricacies. With spreadsheets and email tasks still prevalent among some, there's a ripe opportunity for these institutions to evolve through CRM adoption.

What Defines a "Good" Marketing CRM?

Within the marketing arena, a competent CRM should offer key capabilities that elevate performance:

- **Patient Acquisition:** Leverage marketing automation for efficient onboarding.
- **Patient Retention:** Harness personalized engagement, reflecting previous interactions.
- **Patient Experience:** Provide an omnichannel communication approach to enhance accessibility.
- **Data Centralization:** Maintain comprehensive data and supplement EHRs by capturing patient and prospective data.
- **Task Automation:** Alleviate staff workload while fine-tuning the patient journey.

- **Seamless Integration:** Sync effortlessly with critical systems, including EHRs, telephony (text messaging, video conferencing, voicemail, call recording, and faxing), and scheduling software.
- **Insight Generation:** Deliver in-depth analytics, empowering organizations to track campaign ROI, analyze call center efficiency, and pinpoint drop-off points in the patient journey.

Automation: The Game-Changer

CRM automation revolutionizes daily operations by eliminating manual, error-prone tasks:

- Minimize human error, boosting data handling capabilities.
- Enable precise segmentation and personalization of marketing efforts.
- Optimize resources, cutting down administrative costs.

Aligning automation with distinct patient journeys enhances campaign management. Typical automation encompasses:

- **Data Management:** Automatic updating of contact lists and tracking of engagement.
- **Automated Communication:** Sending timely reminders and informative content.
- **Intelligent Scheduling:** Streamlining consultations and follow-ups.
- **Task Direction:** Swiftly assigning responsibilities to appropriate staff.
- **Document Handling:** Simplifying document exchanges and dissemination of critical content.
- **A/B Testing:** Fine-tuning marketing elements through iterative testing.
- **Lead Scoring:** Utilizing engagement and demographic insights for predictive analytics.

Incorporating CRM software into an organization is more than a technological upgrade—it's a strategic advantage that empowers businesses to build deeper connections and optimize their processes efficiently.

From the Trenches: Healthcare CRM Chronicles

Customer relationship management (CRM) strategies are crucial for enhancing patient engagement and efficiency in the rapidly evolving healthcare landscape. This section explores how two leading healthcare systems develop and implement CRM strategies. By examining their decision-making, technology integrations, and adaptations to industry challenges, we gain insights into innovative approaches for fostering patient interactions and improving service delivery.

The evolution of a CRM strategy at Baptist Health South Florida



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As Assistant Vice President, Digital & Marketing Technology at Baptist Health South Florida, Val is a digital marketing professional motivated to transform healthcare and the patient experience through digital solutions and digital marketing. He focuses on the marketing technology stack to enhance the consumer experience and improve marketing execution through specialized experience in web development, CRM, marketing automation, analytics, SEO, SEM, and campaign planning and execution.

The journey began in 2010, as the marketing department at Baptist Health began to search for a healthcare marketing CRM. We were centering the health system's marketing strategy on the capability of utilizing data to identify and segment audiences for targeted marketing outreach. This was a transitional period for the marketing strategy, as we looked for a tool that would allow us to analyze data for insight into who our patients were and how we could reach specific audiences. At the same time, we had begun the strategic shift to digital and away from investment-heavy traditional mass advertising tactics.

The lessons from those years are still relevant when evaluating, onboarding, and operationalizing a CRM. It all started with data. This was the beginning of Marketing coming to the table to ask the organization for data. Operations and IT departments were puzzled about our interest and request for data. These strategies were primarily patient-acquisition strategies designed to find the right audience to target and recruit additional new patients and improve ROI to a service line and organization. We began with the segmenting and targeting capabilities, layering in the propensity to help find new patients to the health system or new patients to a service line. Once audiences were identified, we could execute direct marketing tactics via postal mail or email, utilizing data to create marketing strategies, identify target audiences, and inform other marketing tactics such as paid media for patient acquisition. For the first time, marketing had the ability to report with metrics relevant to various business stakeholders. We were pushing past traditional marketing metrics like

impressions and clicks, providing ROI and contribution margin metrics for campaign reporting, and gaining credibility with our Operations and Finance partners within the organization. This took time, but we were executing a more sophisticated marketing strategy that was trackable and that justified the investment into healthcare marketing.

Baptist Health executed its CRM strategy effectively for several years. Often with the same “recipe,” just different ingredients adjusted to the specific factors and considerations within each service-line marketing campaign. However, every good strategy requires an evolution over time—an evolution in CRM strategy that should be specific to the organization. Understanding the organizational readiness and appetite for the various specifics of an evolution is needed. The evolution at Baptist Health began in a few key areas at the given time.

1. **Retention and loyalty.** Patient acquisition is essential, but what about our existing patients? A few of points stand out:
 - a) We needed to focus on Marketing’s ability to communicate with the patients already utilizing services. Patient retention and cross-selling relevant and downstream services, often within a patient’s care journey.
 - b) Marketing found itself back at the table with Operations and IT, providing the department with the skill sets and expertise needed to communicate with the patient throughout the patient journey.
 - c) The investment in patient acquisition was required to continue, but the investment to acquire that patient warranted a better execution to keep the patient within the health system’s ecosystem.
2. **Closer to real-time data.** Sure, we were utilizing data, but the integrations to ingest and use that data were resource-intensive and commonly had a significant lag in time before it was actionable. Not surprisingly, getting data from the EHR was a challenge. The health system’s data strategy introduced options to pull data from data warehouses in near real-time rather than from source systems.
3. **First-party data.** The health system had more than EHR data to help Marketing understand the patient better and increase the relevancy with a timelier

and more accurate message. Digital tactics provided first-party data, allowing us to better understand patients and consumers. This led to an increased understanding of their interests and preferences based on their actions across the health system on our digital properties.

4. **Automation & Personalization.** Leveraging additional data and advanced marketing automation capabilities created interest in personalization and adding SMS text to the marketing toolkit. Personalizing digital experiences across email, web, and mobile app focused on relevancy and adding value to the consumer/patient.
5. **Enterprise CRM.** Looking outside the healthcare industry, others were investing in enterprise CRM strategies, not just marketing CRM strategies. EHRs have their place as they manage the clinical experience. Enterprise CRMs manage the customer experience. Baptist Health was challenging itself to provide an understanding across the health system. Marketing’s CRM in a silo was not connected to all touchpoints and experiences across the health system and would fall short of the vision. Success required growth and flexibility to utilize the above evolutions for all touchpoints, such as call centers, clinical portals, and the health system’s mobile app, for a relevant and personalized experience.

Beginning with the strategies and use cases, Baptist Health began looking to evaluate the data and technology to implement its strategy. This included surveying and assessing platforms and technologies that could execute an evolved CRM vision. The technology was not the strategy.

In summary and with humility, this evolution is not easy. The 14+ year journey at Baptist Health continues to evolve and is met with challenges. Baptist Health has not achieved proficiency in all use cases. We have started with baby steps in many use cases and continue working through challenges and the required change management. We recommend you start by identifying specific use cases to set a vision for a CRM strategy. Find the platform and tools to help you accomplish that vision and jump in. Organizations need to understand that evolution is iterative, and it is not plug-and-play or out-of-the-box ready.

Navigating a world with multiple CRM platforms at UNC Health Care



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Leads a team responsible for devising and executing research-driven, consumer-focused online experience strategies and evaluating/ implementing underlying technologies across a prominent, multi-hospital health system. This has included a complete re-platform and relaunch of unhealth.org, resulting in measurable improvements in online satisfaction and a 5X increase in online appointment conversion.

In my experience across multiple health systems, CRM has been one of the most challenging areas to advance—particularly if you’re pursuing an enterprise strategy rather than focusing on CRM for marketing. This has undoubtedly been the case at UNC Health.

When I joined UNC Health in 2019, a healthcare-specific marketing CRM platform was already in place and used primarily to deploy email and direct mail campaigns. However, for numerous reasons, there was a need to consider alternative solutions and a desire to broaden the strategy to encompass not just marketing but functions across the health system. While conceptually the right approach, expanding from a marketing focus to an enterprise strategy introduced challenges that have made realizing the total value of CRM elusive to this day.

From a strategy standpoint, we successfully built a coalition of stakeholders representing essential functions touching the customer journey. This coalition included marketing, care access, network development, population health, and IT. Together, champions from these functional areas developed a shared vision that included breaking down internal silos and creating seamless experiences across touchpoints. This shared vision informed our consideration and evaluation of the technology needed to execute our strategy.

One of the most effective methods we adopted was to craft user stories rather than use cases to define requirements. User stories are perfect for communication and collaboration, and they focus on the people who will be using the technology, their goals, desired outcomes, and the value they expect various features to deliver. User stories were generated within each functional area and compiled to identify essential requirements that were either common across groups or unique but critical to any one group.



After an extensive evaluation period we ultimately chose to transition CRM platforms, and began the process of migrating to a leading enterprise solution. This process wasn't as smooth or successful as desired, but through this process we gained valuable insights and learnings. If you're still early in your CRM journey, here are a few things I'd recommend:

- **Clearly define ownership and accountability:** Many health systems are structured in ways that may make sense internally, but ultimately distribute responsibility for the consumer experience across departments. This fragmentation (and frequently overlap) of responsibilities can lead to “too many cooks in the kitchen”—and will add unnecessary fuzziness to the implementation of an enterprise CRM program. It's essential that ownership, roles, and responsibilities are clearly defined and agreed upon, and all involved can hold each other accountable throughout the process.
- **Establish mutually agreed upon success measures:** For me, this stated most simply is agreeing on the meaning of done, and is essential in ensuring everyone across functions has the same end goal in mind. This is also where internal friction often occurs because people think differently, and in the context of a technology implementation one individual may consider something complete or a success if a feature is simply enabled. But for others a platform being “live” or a feature being available is different than it being usable, useful, and delivering value. Without alignment, one department may consider the implementation a success while another has ongoing unmet expectations.
- **Ensure commitment of required resources and support:** Take time upfront to do your due diligence and understand not just the cost of the technology, but the full cost and commitment associated with implementation, integration, support, and ongoing management of the CRM platform. Depending on your chosen solution these costs can be substantial, and the skill sets required may be in high demand and challenging to recruit and retain. As we found, these staffing challenges can lead to scope adjustments/

reductions, missed milestones and stretched timelines, and growing internal disillusionment for CRM.

- **Set realistic expectations:** Technology is not a silver bullet, and CRM on its own cannot overcome underlying data, process, or integration challenges. Going into an implementation with unrealistic expectations can lead to frustration, disappointment, and even failure.

Fully implementing the technology to support our CRM strategy has been a long journey filled with challenges that have stretched our timeline. And this has opened the door for new entrants who have the potential to further advance our strategy, but also to introduce new complexities. This includes our EHR vendor, a company who has recently started to expand into the CRM space. For some functional areas within our organization this expansion, while still a fairly immature CRM product, offers a compelling alternative worth pursuing.

- The core data set of patient records and encounters is embedded in the platform and doesn't require additional integration work.
- Including CRM components can be accomplished within an existing system that staff are already familiar with and which doesn't require jumping between systems.
- From an IT standpoint, it's expanding with a known and established vendor where there's already significant investment and support infrastructure.

There are clear advantages to CRM as part of our existing EHR platform, especially when considering campaigns to an established patient population. Even as a relatively new product there is a compelling business case when weighed against a more mature but more expensive platform which has yet to prove out the anticipated ROI. And we've started piloting this offering to determine where it can execute our strategy and where gaps remain. What this has shown us so far is while our CRM strategy remains consistent, we need to be flexible and evolve when it comes to the right mix of technology to help us deliver on our strategy.



The Future of CRM

Although it's impossible to predict how we might use CRM five years from now, we can anticipate further advancements in AI and machine learning, leading to more sophisticated, accurate, and powerful predictive analytics that assess current customer behaviors and forecast future trends with greater precision.

This revolution in data insight will enable marketing teams to create tailored and proactive engagement strategies geared to the individual customer and not to segments or personas.

Moreover, as the significance of omnichannel strategies grows, CRM platforms are expected to integrate more seamlessly with emerging communication channels, ensuring consistency and engagement in customer interactions. Real-time data processing could shift toward augmented reality interfaces, offering new, immersive customer experiences. Additionally, as data privacy concerns intensify, organizations must develop more robust ethical frameworks and transparent practices, leveraging blockchain and other secure technologies to protect customer information and maintain trust. These developments will drive CRM into a future where customer engagement is more powerful, safer, and highly personalized.

CRM Trends Headed into 2025

More immediately, as we look toward 2025 and beyond, several emerging trends in CRM strategy present opportunities for organizations seeking to enhance their customer interactions and encourage engagement and conversion:

- **Advancement of Artificial Intelligence (AI) and Machine Learning:** These technologies will revolutionize CRM by automating mundane tasks, providing predictive analytics, and enabling hyper-personalized customer experiences.
- **Omnichannel CRM Strategies:** Adopting these strategies will become imperative. They will allow seamless communication across various platforms and improve the cohesiveness of customer interactions.

- **Data Privacy and Ethical Data Use:** These aspects will be emphasized more, and CRM systems will adapt to ensure compliance and build customer trust.
- **Rise of Mobile CRM:** This trend will enable on-the-go access to customer data, facilitating instant decision-making and improved customer service.
- **Real-Time Analytics:** These analytics within CRM platforms will grow, providing businesses with tools to make swift, informed decisions and respond quickly to customer needs.

These trends will help reshape how organizations manage customer relationships and set a new standard for personalization, engagement, and conversion expectations.

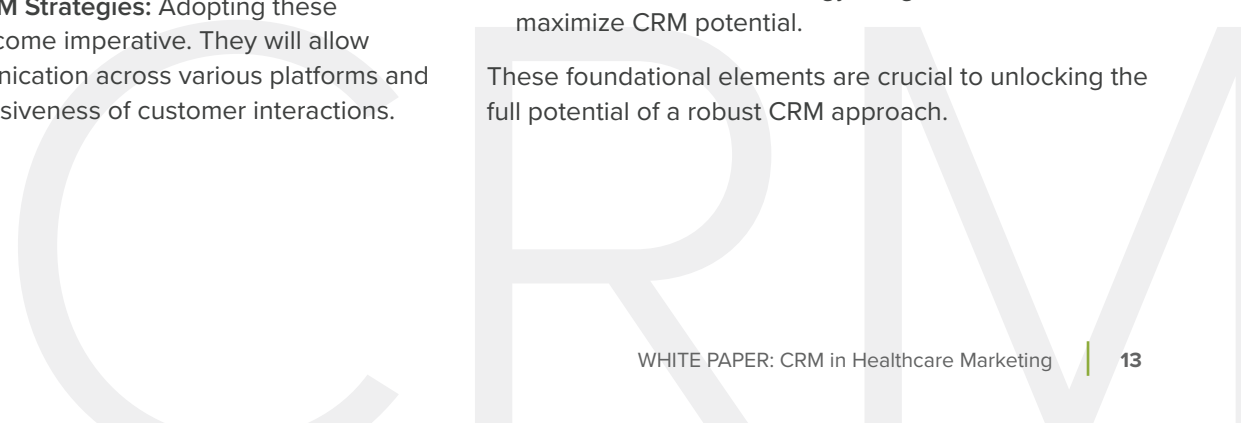
Summary and Key Takeaways

In conclusion, the success of any CRM strategy lies in an organization's ability to intertwine its strategic objectives with the technological capabilities CRM software provides. Businesses can foster stronger customer relationships and improve their market positioning by addressing specific challenges and recognizing the benefits.

As you consider developing and implementing your CRM strategy, it is vital to:

1. Align CRM strategy with strategic objectives and tech capabilities for success.
2. Enhance customer relationships and market positioning by tackling specific challenges.
3. Develop a customer-centric culture as a core element of your CRM strategy.
4. Utilize accurate data management to support effective CRM implementation.
5. Ensure seamless technology integration to maximize CRM potential.

These foundational elements are crucial to unlocking the full potential of a robust CRM approach.



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