GUIDE TO DRIVING GROWTH WITH PERSONALIZED WEBSITE CONTENT for Healthcare Marketers
TABLE OF CONTENTS

3  Introduction
6  Chapter 1: Is website personalization worth the effort?
10 Chapter 2: Is my organization ready?
14 Chapter 3: Developing a strategy
29 Chapter 4: Measuring performance
32 Summary
33 About Healthgrades
“Remember that a person’s name is, to that person, the sweetest and most important sound in any language.”

Dale Carnegie

How to Win Friends and Influence People
In the 1980s to early 1990s, the sitcom Cheers, set in a Boston bar of the same name, was all the rage on TV. People of a certain age probably still remember the theme song, which included these lines:

*Be glad there’s one place in the world where everybody knows your name, And they’re always glad you came; ...You want to go where everybody knows your name.*

*Song and lyrics by Judy Hart Angelo and Gary Portnoy*

It is human nature to want to be known and recognized. People want to be known by the businesses they use — not just as a number or a generic customer, but by name and preference. **They want to feel welcomed and valued.**

Personalization presents a unique opportunity for marketers to create consumer value, while simultaneously driving business results. So let’s start by clearly defining what website personalization means to hospital marketers and service line leaders.

The intent of web personalization is to guide consumers down a preferred path towards conversion. This is accomplished by using derived or known consumer data to present dynamic, relevant, and valuable health content and calls to action (CTAs) to website visitors. By crafting digital content strategies that are dynamic – that are “built to fit” a consumer’s unique health needs in real-time based on buying signals derived from their digital behavior – marketers serve not as advertisers, but as trusted advisors. In the era of healthcare consumerism, their job is to help consumers cut through the noise and clutter so they can conveniently connect with the best providers and services for them.
Personalization is nothing new in mainstream marketing

According to MarketingProfs, businesses that personalize web experiences see an average 19% increase in sales. In another study of customer insights and marketing professionals across multiple industries, almost all of the study respondents (94%) ranked personalization as "important," "very important," or "extremely important" in carrying out their current marketing objectives.

Now, healthcare providers are experimenting with personalization to see if they can encourage a similar level of influence in people’s lives. By doing so, they are repurposing online retail innovations that consumers have become accustomed to and potentially revamping healthcare in the process.

In the following pages, we will build the business case for website personalization, in particular. We will illustrate how personalization can be used to improve the online consumer experience and drive business performance, describe what healthcare-specific website personalization looks like, and share strategies and tactics for implementing onsite personalization while tracking and measuring your efforts.
Is website personalization worth the effort?

The Digital Health Consumer Adoption report released in 2016 showed that 46% of consumers are now considered active digital health adopters, having used three or more categories of digital health tools (e.g., telemedicine, wearables). This percentage is up from only 19% in 2015.

State of consumer adoption
Number of digital health categories used by respondents [Source]
In the era of the “Always Accessible Customer” (or AAC), there is a growing gap between the expectations of tech-savvy consumers and the ability of healthcare organizations to meet them. The AAC is defined by Forrester as “a consumer that uses three connected devices every day, goes online multiple times a day, and does so from at least three different locations.” With the number of AACs rising to 48% of the population, up from 25% in 2010, learning how to successfully capture a consumer’s attention on the web is more important than ever.
Personalization solves the problem of relevance, and thereby increases conversions

Research demonstrates that consumers themselves actually prefer at least some degree of website personalization from brands. While the digital revolution has handed additional power to the consumer, including more information and more choice, it has also increased the complexity of decision-making. You can increase the relevance of your value proposition to your website visitor by speaking their language, matching their expectations, and addressing their unique fears, needs, and desires.

- A recent study from Janrain shows that almost three-quarters of online consumers dislike having content (offers, ads, promotions) surface that does not pertain to their interests. In fact, one-half to two-thirds of web visitors say they would leave the site, depending on the type of non-relevant content that was served up.

- Leads nurtured with targeted content produce a 20% increase in sales opportunities, (which, in healthcare, could translate to appointments booked). Also, “63% of consumers said they’d think more positively of a brand if it gave them content that was more valuable, interesting, or relevant.”

- The 2016 Publish or Perish analysis of 380 CMOs by Forbes found that marketers that deliver personalized web experiences are getting double digit returns in marketing performance and response.
Imagine being able to determine in real-time where your site visitors are physically located, what their health interests, needs, and preferences are, and what their propensity is for future interaction with your brand. In turn, imagine using that knowledge to help them understand exactly how the services you offer can help them and guiding them to the provider or service best suited to meet their needs.

Some people might find this kind of frequent insight into personal health matters to be slightly invasive. But remember, that’s how many consumers felt when Amazon and Google began to suggest products based on a digital consumer profile – all too often with amazing accuracy.

In this context, personalized healthcare websites raise intriguing possibilities. If, like online retailers, healthcare marketers can leverage digital content to influence people’s choices, they might achieve much more than a higher website ROI. They might grasp the holy grail of healthcare: behavior change.

The key is developing a strategy that translates broad market personalization tactics into healthcare’s complex world of disparate data and stringent regulations around privacy and compliance.
Is my organization ready?

Website personalization is not a light undertaking. Before your organization commits, you should determine whether or not it is the right strategy for your organization, at least at this time.

DO YOU HAVE:

- Consumer insights?
- Enough resources?
- Refinement process?
Here are three questions that will help you determine your organization’s consumer experience maturity and readiness:

**QUESTION 1:**

**Do you have enough insights about your consumers?**

*For marketing teams getting started with personalization, we recommend that you at least have fundamental audience segments in place. These might be larger cohorts at first, such as visitors researching a certain symptom, procedure, or service line. Cohorts can also be focused on visitor location, visitor device use, single visitor behaviors, or visitors coming from an ad campaign.*

Developing and supporting these cohorts requires access to three types of consumer data:

1. Data gathered in real-time based on digital behavior
2. Personal data stored in a CRM and marketing automation system
3. Analytically-derived data that combines demographic and behavioral data with predictive models to determine medical need and risk

If you haven’t categorized your most important visitor segments, or don’t have access to the necessary consumer data, you should focus your energies on segmentation and data accessibility first, before moving into personalization. Most organizations have plenty of data — it’s just a matter of integrating, exploring, and using that data effectively to power a personalized experience.
QUESTION 2: Do you have the resources to successfully implement personalization?

Personalization requires dedicated resources and effort to sustain all of your segments and personalized variations. To create a truly effective personalization strategy, you will need to systematize personalization and implement an ongoing process.

RESOURCE CHECKLIST

- Do you have a team in place that can manage a personalization strategy?
- Do you have a CMS that supports your website personalization strategy?
- Do you have an A/B testing tool that can help validate your personalization approach?
- Do you have resources to create content that will multiply as you increase your message granularity?

Even if you know which audiences are valuable, your organization may not have a scalable way to target specific messages to those audiences. If your content is locked up in a web content management system that is controlled by developers, or if visitor data is not available for targeting in real time, then you will need to look to replace your CMS and possibly upgrade or implement a CRM before personalization, at scale, becomes feasible.
QUESTION 3:
Do you have a process for refining your personalization ideas?

Your assumptions about your best audience segments and personas, and the best messaging for both, are nothing more than assumptions until they have been proven to move the needle.

UNTIL IT IS TESTED, PERSONALIZATION IS MERELY A HYPOTHESIS.
Developing a strategy

From simple message segmentation to individual-level website customization, the combination of unified consumer data (CRM) and CMS technology is transforming the possibilities of personalization. At the same time, the rise of personalization tools and popularity has led to a rise in marketers doing personalization the wrong way.
Here are some of the common personalization mistakes we’ve seen:

• Poor consumer audience insights with little data analysis

• Ad hoc implementation of available features without understanding what need they are solving

• Lack of rigorous process to hypothesize, test, validate, and fine-tune personalization ideas

• Lack of resources to produce the content variations needed to support multiple, personalized target segments

A great personalization strategy begins with having a rigorous process that allows for:

• Gathering insights about your consumers

• Validating those insights through testing and performance measurement

• Optimizing content over time to improve conversions and other performance metrics

Without a strategy, even the best tools can fail to deliver the promised results.
Chapter 3: Developing a strategy

If this whole thing is starting to feel a little overwhelming, don’t worry. It is complex, but that’s why you prioritize. Even with a high-functioning team and advanced tools, it’s impossible to personalize for all of your audience segments simultaneously. So, where do you start?

You start with your annual plan. What are your most important performance metrics? Outlined growth objectives? What are your highest value conversion points? Personalization should be tied to the goals for which marketing is accountable and to your organization’s growth and service goals.

DEVELOP AN AUDIENCE-CENTRIC APPROACH

Developing a personalization strategy requires an audience-centric approach focused on business drivers.

ANNUAL MARKETING PLAN

<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>More Website</td>
<td>12%</td>
</tr>
<tr>
<td>• Traffic</td>
<td>3%</td>
</tr>
<tr>
<td>• On page time</td>
<td></td>
</tr>
<tr>
<td>• Conversion</td>
<td>20%</td>
</tr>
</tbody>
</table>

Example of growth objective

Example of Top Conversion points
DEVELOP AN AUDIENCE-CENTRIC APPROACH

Create segments

In the context of website personalization, segmentation involves putting a framework in place to deliver appropriate messages to audiences with “distinct needs and expectations.” While there are tools that will target minute, statistically insignificant segments based on small data hints and guesses, that can be completely overwhelming and, frankly, not worth the effort when it comes to optimizing conversions.

Once you believe you have identified the most important segments for your organization, then you can begin to layer on more tactical segments. These are typically qualified “personas” that inform your content strategy and design.
Chapter 3: Developing a strategy

DEVELOP AN AUDIENCE-CENTRIC APPROACH

Create consumer personas

A consumer persona is a single fictional person and set of characteristics developed from demographic data, psychographic segmentation, and other data that is representative of real people. The persona represents statistical characteristics of a desired population. Creating personas that accurately portray members of your target audience greatly improves your ability to create connections and establish relationships with actual and potential patients.

In order to prevent medication errors, physicians and nurses are taught the "5 rights" for administering medications – the right patient, the right medication, the right dose, the right route, and the right time. Healthcare marketing personalization also has its "rights" – serving up the right content at the right time to the right person leading to the right service line offering. You don’t want to offend or annoy your target audience; your goal is to increase their satisfaction and meet their needs.

When developing personas for personalization, it’s helpful to develop a composite sketch of your target prospect, identifying their real needs and concerns, and what interests them about your providers or services. This work is based on interviews with real consumers. Once you can identify how your consumers make healthcare decisions, you can reveal opportunities to create content that anticipates their questions and needs and helps guide them down a preferred path.
DEVELOP AN AUDIENCE-CENTRIC APPROACH

Various templates exist for creating patient personas. You may even use different templates to create different types of personas.

Persona templates can include the following:

- **Demographics:** Age range, sex, level of education, family situation, place of residence, etc.
- **Lifestyle factors:** Family status, profession, job status, average daily schedule, work commute, etc. These can help you better understand the patient’s psychology and how their life works.
- **Pain points:** Factors such as dealing with a chronic illness, financial worries, or dealing with health insurance (or no health insurance) can affect the patient’s journey.
- **Needs:** What services do you offer that can help this patient? Is there a particular service or department that specializes in the kind of care this patient needs? Which of this patient’s pain points can you help with?
- **Values:** What is this person looking for? Do they simply want their health issue addressed quickly? Is the best available specialist a concern?
- **Information sources:** Where would this person go for health information? Friends and family referrals? Online sources, and if so, what online sources? Social media?
- **Experience:** What type of experience is this consumer seeking? A Ritz-Carlton experience or Holiday Inn?
- **Most common objections:** What would prevent this consumer from coming to your healthcare organization? What would make this person choose a competitor over you?
Sample persona

Background:
- College graduate - bachelors and masters degrees in accounting
- CPA for 30 years
- Founder partner with his wife (also a CPA) in local CPA firm that employs a total of 10 people
- High school and college athlete. Played football and baseball in high school and had a football scholarship to college, where he dealt with knee injuries including a torn ACL.
- Active in college alumni association, various non-profits and charities
- During the fall, Bob travels to see his college football team play as often as possible
- Member of AICPA; speaker for educational accounting presentations at local and state level
- Remains physically active. Spends time on most weekends and occasionally during the week playing golf or tennis. Bob and his wife also try to walk together as often as possible, either during lunchtime at work or after dinner.
- Enjoys family vacations, which usually include activities such as hiking, golf, and tennis
- Attends Sunday School and church on most Sundays
- In relatively good health, except for occasional joint pain; knee pain is increasing in frequency and severity.

Demographics:
- Age 56
- Married, 3 adult children, 1 grandchild
- Homeowner: Single-family home in established upper-class neighborhood, Now that the youngest child has finished college, is considering downsizing to a smaller home in the next few years.
- Household income: $250,000 annually (combined husband-wife income). Now that their youngest child has finished college, Bob and his wife are working on maximizing contributions to their retirement funds in order to retire within the next 5 years.
- Lives on the outskirts of a large suburb of a large city. Office is located a few miles away from home.

Identifiers:
- In casual settings, often wears apparel with colors/logo of his college alma mater.
- Somewhat of a foodie and oenophile, as he and his wife enjoy trying out new restaurants, wine tastings, and cooking at home.

Bob
Knee Replacement Candidate
DEVELOP AN AUDIENCE-CENTRIC APPROACH

Identify available sources of data

One of the greatest challenges healthcare organizations face in implementing a website personalization strategy is that they have an over-abundance of non-actionable consumer data that is siloed in different systems. While basic personalization can be done by targeting visitors in real-time based on the actions they take on your site (browsing content on knee pain, searching for physicians in Location A, watching videos about a surgical procedure, etc.), deep 1:1 personalization only becomes possible with access to dynamic consumer profiles (past behavior, stated preferences, etc.). Advanced healthcare CRM technology can help marketers directly resolve this challenge.
Chapter 3: Developing a strategy

DEVELOP AN AUDIENCE-CENTRIC APPROACH

Below are the four main categories of data that are required to personalize most web experiences.

Ambient data
- Geography
- Devices
- Browser

Behavior data
- Searches conducted
- Pages visited
- Information viewed
- Content downloaded
- Event registrations
- Forms completed

For ambient data, let’s consider the time of day a web visit takes place and how this information might be used to promote services such as primary care, urgent care, and emergency services. Visitors during daytime (business) hours may be considered to be “at work” visitors, while those visiting after business hours may be considered “at home” visitors. So, visitors to the site during business hours will see a Primary Care CTA. Between the hours of 5pm to 9pm, visitors will see an Urgent Care CTA. Visitors between 9pm and 8am will see an Emergency Department CTA.
Chapter 3: Developing a strategy

Using integrated data for personalization is the pinnacle of personalized marketing. When you can combine data from your CRM that lets you understand how things like your consumer’s health literacy, median income, and family status affect their choices with marketing data that tracks which campaigns brought them into your site or system, your content suddenly becomes more relevant to that specific person and thus more valuable.

If you have a consumer with high health literacy but low family support who came to your website after completing a heart HRA from Facebook, you can promote your coordinated care services so they understand they’re not alone if they choose to come to your facility and providers for cardiac care.

To continue from the previous example, maybe you learned from a box checked on the women’s services form your consumer completed that they are also interested in pediatric services, so you can customize landing page banners the next time that consumer visits your site to show ads for both your new birthing center and your offsite pediatric groups affiliated with your hospital.

**User-provided data**
- Form data
- Social authentication data

**System-integrated data**
- CRM system data
- Marketing automation system data
- Legacy application data

Using integrated data for personalization is the pinnacle of personalized marketing. When you can combine data from your CRM that lets you understand how things like your consumer’s health literacy, median income, and family status affect their choices with marketing data that tracks which campaigns brought them into your site or system, your content suddenly becomes more relevant to that specific person and thus more valuable.

If you have a consumer with high health literacy but low family support who came to your website after completing a heart HRA from Facebook, you can promote your coordinated care services so they understand they’re not alone if they choose to come to your facility and providers for cardiac care.
Content strategy and ideation

One of the questions we hear most often when it comes to personalization is, “How do I get ideas for customized messaging that will work?” This is the biggest area of ongoing work and your biggest opportunity to improve conversion from personalization.

For example, say these are your top three goals:

- Grow cardiology service line revenue
- Increase bariatric procedures and
- Acquire new movers or the newly insured

Your hypotheses for personalization might be to use targeted content to move one segment of site visitors to take an online heart health risk assessment, others to register for a bariatrics seminar, and another segment of visitors to schedule a same-day primary care appointment.
The quality of your insights about your consumers directly impacts the quality of your personalization results

For example, two marketers could look at the exact same audience segment – New Movers – and arrive at two different hypotheses about how to improve conversions in this group.

- **Theory one:** Reduce distractions and add clarity around same-day appointments
- **Theory two:** Promote multiple services at once to cast a wide net of appeal

Upon implementation, you may discover that New Movers that are employed and commercially insured respond best to same-day appointments, while New Movers of advanced age convert most on other promoted services. In response, you would split this audience into two segments and promote the appropriate content to each.

**Location near me language changes to:**
- Primary Care locations
- Urgent Care locations
- Emergency Department locations
This is why you must always think of personalization in the context of the bigger picture of marketing optimization. Insights gained from A/B testing will inform your future audience segments and personalized messaging, while insights derived from personalization experimentation informs future A/B testing hypotheses, and so on.

**Personalization of website interactions may include:**

**Self-selected personalization:** Self-selected personalization is potentially the easiest strategy to conceptualize and implement. With this strategy, you ask your consumers to self-identify and segment themselves, based on their own interests. This triggers more relevant content and offers based on how users describe themselves.

For example, say you want to implement a personalization strategy focused on congestive heart failure. You could implement a pop-up that asked visitors to your CHF landing page to choose from the following:

- “I am concerned I have heart failure.”
- “I manage the disease while I’m working.”
- “I want to work at a hospital that treats this disease.”
- “I have recently been diagnosed with heart failure.”
- “I’m a physician treating the disease.”
- “I have late stage disease.”
Personalization of website interactions may include:

**Location-based personalization:** If your organization has multiple facilities in various locations, you can improve a web visitor’s experience by serving up information on services that are most convenient to the user. Contemporary CMS systems are capable of detecting a user’s location using the IP address, or this can be implemented much like self-selected personalization, using a pop-up that asks the site visitor to identify where they are geographically located.

Promote the closest Urgent Care Center or Emergency Department on the home page

Promote a specific practice/location/center of excellence on interior pages or in a banner or message based on user activity and location

Pre-select/display preference for location based on user geo-location

**Service line-specific messaging and images:** Promote Orthopedics or Sports Medicine to someone who has indicated an interest in related content or related terms; promote specific services, physicians, classes, outcomes, quality, and educational content.
Personalization of website interactions may include:

**Variable content**
This refers to creating dynamic zones of content on a web page designated to change out based on the web visitor. One way to accomplish this is showing content based on the detected geographic location of the web visitor. Your organization could promote a new primary care facility in County A to web visitors from that county while promoting orthopedic services to visitors from County B, where your orthopedic surgical facility is located.

**Related content**
Personalization with related content is what Amazon does when they serve you up a list of suggested purchases based on your previous purchases and browsing history — cross-promoting related/additional products or services. In a healthcare setting, a web visitor who scheduled an appointment online with an obstetrician could be shown articles on choosing a pediatrician for newborns or promotions for your labor and delivery services.

**Calls-to-Action (CTAs)**
These can deliver a high ROI when behavioral data is used for personalization. If a consumer views or downloads a piece titled “How to Know if You’re a Good Candidate for Knee Surgery,” that should trigger your site to display automatic CTAs for events like upcoming classes on knee problems or a CTA to schedule an appointment with a knee specialist. Related services such as physical therapy and low-impact exercise classes could also be included in the CTAs.
You’ve done all this work to implement your personalization strategy and everything is up and running. **Now what?**

Measuring results and tracking performance is key to validating your personalization strategy. In order to effectively measure performance, there must be benchmarks set and goals established at the beginning against which performance can be measured.

Your specific goals will influence the types of tracking and measurement to be used, but tracking visits and conversions is a good place to start.
Testing performance of a campaign or piece of content will help you learn more about your consumers and can help you make more informed choices in the future for even better performance as you go along.

*Not every personalized experience will resonate, so it’s important to always understand how these experiences are performing and adjust accordingly.*

**A/B Testing**

Simply put, A/B testing is the idea of comparing one content element against a second variation of that element, with every other element on the page staying the same. Running an A/B test that directly compares a variation against a current experience lets you ask focused questions about changes to your website or app and then collect data about the impact of that change.

A/B testing allows individuals, teams, and organizations to construct hypotheses, and to learn better why certain elements of their experiences impact user behavior.

The options for what you can A/B test are nearly limitless. Some of the most common elements include:

- **Headlines** on banners, landing pages, ads, etc.
- **Images.** Does a color image perform better than black-and-white?
- **Layout.** Simple design changes based on user experience design can make a big impact.
- **Ad copy.** By testing ad copy, marketers can learn which version attracts more clicks.
- **Buttons.** Wording, color, placement, and more can all be tested.
- **Page layout.** Does placing an ad, form, or other piece of content above the fold or on the right or left side of the screen make a difference?
A/B TESTING BEST PRACTICES

- Testing just that one element at a time is key to understanding what makes one variation perform better than another. Therefore, you’ll need to carefully plan and time changes if you intend to eventually test more than one element of a particular piece of content or campaign.
- Continually testing elements over time helps you learn about your audience’s preferences.
- Split test your audience based on size as well as split test individual campaigns.
- Document and track your results to help you learn and to inform future decisions.

For example, an organization might want to increase the number of completed bariatric event registrations. To accomplish this, they may A/B test:

- Homepage promotions
- Recommended content delivered via banner ads
- Registration form

Say banner ads win the day in terms of clicks. They’ll then want to test multiple versions of the form to continue to move the needle on conversions.

The ultimate goal is, of course, measurable ROI in terms of revenue. Good data analytics can help you determine which of your efforts actually contributed to downstream results. When you can track and measure strategic marketing efforts all the way to booked appointments and billing, you can show real success. Document a benchmark before you begin your personalization efforts, implement your plan, and optimize as you go based on what you learn and then watch as you make progress toward your goals.

Don’t assume that insights gained during personalization testing are only valid for one segment. These wins may be overall wins.
There you have it...

Personalizing your hospital website may seem like a daunting task, especially if the concept is brand new for your organization. But the good news is you don’t have to implement every strategy, across the board, at the same time.

Start with one service line or facility where you want to grow the business. Create your persona or personas and journeys for that specific specialty or place. Pick one element of personalization, like a home page banner, to test with, and as you begin to see results, expand your efforts to other elements or parts of your organization.

The key to success in personalization is to implement it only when it ties back to a specific marketing objective, and to increase relevance to optimize conversions.

If you put in the effort to really understand and relate to your audience, to know what services, content, and offers are actually valuable to them, they will recognize the relevance and respond. They will feel like you “know their name.” It’s human nature.
Healthgrades empowers meaningful connections between people and healthcare providers. At healthgrades.com, we help millions of consumers to find and schedule appointments with their provider of choice. With our scheduling solutions, CRM, advanced analytics applications, and omnichannel communications services, we help more than 1500 hospitals cultivate consumer relationships, improve access, and build patient loyalty.