Customer Relationship Management:

Making the Most of Your CRM Investment

March 28-29, 2017

The Catalyst Ranch
Chicago, Illinois

A Healthcare MarTech Workshop from:

CORRIGAN
CONSULTING

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greystone.net

#hccrm17

Overview of the Workshop

Customer Relationship Management (CRM) is a game-changing technology with the potential to transform healthcare marketing. With CRM you can more effectively focus marketing investments on the right customers, lower the expense of patient acquisition, create loyal brand advocates and track return on investment.

The bottom line is . . . CRM is good for the bottom line.

Yet many health systems report that CRM investments are not achieving expectations. How this happens when so much time, effort and dollars are invested in the evaluation, selection and implementation of CRM, leaves marketing executives scratching their heads.

The successful launch of CRM isn't rocket science, but it does require a purposeful approach to:

- gain C-suite endorsement to engage IT, Finance and other key business functions
- make significant changes to the marketing department structure, marketing processes and team member skills sets
- develop the right CRM solution and vendor partner who can support your health system's needs.

Learn How to Optimize CRM Performance

Whether you are muddled in the throes of selection and implementation or aren't getting the results you hoped for or want to take CRM performance to the next level, this workshop is for you. Over 1½ days, you'll participate in educational sessions, facilitated discussions and open dialogue on:

- Crafting and articulating the vision, strategy and business case for CRM
- Connecting CRM to marketing planning and programming
- Integrating CRM, CMS and marketing automation
- Leveraging data analytics and customer insights to improve ROI
- Building internal partnerships and support for CRM investments
- Evolving the marketing department structure, capabilities, staffing and skill sets to support CRM
- Successful healthcare CRM case studies and ideas
- Optimizing CRM performance, reporting and ROI
- And much more . . .

Conference Faculty

Workshop Faculty and Participants

Healthcare marketing executives will share their CRM journeys, providing insights into the trials and successes of their CRM programs. The expert marketing and digital strategists of Corrigan Consulting and Greystone.Net will facilitate the deep dive workshop.

In order to provide an intimate venue for open discussion and sharing of CRM expectations and experiences, space will be limited to 30 health system (non-vendor) participants. Participants will leave with information and tools to support successful CRM operations, build effective vendor relationships and optimize performance of their CRM program.

Kathy Divis
President and Co-Founder
Greystone.Net
Atlanta, GA

Michael Schneider
Vice President and Co-Founder
Greystone.Net
Atlanta, GA

Karen Corrigan
CEO
Corrigan Consulting
Norfolk, VA

Brian Whitman
Partner
Corrigan Consulting
Norfolk, VA

Carla Bryant
Partner
Corrigan Consulting
Norfolk, VA

Conference Faculty

Simon Yohe
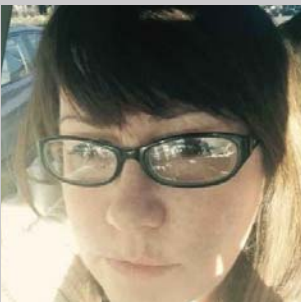Director of Digital for Orlando
Health
Orlando, FL

Rob Klein
Founder & CEO
Klein & Partners
Orland Park, IL

Megan Yore
Chief Communications Officer
& Director of Marketing
Lakeland Health
St. Joseph, MI

Mallory Laur
Senior Engagement Strategist
Shawnee Mission Health
Merriam, KS

Robin Ward
Director Customer
Engagement & Marketing
Analytics
University of Pennsylvania
Health System
Philadelphia, PA

Tanya Andreadis
Chief Marketing Officer,
Digital Strategy and Analytics
University of Pennsylvania
Health System
Philadelphia, PA

**Sign up at www.greystone.net/CRM
or call 404-407-7670**

CRM Workshop Agenda

Time	Topic

8:30 am — **Welcome, Breakfast and Introductions**

9:00 am — **CRM and the Journey from MarCom to MarTech**

Technology is the engine that drives the modern marketing discipline. It is where science and art converge to deliver an evidence-based approach to true customer engagement. Customer Relationship Management (CRM) is a central component of the marketing technology infrastructure, a critical tool that enables today's marketers to drive value creation along the whole spectrum of the customer journey. In this opening discussion, we'll address the critical role of CRM in today's marketing environment as well as future applications and opportunities.

Presenters:
Karen Corrigan, Corrigan Consulting
Kathy Divis, Greystone.Net
Rob Klein, Founder & CEO Klein & Partners

10:00 am — **Break**

10:15 am — **The Big Picture: Making the Business Case for CRM**

The potential of CRM is compelling: increased sales, lower customer acquisition costs and greater customer engagement. Whether you're new to CRM or want to take performance to the next level, this session will help you set (or reset) expectations for the business value of CRM and articulate a clear business case to gain executive support for the investments required to optimize CRM in your organization.

We'll explore key questions to help you clarify your overall vision and plan for CRM: What functionalities do you need in a CRM system? Are you looking for real-time customer intelligence to make marketing campaigns more effective? Do you want to automate marketing processes to improve efficiencies? Drive consumers to information and resources to improve health outcomes? What are your expectations for ROI?

Presenters:
Megan Yore, Lakeland Health
Carla Bryant, Corrigan Consulting

11:00 am — **Strategic Applications: Connecting CRM to the Marketing Plan**

Once you've established the business case, it's time to take those big picture goals and focus on how CRM is connected to marketing planning and programming priorities. Building on the foundation of the overall plan for CRM, these priorities focus on specific applications, processes process and functionalities to achieve results.

Presenters:
Mallory Laur, Shawnee Mission Health
Kathy Divis, Greystone.Net

12:00 pm — **Networking Lunch**

CRM Workshop Agenda

Time	Topic
1:00 pm	**Building the Ecosystem: Integrating CRM, CMS & Marketing Automation** Are your web, digital, CRM, call center and direct marketing programs performing like stand alone systems? We'll explore the trends, opportunities and challenges of optimizing CRM performance through integrated systems and processes, and discuss an overall framework and plan of action for bringing these functions together to improve marketing and sales productivity. **Presenters:** **Simon Yohe, Orlando Health** **Mike Schneider, Greystone.Net**
2:15 pm	**Break**
2:30 pm	**Leveraging CRM Data Analytics and Customer Insights to Drive Strategy** CRM systems can integrate data from many sources to transform customer information into valuable customer insights, helping marketers identify high value segments, better understand trended behaviors, and laser focus marketing strategies and investments. Leveraging data analytics and customer insights can improve customer experience, lead to predictive modeling and calculate return on marketing investment. In this session, we'll discuss how healthcare marketers can turn data into insights, how to apply those insights to drive marketing strategy and enhance customer experience, as well as how to organize and build data analytics capabilities. **Presenters:** **Brian Whitman, Corrigan Consulting** **Tanya Andreadis, Penn Medicine** **Robin Ward, Penn Medicine**
3:45 pm	**Ideas into Action: Key Insights from Today's Session** Wrap up Day One with a quick roundtable discussion to record critical insights, capture ideas, address unanswered questions and prep for Day Two. **Facilitator** **Karen Corrigan**
5:30 pm	**Vendor Showcase Reception & Networking** Join us for networking, cocktails, light fare and a chance to learn more about various CRM vendors, software solutions and other services to enhance your CRM and digital marketing programs.

CRM Workshop Agenda

Time	Topic
8:00 am	**Networking Breakfast**
8:30 am	**Winning CRM Strategies: Learning from Your Peers** CRM can be a catalyst for transforming marketing performance. Learn from leading marketing executives who are redefining healthcare marketing as we know it by using customer intelligence, marketing automation and service innovations to drive strategy, increase real-time customer engagement and realize ROI. Through case studies and interactive discussion, you'll find ideas that can be put into action immediately. **Moderator:** **Kathy Divis, Greystone.Net**
10:30 am	**Break**
10:45 am	**Nuts and Bolts: Internal Partnerships, Structure, Staffing, Skills and Resources** Effective implementation and management of your health system's CRM initiative requires a professional, comprehensive approach to gain support from internal stakeholders (including marketing, IT and finance), integrate diverse systems, migrate and mine data, develop the right structure for marketing department, train the marketing team, and hardwire customer acquisition and retention processes. Working in small groups, this interactive breakout session will address the roles of various internal stakeholders, as well as the structural, skill and resource requirements of a successful CRM operation. **Facilitator:** **Karen Corrigan, Corrigan Consulting**
12:00 am	**Working Lunch: Small Group Discussions and Reports** Once you've established the business case, it's time to take those big picture goals and focus on how CRM is connected to marketing planning and programming priorities. Building on the foundation of the overall plan for CRM, these priorities focus on specific applications, processes process and functionalities to achieve results. **Facilitator:** **Mike Schneider, Greystone.Net**
1:00 pm	**Ideas Into Action: Aiming for Success** What actions will you take in the next 10 days? What wheels can you set in motion in the next month? Leave with an action plan.
1:30 pm	Adjourn

Lodging and Session Logistics

Hotel Monaco • 225 North Wabash Avenue, Chicago, Illinois 60601 • 312.960.8500
www.monaco-chicago.com

Hotel rooms are available March 28-29, 2017 at the Hotel Monaco. The group rate is $149/night. **Please make room reservations prior to February 24, 2017**. To reserve your room, call 1-800-KIMPTON (1-800-546-7866) and ask for the **CRM Workshop** group rate.

Catalyst Ranch • 656 W. Randolph Street, Suite 3W, Chicago, Illinois 60661 • 312.207.2720
www.catalystranchmeetings.com

The workshop will be held at the Catalyst Ranch. Located in a historic downtown Chicago loft, the Ranch provides a unique environment that stimulates and invigorates the senses, enabling individuals to think differently and approach problems from a new viewpoint. They have hosted numerous innovative clients, including Procter & Gamble, Google, Kraft Foods, Dyson and many more.

Registration

Registration Fee:	Before February 24, 2017	After February 24, 2017
	$795	$895

Visit www.greystone.net/CRM to Register

Special Needs
If you need assistance with special arrangements such as dietary restrictions or accessibility, call 770-407-7670.

Confirmation of Registration
All registrations will be confirmed within ten business days of receipt of the registration form and payment. If you do not receive a confirmation, please call 770-407-7670. Please do not mail or fax forms without payment.

About Corrigan Consulting LLC

Corrigan Consulting is a management consultancy specializing in strategic, evidence-based marketing, business development and consumer engagement strategies to drive growth, strengthen competitive performance and improve business outcomes. Our expert consultants work closely with healthcare leaders to discover market opportunities, develop actionable growth strategies, create competitive brands, acquire and retain high value customers, improve marketing performance, and build critical technology, analytical and digital marketing capabilities.

We've facilitated the transformation of marketing departments in health systems across the U.S. The Corrigan Consulting team combines C-suite experience with deep expertise in strategic, analytical and digital marketing capabilities to help health system leaders embrace the science of marketing, gain deeper insights into the needs and motivations of healthcare consumers, and equip marketing teams with the technology, capabilities and resources to drive engagement and ROI.

Learn more at www.corriganpartners.com.

About Greystone.Net

Greystone.Net began in 1996 with a vision of how the Internet could transform the way healthcare organizations interact with patients and consumers. Based in Atlanta, Greystone serves hospitals of all sizes, health systems, academic medical centers and health plans nationwide. The firm's focus is exclusively on healthcare and is the result of many years of experience in senior level healthcare planning, marketing, administrative and information services positions.

Greystone understands the challenges facing your healthcare organization and is adept at leveraging Web technology, strategic thinking and digital marketing to provide solutions. These solutions can enhance the healthcare experience for patients, physicians, employees and other consumers while helping to generate revenue and increase return on investment through your digital footprint. Greystone offers a comprehensive array of services to effectively manage a health system's quickly evolving and ever-growing digital ecosystem.

To learn more, visit: www.greystone.net.

For More Information

Call us at 770-407-7670 or email us at info@greystone.net

CRM Workshop Vendor Showcase

evariant®
MOVING HEALTHCARE AHEAD®

Evariant sees a future where healthcare organizations deliver precise, efficient care solutions not only inside an organization's walls, but also beyond. We make this a reality by continuously innovating a healthcare CRM platform – a platform based on a centralized healthcare data hub, analytics, and communications engine - capable of identifying, executing, and measuring all types of engagement initiatives. The result is greater visibility into opportunities, richer engagement with key constituents, and continuous measurement and improvement. Many of the leading healthcare institutions have selected our solutions to optimize their care strategies and related initiatives.

healthgrades®

Healthgrades provides hospitals strategic and scalable growth, engagement and quality solutions. Our CRM, PRM and digital services, including our unique Patient Direct Connect program and multichannel techniques, are enhanced by strategic experts with evidence-based insights. We help hospitals engage consumers and physicians so they can improve outcomes and achieve measurable results.

LionShare®

Since 1995, LionShare has guided healthcare organizations in the quest to link data to decision insights, execute automated marketing campaigns and drive better outcomes across the healthcare continuum. Whether you are a Data Scientist, Strategist or Marketer, DIATA® – our Business Intelligence and CRM/PRM platform-will help you grow healthy relationships with patients, prospective patients and physicians in your community.

tea leaves health
AN everydayHEALTHinc™ COMPANY

Tea Leaves Health combines a deep understanding of healthcare business development with the technical savvy to deliver strategic success for healthcare organizations of any size. Our proprietary Decisionology™, Physicianology™ and Patientology™ software tools easily transform internal and external data into immediately actionable information for multiple leadership levels.