

CRM Workshop

Making the Most of Your
CRM Investment

A Healthcare MarTech
Workshop from:

CORRIGAN
CONSULTING ■■■



greystone.net

September 11-12, 2017
**AC Hotel by
Marriott Portland
Downtown**
Portland, OR

#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
- Leveraging CRM in a multi-hospital environment
- 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.



Carla Bryant

Executive Vice President
Corrigan Consulting
Norfolk, VA



Michael Schneider

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



Brian Whitman

President
Corrigan Consulting
Norfolk, VA

Conference Faculty



Simon Yohe
Director, Web Marketing
Strategy, Adventist Health
System
Altamonte Springs, FL



Mallory Laur
Senior Engagement Strategist
Shawnee Mission Health
Merriam, KS



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



Kate Huey,
Senior Director Marketing
Research and Analytics,
Providence Health & Services
Renton, WA



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

CRM Workshop Agenda

Day One: Monday September 11, 2017

Time

Topic

12:30 pm

Welcome, Breakfast and Introductions

Welcome to Portland! Grab lunch either before you get to the Workshop, or bring a sandwich or salad into the Workshop room with you, as we welcome the attendees and faculty, set the stage for the next two days and get acquainted. Come prepared to tell us a little about the state of your organization's CRM journey.

Moderated by:

Brian Whitman, Corrigan Consulting

1:00 pm

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 stack, a critical tool that enables today's marketers to drive value creation along the whole spectrum of the customer journey. In this opening session, learn about the critical role of CRM in today's marketing environment, discuss emerging opportunities and applications, and get a sneak peek at the latest trends and news from the soon-to-be released 2017 State of Digital Marketing in Healthcare survey.

Moderated by:

Mike Schneider, Greystone.Net

Carla Bryant, Corrigan Consulting

2:00 pm

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.

In this session, explore key questions to help you clarify an overall vision, set rational goals and plan for CRM, such as:

- What functionalities do you need in a CRM system?
- How can you:
 - Use real-time customer intelligence to make marketing campaigns more effective?
 - 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

CRM Workshop Agenda

Day One: Monday September 11, 2017

Time	Topic
3:00 pm	Break
3:15 pm	Building the Ecosystem: Integrating CRM, CMS & Marketing Automation <p>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.</p> <p>Presenters: Simon Yohe, Adventist Health System Mike Schneider, Greystone.Net</p>
4:15 pm	Q&A and Vendor Introductions <p>In this last formal session of the day, participate in an open discussion with your colleagues and faculty on the topics from today, and then, sit back and enjoy a brief presentation (10 minutes max each) from representatives of the firms participating in this evening's Vendor Showcase. This session is designed to give you a quick introduction to each firm and their product offering that will help you decide what additional questions you might have for the vendors later during the reception.</p> <p>Moderated by: Brian Whitman, Corrigan Consulting</p>
5:30 pm	Vendor Showcase Reception & Networking <p>Join us for an early evening of 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. You'll still have plenty of time to head out for a nice dinner in downtown Portland after the Showcase!</p>



CRM Workshop Agenda

Day Two: Tuesday September 12, 2017

Time	Topic
8:00 am	Networking Breakfast
9:00 am	Strategic Applications: Connecting the CRM to the Marketing Plan <p>Once you've established the business case and have a framework for integrating CRM with the supporting infrastructure, it's time to focus on how CRM connects to your organization's marketing plan and programmatic priorities. In this session, hear how one organization builds the foundation of the overall CRM by tying it to the marketing plan's goals and priorities. Learn how these priorities are used in specific marketing applications, processes and functionalities to achieve the organization's desired results.</p> <p>Presenters: Mallory Laur, Shawnee Mission Health Mike Schneider, Greystone.Net</p>
10:00 am	Break
10:30 am	Leveraging CRM as an Enterprise Wide Solution <p>Providence Health & Services recently evaluated and implemented a CRM platform for the not-for-profit Catholic health care system operating multiple hospitals across 5 states. After evaluating several healthcare industry specific CRM platforms, Providence chose to implement a vendor solution that was non-healthcare industry specific. Learn about their journey from evaluation, decision, implementation and their early success for this enterprise wide CRM solution.</p> <p>Presenters: Kate Huey, Providence Health & Services Brian Whitman, Corrigan Consulting</p>
Noon	Networking Lunch
1:00 pm	Nuts and Bolts of a Successful Program: A Facilitated Discussion <p>Effective implementation and management of your health system's CRM initiative requires:</p> <ul style="list-style-type: none">• A professional, comprehensive approach that garners support from internal stakeholders (including marketing, IT and finance)• The integration of diverse systems• The ability to migrate and mine data• The development of the right structure for the marketing department• A training plan for the marketing team• The hardwiring of customer acquisition and retention processes. <p>In this facilitated discussion, identify the roles of various internal stakeholders, and learn how others have successfully structured their marketing department, teams and processes to achieve organizational goals and build a successful CRM operation.</p> <p>Facilitated by: Carla Bryant, Corrigan Consulting</p>

CRM Workshop Agenda

Day Two: Tuesday September 12, 2017

Time	Topic
2:30 pm	Break
2:45 pm	Learning about Winning CRM Strategies from your Peers: A Panel Discussion <p>CRM can be a catalyst for transforming marketing performance. Learn one last time from the faculty - leading marketing executives who are redefining healthcare marketing – on how to use customer intelligence, marketing automation and service innovation to drive strategy, increase real-time customer engagement and realize ROI. Through this interactive discussion, find ideas that can be put into action when you get back to the office. Use this closing opportunity with the faculty to pick their brain, ask those final nagging questions and takeaway a few more helpful hints to guide your continued CRM journey on a winning pathway.</p> <p>Facilitated by: Mike Schneider, Greystone.Net with all Faculty Memebers Participating</p>
4:15 pm	Wrap Up <p>What actions will you take in the next 10 days? What wheels can you set in motion in the next 30 day? Use this final time with your colleagues to create your own personal “CRM To Do List” for when you get back home. Travel safely home, thanks for attending and see you in 2018, if not before.</p> <p>Moderated by: Brian Whitman, Corrigan Consulting</p>
4:45 pm	Adjourn

Lodging

AC Hotel by Marriott Portland Downtown • 888 SW 3rd Ave, Portland, Oregon 97204 • 1-888-236-2427

Hotel rooms are available September 10-13, 2017 at the AC Hotel Portland Downtown. The group rate is \$199/night. **Please make room reservations prior to August 11, 2017.** To reserve your room, call 1-888-236-2427 to reserve a room and ask for the **CRM Workshop** group rate. Or [register online](#).

Ideally located in the heart of downtown, the AC Hotel by Marriott Portland Downtown blends contemporary style with cosmopolitan sophistication. Designed for the modern traveler who appreciates architecture and design, the hotel offers an elevated travel experience with a European soul and a modern mindset. From check-in to checkout, each element of the downtown retreat has been tailored to alleviate the stress of travel while immersing guests in Portland's vibrant culture, cuisine, and community. The hotel has been curated with inspiring works from local artists. The breakfast found European inspiration at the AC Kitchen, while room service is replaced with the tapas-style sharing plates and creative cocktails at the AC Lounge. The AC Store is even stocked with local food, wine, gin and of course, local coffee from Portland's own Water Avenue Coffee. The staff here are true urban spirits who are ready to share the unique buzz of the city and all it has to offer. By stripping away the unnecessary, we provide beauty in the essentials.



Registration

	Before August 11, 2017	After August 11, 2017
Registration Fee:	\$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
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CRM Workshop Vendor Showcase



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.



Influence Health provides the healthcare industry's most comprehensive suite of healthcare consumer experience solutions. The Influence Health platform enables provider organizations to positively influence consumer decision making and health behaviors well beyond the physical care setting through personalized and interactive multi-channel engagement. Since 1996, the Birmingham, AL-based company has helped more than 1,100 provider organizations positively influence consumer relationships in a way that is transformative to financial and quality outcomes.



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.