



2018

## **GETTING STARTED WITH MEDICAL LEAD NURTURING**

Using Automated Medical Lead Nurturing to increase lead conversion 50% and decrease costs 33%

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## Getting started with Lead Nurturing

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**'COMPANIES THAT  
EXCEL AT LEAD  
NURTURING  
GENERATE 50% MORE  
SALES READY LEADS  
AT 33% LOWER COST'**

**SOURCE: FORRESTER RESEARCH**

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Medical Marketers have a problem. Potential buyers have more choices and information about services than ever before. Using the Internet, consumers can find, research and select a medical service without any direct interaction with the medical practice.

By the time the buyer is ready to engage with sales staff, most of the purchase decision is made leaving little room for traditional sales strategies.

However, the mix of contacts generated by medical marketing is not limited to only sales-ready consumers. More than half are not yet ready to consider a purchase and do not respond to efforts to close the sale. However, industry trends show that almost 75% of those leads that are usually ignored and discarded are sales-ready within the next 12 to 24 months.

Lead nurturing is a critical strategy for targeting those leads who are not yet sales ready and creating a relationship of trust with them. This results in medical practices which nurture leads converting up to 50% more patients than before.



Nic Nevin

**Solution Architect**

**Influx MD Sales and Marketing Software**

**[www.influxmd.com](http://www.influxmd.com)**

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**'NURTURED LEADS  
EXPERIENCE A 23%  
SHORTER SALES  
CYCLE.**

**SOURCE: MARKET2LEAD**

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## Drip Marketing

Many medical marketers use autoresponders and drip marketing as part of their marketing toolbox. Because of this, discussions of lead nurturing occur with marketers making an incorrect association with drip marketing.

*Lead nurturing is not the same as  
drip marketing*

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Lead nurturing recognizes the different needs of leads depending on their position along the buyer's journey and, in advanced systems like Influx MD, based on individual profile information and preferences.

Drip campaigns are a one size fits all strategy that is unable to adjust to the changing needs of leads as they move along the buyer's journey. Lead nurturing delivers more personalization and responsiveness so that it remains relevant to the leads requirements throughout the sales cycle.

## What is Lead Nurturing?

Now that we know that lead nurturing is not the same as drip marketing, it's time to find out what lead nurturing campaigns are, and how they can help your medical practice.

Lead nurturing identifies leads who are not yet ready to buy and cultivates them over an extended period. The success of lead nurturing for medical practices recognizes that between 50% and 75% of the people contacting a clinic because of marketing are either not appropriate or not ready to become patients.

It further recognizes that while these leads are not currently candidates for a service, they represent latent demand that, if nurtured appropriately will convert to patients in the future.

Lead nurturing maintains appropriate contact with leads, building brand loyalty now and turning it into sales later.

Lead nurturing is not just a speculative process, however. It has a direct effect on sales opportunities already in the sales pipeline.

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**'NURTURED LEADS  
MAKE 47% LARGER  
PURCHASES THAN  
NON-NURTURED  
LEADS.'**

**SOURCE: THE ANNUITAS GROUP**

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**'ONLY 29% OF  
BRANDS NURTURE  
THEIR EXISTING  
CUSTOMERS BEYOND  
THE INITIAL  
PURCHASE'**

**SOURCE: DEMAND GEN**

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Businesses that nurture leads report buying cycles that are about 23% shorter than their counterparts that do not nurture leads. These nurturing businesses report fewer leads lost from the sales funnel and higher conversion at each stage in the sales workflow.

Lead nurturing does not need to end at the point of patient conversion. Post-purchase nurturing results in increased cross-sell and up-sell opportunities as well as improved reviews, referrals, and volunteer testimonials.

Lead nurturing is a perfect adjunct to standard medical marketing practices because its main focus is educating buyers along their journey. The long history most practices have with medical education positions them perfectly to take advantage of nurturing technology to increase practice revenue.



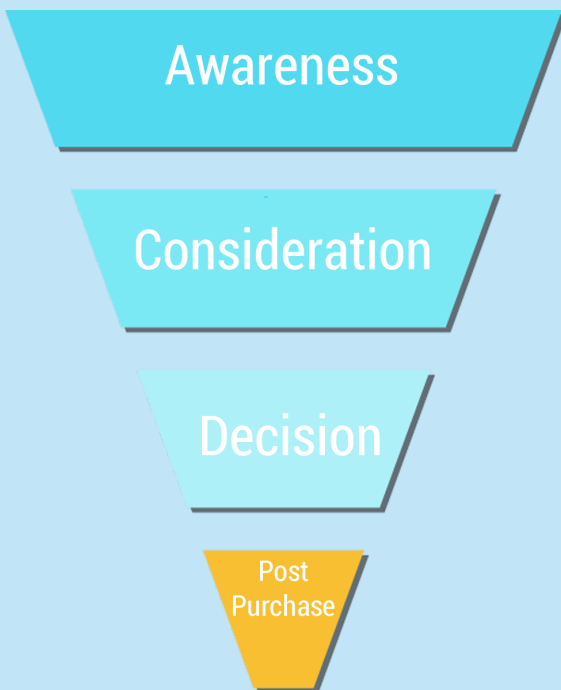
## The Buyer's Journey

Lead nurturing is about providing the right intervention to help the lead at each stage of the buyer's journey. So before we dive into creating a nurturing strategy, let's take a moment to review the buyer's journey stages so we can keep them uppermost in our minds as we develop our plan.

The customer or lead's experience navigating through the process of becoming your patient is called the buyer's journey. It spans the time from when a lead is first aware of their need for your service right through until they are a satisfied customer, ready and willing to promote your business to others.

If you have experience in sales and selling, you may be familiar with a similar journey called the sales cycle. This process defines the tasks involved in generating more sales revenue for an organization. It is concerned with the financial goals of an organization and what must be done to achieve these goals.

Lead nurturing is customer-centric. It focuses on the needs of the client first. To ensure the business success of our strategy, we measure it against goals established as part of the sales cycle, but these goals are not used to define tasks within the nurturing program.



*The buyer's Journey*

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**'LEAD NURTURING  
EMAILS GET 4-10X  
THE RESPONSE RATE  
COMPARED TO  
STANDALONE EMAIL  
BLASTS.'**

**SOURCE: DEMAND GEN REPORT**

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## Stages of the Buyer's Journey

### Awareness

Leads are unaware of your service and may not even realize that it solves a problem that they have. The awareness stage focuses on defining the extent of an issue and why it is a problem for the lead. During this time leads are interested only in light information without detail.

A lead in the awareness stage has low value to your clinic and is not responsive to direct marketing such as start now or contact now promotions.

### Consideration

At this stage, the lead is aware of the problem and is searching for options. They are open to comparison information and greater detail than they were during the awareness stage.

A lead in the consideration stage may respond to invitations for additional information such as downloads, webinars, community talks, or online seminars. These leads are still not sales-ready, so the nurturing goal for this stage is engagement. Emphasize information value and avoid overtly selling your program to this group.

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**ALIGNING CONTENT  
TO SPECIFIC STAGES  
IN THE BUYER'S  
JOURNEY YIELDS AN  
AVERAGE OF 73%  
HIGHER CONVERSION  
RATES VS CONTENT  
THAT ISN'T ALIGNED'**

**SOURCE: ABERDEEN**

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## Decision

The decision stage is the sales-ready stage where the lead is most likely to respond to calls to action requiring phone discussions or meetings.

The goal at this stage is to reduce barriers that may prevent the lead from signing up. Nurturing for the decision stage reinforces the expertise of your program and the successful result of other people with a similar problem.

**A lead in the decision stage will convert if handled expertly. These leads are the highest value to your practice and should be handled individually by an agent, not left to nurturing to close the sale.**

## Post Purchase

Although post-purchase is usually not considered part of the buyer's cycle, it still has a great deal of value for your practice and patients in this stage respond to nurturing. Satisfied customers refer family members and friends and represent the most cost-effective marketing your practice has available.

The goal of nurturing during the post-purchase period is to ensure the new patient feels welcomed and that you are actively fulfilling the promises that you made in earlier stages.



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## Building Objective

## Understanding

Developing a successful nurturing strategy begins with generating objective data on which to base decisions.

The objectivity is essential because we have a natural tendency to answer questions as if we were a prospective client. Given the training and insider knowledge that we possess in our particular medical specialty, it is impossible for us to act like someone who knows little or nothing about our service.

It is equally unhelpful to lean on the anecdotal experience of the few people who may have shared their experience with you during treatment. These people may not be representative of other prospects who have not become patients. In fact, they may not even be representative of the people who have.

Your successful strategy relies on an ongoing program of data collection sourced from the leads you are targeting. Behavioral data collection along with surveys of prospects and patients and interviews with people to honestly discuss their experience with your service will yield the data your program depends on for objectivity.

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**'79% OF MARKETING  
LEADS NEVER  
CONVERT INTO SALES.  
LACK OF LEAD  
NURTURING IS THE  
COMMON CAUSE OF  
THIS POOR  
PERFORMANCE.'**

**SOURCE: MARKETINGSHERPA**

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**'LEAD NURTURING  
EMAILS GENERATE AN  
8% CTR COMPARED  
TO GENERAL EMAIL  
SENDS, WHICH  
GENERATE JUST A 3%  
CTR. '**

**SOURCE: HUBSPOT**

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## 1. Identify Your Customer

Before you can create a nurturing solution, first you must identify the traits of those you are attempting to nurture.

- Who are your customers?
- What does an ideal customer look like for your service?
- What problem are they seeking to solve?
- What is the trigger that causes them to seek help?
- What is important to them that this issue threatens?
- Why did they look at your service?
- What marketing attracted them?
- Why did they choose/not choose your service?
- What were the most important factors in their decision?
- Was there anything in particular that attracted/repelled them about your service?

If you cannot find intersections, it is because your sales cycle is not well aligned with the buyer's cycle. The lack of alignment between the two makes it harder for the lead to convert. Your sales will improve simply by working on realigning these two processes. You may find our *Medical Practice Workflow Guide* useful if you find yourself in this situation.

## 2. Define Your Buyer's Journey

Your nurturing strategy recognizes the differing information needs of leads as they move through the buyer's journey. Defining the unique path that your leads will follow to become patients of your practice allows you to identify each stage based on the lead's activities and provide information appropriate to the stage.

Begin with those in the awareness stage who have little or no knowledge of your medical specialty and are probably unaware of your practice. These are first-time visitors to your website or visitors to landing pages from your search marketing.

Move through the consideration and decision making stages continuing to identifying tasks and activities most likely to occur during this stage.

Now, look at your sales workflow. Do the activities you identified as part of the buyer's journey match those in your workflow? These intersecting points represent moments when you can modify communication to match the information needs of the lead. Your goal is to find at least one intersection that represents a stage in the buyer's cycle.

### 3. Establish Stage Goals

Once you identify the stages of your buyer's journey, it's time to match specific and measurable goals for each stage.

The following table shows examples of goals aligned with stages in the buyer's journey.

Stage	Goal
Awareness	Engage lead Create communication preferences
Consideration	Build trust with education Answer survey View information video View Information Seminar
Decision	Create lead profile Make a free Information appointment
Post Purchase	Maintain long-term contact Get referrals Get Testimonials Get positive reviews Make add-on sales

This list is by no means comprehensive. What it demonstrates is that there are several appropriate goals for each stage. Each of these goals is supported by a campaign later in the process.

## 4. Define Your Content Plan

Effective nurturing programs consist of various types of content all designed to direct leads toward the desired goal. Email communication is a mainstay of most programs, but social media, videos, website landing pages, articles, whitepapers, and even text messaging all have a role to play.

Each stage in the buyer's cycle responds to a specific type of content and messaging.

Awareness stage leads are searching for easily consumed broad topic information such as tips and infographics. They do not readily respond to brand promotions, surveys or detailed education topics.

In the consideration stage, leads are looking for more detailed information or education materials covering the problem and all available solutions. Brand promotions and "contact us" style calls to action have limited effectiveness. Capturing additional information from these lead relies on a value swap strategy. Gated content is available only after the leads share basic information that adds to their nurturing profile.

Leads in the decision stage are sales-ready and respond to promotions and "contact us" calls to action. Content that reinforces the expertise and success of the practice is especially useful as are testimonials from satisfied customers.



## 5. Define Your Calls to Action

Your call to action (CTA) is arguably the most important part of any nurturing content you create. It is intended to elicit an immediate action that achieves the goal you defined for that stage of the buyer's journey.

A CTA may be downloading a PDF, completing a survey, signing up for a seminar or registering for an event. The CTA is specific to the product or service, stage, and needs of the lead.

Guidelines for Creating Effective Calls to Action.

- CTAs should use actionable verbs and appropriate power words. Find a list of power words and include one in every CTA you create.
- Contrast the color of your CTA with other content. People have to see the CTA before they can use it.
- Use one CTA per campaign to avoid paralysis of choice
- Make the value proposition clear. Try to use a value-add for all CTAs, even contact forms.
- Use landing pages dedicated to the CTA
- Match the CTA to the Buyer's stage.
- Buttons with Submit, Download, or Contact Us are less effective than actionable and compelling phrases that attract action.
- Personalize the CTA where possible using the leads name or other information.
- Make the CTA easy to complete. If you intend to use a phone number as your CTA, make sure it is a dedicated number answered around the clock and without the standard phone directory usually found in medical practices.

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## Bariatric Lead Persona

*Our bariatric patient is a 37 y/o female with a BMI of 43.5. She is married and has a child starting high school. She has high blood pressure and borderline type 2 diabetes. She has attempted a variety of hypocaloric diets and was successful in most. She regained the weight within a year on all of these diets even when assisted by anorectic medications.*

*She exercises semi-regularly does not smoke. She drinks only socially. She has a family history of obesity and significant co-morbidities and has been overweight since childhood. She has insurance with 100% coverage for bariatric surgery and a strong support system.*

*Her greatest concern is worsening co-morbidities and not being around for her child. She has looked online for information about bariatric surgery but is concerned by the stories of complications. She has a friend who had bariatric surgery and has done very well.*

# Sample Lead Nurturing Strategy

Let's begin with simple example of a lead nurturing strategy for a surgical weight loss program.

When identifying your typical patient keep concepts broad unless they may indicate a different way of marketing. As an example, it is probable that the motivation for women to seek obesity treatment is different to that of men and this represents an opportunity for additional targeting.

Begin with a single ideal patient that represents the largest number of patients for a particular service. If necessary, add other personas when the nurturing program for this one is running successfully.

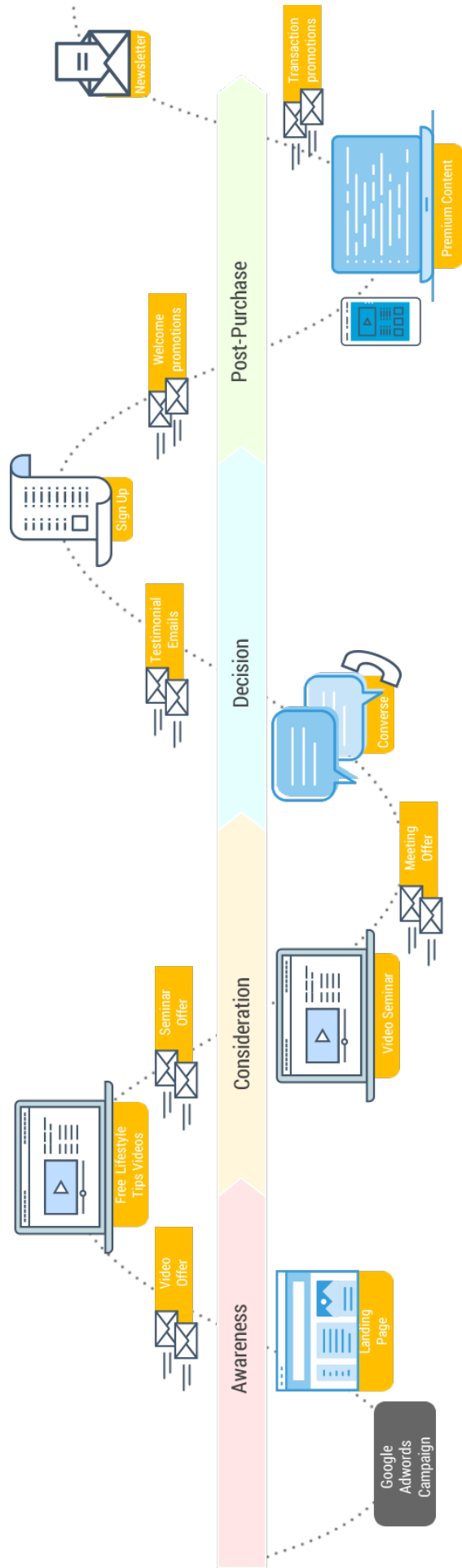
## the Ideal Buyers Journey

Next, you will define the ideal buyer's journey. Imagine everything in your marketing is working flawlessly. How do you address the needs of the buyer at each stage in their journey? What assets delivered through which channel will best meet the buyer's needs?

## Align Sales Workflow

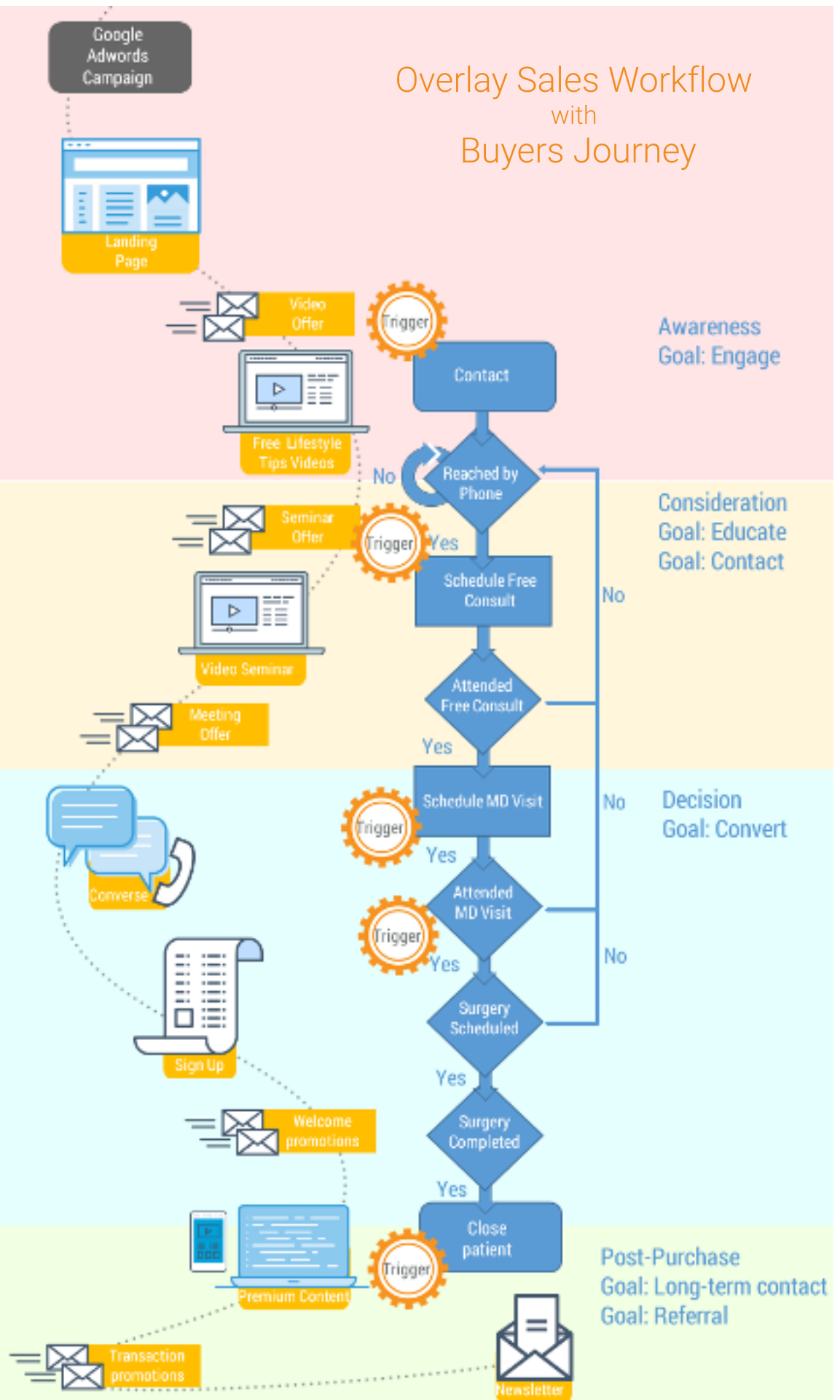
Now take your buyer's journey and align it with your sales workflow. Identify activities and tasks in your workflow where triggers or other automation tools can deliver your assets to the lead.





An idealized buyer's journey

## Overlay Sales Workflow with Buyers Journey



## Create Content

Creating content to distribute during the buyer's journey is difficult for most medical practices. Content creation is most likely to be outsourced to a third-party skilled in writing highly relevant and stage appropriate content.

### Content Types

**Original content:** Content you create yourself is the most desirable as it is not available anywhere else making it of greater value to leads. Experts usually produce original content so rely on insights from your physicians and other experienced providers. Remember to avoid self-promotion. Your goal is to provide valuable information to your leads and encourage them to opt-in to receive more.

**Curated content:** If you have access to great information that is difficult to find elsewhere, sharing that information as curated content is also valuable. Some nurturing programs are based solely on aggregated, organized and circulated content. As long as the content is highly relevant to your potential buyers, originality is secondary. Remember to credit the source appropriately.

**User-generated content:** Some content generated by users is highly valuable. Testimonials and frequently asked questions often provide insights for potential buyers that make them valuable content to distribute.

The most common mistake made when creating content for your leads is forgetting the target audience.

Jargon-filled medical research is of little interest to non-medical readers. **Always keep your audience in mind and strive to provide value not marketing.**

## Creating a Nurturing Email

The nurturing email is the most important part of your nurturing strategy. Consistent style, temperament, and messaging that resonates with your leads is essential to continuing success. For people to continue receiving your emails, they have to be useful to them. Each email must offer what the buyer needs right now whether it is savings, entertainment or education to solve their problem.

Keep the following point in mind when creating nurturing emails.

- Short is best.
- Personalize as much as possible.
- Place important information and calls to action above the fold.
- Design for mobile. The fold is shorter on mobile devices.
- Create a compelling but truthful subject line.
- Focus on the benefit to the lead. It is all about them.
- If you want something, offer something of value in return.
- Be polite and if you are funny, be funny. If you are not – don't.
- One Call to action per email.
- Be relevant.

## The Final Word.

In the world of nurturing, timing and relevance is everything. Unless you are dealing with only a handful of people, you will need a system like Influx MD to automate your lead nurturing strategy.

Systems such as Influx MD not only segment your lists to ensure relevant communication, they hyper segment to create emails that appear written specifically for the lead. The result of this level of personalization, is higher open rates, click through, and conversion of leads to patients.

Although nurturing appears complicated initially, starting with a single service and creating a nurturing program that works and can serve as a model for other services is fairly straightforward.

The benefits of nurturing, especially in practices with more than 50% lead loss rate at the top of the sales funnel are significant. The most often cited statistic is a Forrester's research study that indicates a 50% increase in lead conversion and 33% reduction in cost.

By adopting an iterative and incremental approach to building your lead nurturing program, using the right technology to automate throughout the workflow, and relying on metrics to make decisions, you will create a string nurturing program and realize significant benefits for your medical practice.

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**'BUSINESSES THAT  
USE MARKETING  
AUTOMATION TO  
NURTURE PROSPECTS  
EXPERIENCE A 451%  
INCREASE IN  
QUALIFIED LEADS.'**

**SOURCE: THE ANNUITAS GROUP**

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2018

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