



State of Healthcare Marketing Technology

Survey reveals how the industry's MarTech stacks stack up

BY SAURAB BHARGAVA, CHIEF DIGITAL OFFICER, AND KEIR BRADSHAW, EVP, TECHNOLOGY

The marketing technology (MarTech) stack has become a crucial tool for coordinating, automating, and targeting messages to healthcare consumers. In fact, nearly 60% of healthcare organizations say investing in MarTech infrastructure is an organizational priority, yet many struggle to assemble and fully use a comprehensive stack. Adding to the complexity, the COVID-19 pandemic created a uniquely challenging situation for organizations already navigating an evolving healthcare ecosystem.

To understand the impact, MERGE conducted a MarTech Insights Survey in partnership with Greystone.Net, a digital consulting company for hospitals and health systems. The survey was designed to learn about the challenges healthcare marketers face as they build and use a technology stack, the role of the pandemic in identifying MarTech strengths and weaknesses, and solutions to top MarTech obstacles. We surveyed over 90 healthcare organizations from June to August 2020, ranging from large, >1,000-bed health systems to smaller systems with fewer than 200 beds, academic medical centers, and non-academic organizations. For this study, a MarTech stack was defined as a series of software programs and platforms that drive marketing, communications, marketing automation, marketing operations, and more.

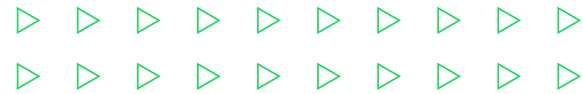
We presented the survey results and shared our recommendations on how to address several common barriers to optimizing the MarTech stack in a webinar presentation co-led by Greystone and Saurab Bhargava, MERGE’s Chief Digital Officer, and Keir Bradshaw, EVP, Technology.



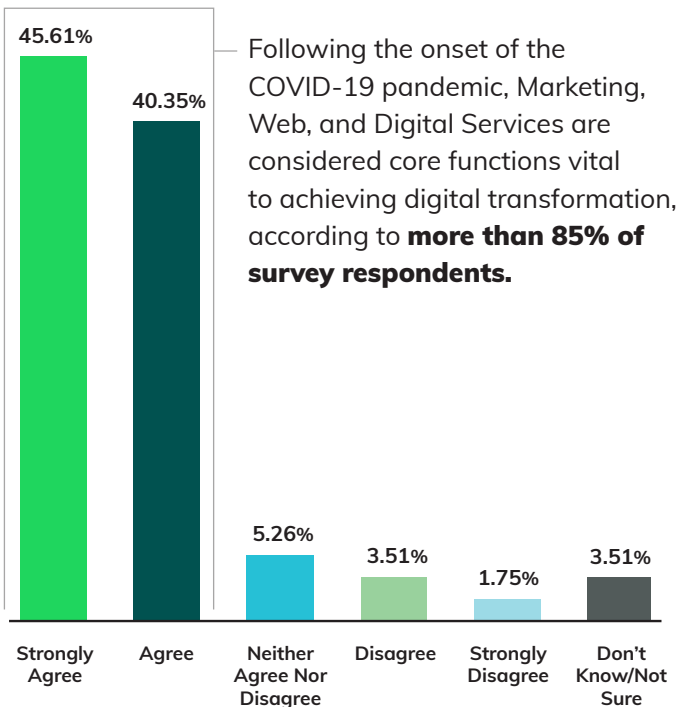
Key Survey Findings

As you might expect, our survey confirmed that, since the onset of COVID-19, healthcare marketing and digital teams have leveraged the MarTech stack more than ever. The most significant challenges faced by marketers during the pandemic have included “Having the right tools and technologies to deploy our strategies” and “Having staff available to maintain and execute our non-COVID-19 content strategy.”

Here are some of the meaningful insights we discovered:



MarTech is Vital But Many Stacks Lacking



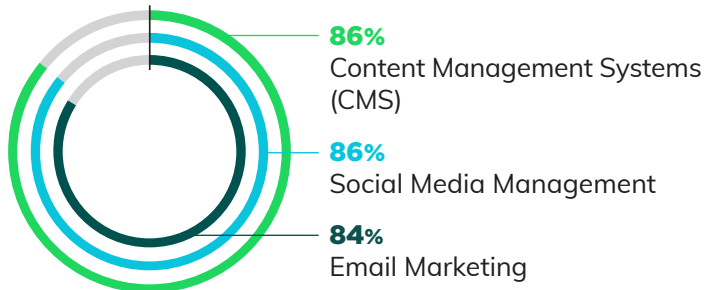
>10% of respondents were confident that they had or have a formal, organized MarTech stack

63% said they have a MarTech stack that is loosely integrated and organized.

Nearly 28% said they do not have a MarTech stack.

Defining the Stack: Top Three Tools

The top three systems cited as a part of the MarTech stack were



The majority of respondents also cited search engine optimization (SEO) tools, analytics, customer relationship management (CRM) systems, and advertising and promotions.

COVID-19 Impacts on the Stack

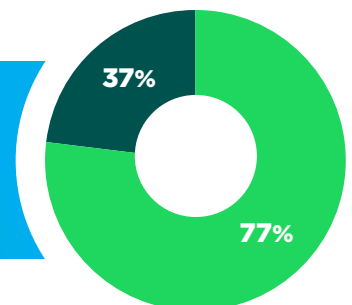
During the height of the initial COVID-19 wave, respondents most heavily **relied on their social media management (77%), email marketing (63%), and CMS (62%) systems.** Analytics, CRM Systems, and Advertising and Promotions were also mentioned by over 30% of respondents.

However, **66% said they struggled with the lack of a single or streamlined channel**—as well as lack of the right tools and staff—to deploy communications quickly.

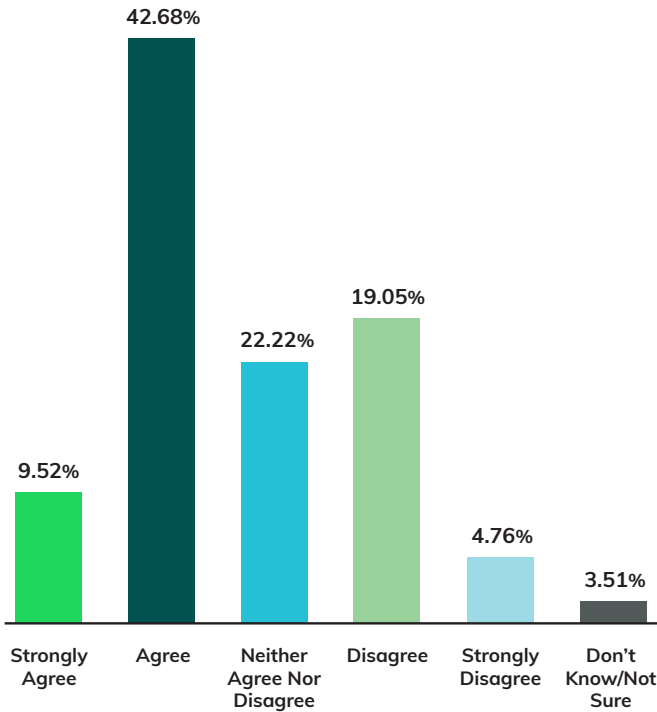
Workforce Adjustments: Impacts to Workload and Staffing

Nearly 75% of survey respondents said they've kept marketing staff levels the same as before the pandemic but with "significantly more work" to do. Smaller organizations, those under 200 beds, were more likely to furlough staff during the pandemic.

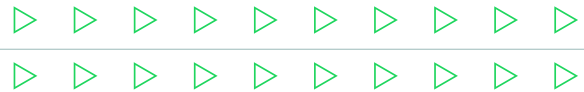
A majority of organizations (77%) said their marketing staff had significantly more work during the pandemic, and 37% of organizations said the work was uneven—some had more work and others were less busy.



Staff was well suited to leverage the full MarTech stack.



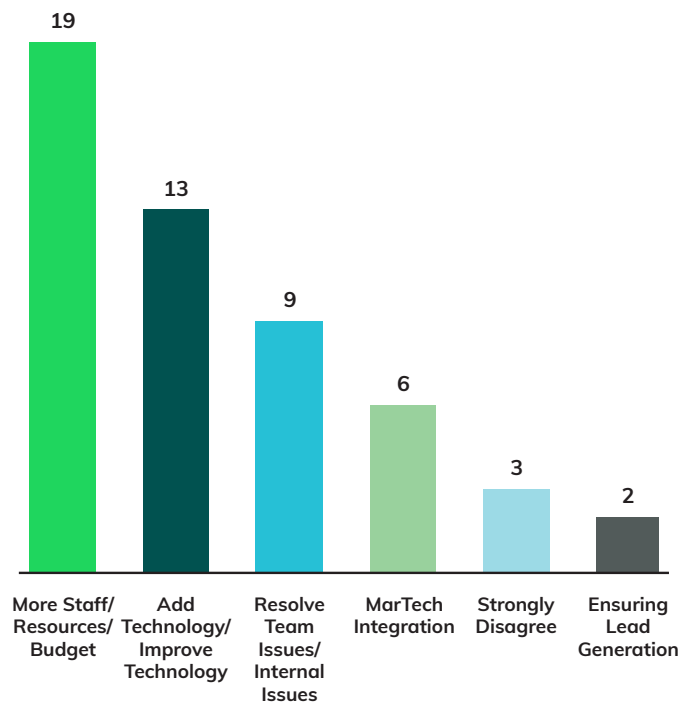
Over half of respondents felt that their internal staff and other resources were well suited to fully use and take advantage of their MarTech stack. However, a large number still cannot agree with that statement. For those who disagreed, over half said it was because “Staff was not adequately trained on the tools available.”



Looking Ahead

60% of respondents felt that investing in MarTech stack infrastructure would be an organizational priority following the pandemic. The **highest priorities for improvement in the MarTech stack** were: CRM, Business Intelligence/Data Analytics, and Email Marketing/Marketing Automation Platform. The most significant **needs to improve** for respondents to do their jobs and meet their organization’s needs include more staff/resources/budget and to add or improve technology.

Top needs for improvement.



Transformation Opportunities

This research shows that while hospitals and healthcare organizations see Marketing, Web, and Digital Services as vital core functions, most do not have a clearly defined MarTech stack, and many cite the need for additional tools, training, resources, staff, and strategy. But opportunities exist for marketing services to help achieve digital transformation.

Healthcare marketers must define what they're trying to achieve for their organizations by using a MarTech stack. For those tasked with justifying such investments, it's important to convey how MarTech initiatives will help drive business priorities, such as patient retention.

As a marketing team, you may have identified priorities for your MarTech Stack, but in order to gain boardroom approval, ensure they're aligned with their priorities like preventing leakage and decreasing patient readmissions. These can serve as a beacon or guiding light for you and your team.

Many healthcare executives are ready and willing to invest in MarTech. They just need a better understanding of how it will work and how the vision matches their business goals and patients' expectations. Priority alignment with the boardroom will carve out larger opportunities for your team and respective investment.

What about after a strategy is set and boardroom approval received? Marketing leaders who feel a bit paralyzed can look at data they already have, find some quick wins, and use the lessons learned as a blueprint for growth. For example, piloting a program can show the rest of the organization that there's momentum, as well as informs a long-term plan. But don't overlook the "people" element. It's essential to empower the marketing team through supportive training, hiring more staff, or partnering with outside agencies who can deliver strategic and tactical assistance.





For marketing leaders who need to build out justification for a larger investment in marketing technologies and staff, our advice is to shift the overall viewpoint from executing promotional campaigns for individual units/practices to being a business driver for boardroom priorities. When marketing is seen as an operations and business development driver, the conversation starts to change—these aren't marketing expenses; these are technologies and investments that will propel the organization forward. They show return on investment as it translates into operational efficiency, as it shows an increase in appointment requests, conversion into education and wellness programs, and provides a point of proof that marketing activities decrease readmission.

As we take these insights to the table and speak to those issues, it gets a different level of attention. The organization sees what we're trying to do, and it opens the door for justification of larger investments.

No matter where organizations start, tackling bite-sized tasks one at a time can get things moving and generate momentum. Although it can be difficult to integrate various components of MarTech, try not to get overwhelmed or succumb to analysis paralysis. Marketing teams don't need to boil the ocean. Instead, identify near-term proof points—and keep building from there.

Be willing to listen and learn, try things, have a boldness that some things may not work—and that's okay. You're ahead of 75% of organizations out there once you've gone past the point of paralysis.

About MERGE

We merge storytelling and technology to promote health, wealth and happiness in the world. Our solutions personalize brand expression and optimize customer engagement for a fully digital, deeply human experience. Our services include strategy, creative communications, experience engineering, digital platforms, media, shopper marketing and more. With 550+ employees across offices in New York City, Boston, Atlanta, Chicago, Kansas City and Orange County, MERGE's task-to-talent model gives clients access to on-demand expertise and agile teams for rapid innovation and award-winning implementation.



Saurab Bhargava, Chief Digital Officer

Saurab helps clients to define online and digital solutions for dramatic impact on businesses, align leadership teams across functional silos towards these initiatives, and leads teams through execution and transformation across platforms, processes, and culture. He brings together executive-level strategy, leadership, and delivery in order to achieve profound results in revenues, efficiencies, and customer loyalty and satisfaction.



Keir Bradshaw, EVP, Technology

Keir brings a strong background in healthcare IT and more than twelve years of web and application development experience. Having also worked in academic research and government environments, he understands the unique challenges facing hospitals in today's digital age. Keir's priorities include overseeing the development of new applications and web products, heading a team of talented developers and programmers and working directly with clients on technical requirements and functionality.