



forum FOR HEALTHCARE STRATEGISTS

28TH ANNUAL

Healthcare Marketing & Physician Strategies Summit

APRIL 17-19, 2023 | AUSTIN, TX



FOCUS ON:

- Strategic Marketing
- Communication Strategies
- Interactive & Digital Strategies
- Data Strategies
- Engagement Strategies
- Physician Relations & Sales

With Special Support From

loyal



Join Us at Healthcare's Leading Marketing & Physician Strategies Summit

The Healthcare Marketing & Physician Strategies Summit (HMPS23) continues a 28-year tradition of identifying the rapidly changing healthcare marketing, communications, digital, and physician relationship opportunities and challenges and tackling them head-on. It is THE place where actionable strategies and solutions are shared by senior-level executives from healthcare organizations nationwide.

Dear Colleague:

Throughout the years, the roles of healthcare marketing, communications, strategy, and physician relations executives have evolved and significantly grown. The Healthcare Marketing & Physician Strategies Summit (HMPS) has kept pace with those changes, calling attention to important themes, new developments, and innovations.

Regardless of how our roles and organizations have evolved, a common thread has continued to be the importance of communicating, connecting, and developing long-lasting relationships. Increasingly, those ends are being achieved via digital channels—but traditional channels remain important as well. As the balance evolves, we can learn from our colleagues and benefit from sharing success strategies.

That's why this year's Summit is more important than ever. Through more than 65 cutting-edge sessions, you'll have the opportunity to examine the critical issues and challenges your peers face every day. We're confident that you'll emerge with new ideas and strategies that will help you face—and shape—the future.

We hope you'll join us this year in Austin.

HMPS23 Chairs



Susan Alcorn
Strategic Counselor
Alcorn Strategic
Communications and
Jarrard Phillips Cate &
Hancock



Kriss Barlow
Principal
Barlow/McCarthy



Chris Boyer
Vice President, Digital &
Marketing Intelligence
Beth Israel Lahey Health



Terri Goren
Principal
Goren & Associates, LLC

28TH ANNUAL

Healthcare Marketing & Physician Strategies

Summit

APRIL 17-19, 2023 | AUSTIN, TX

Who Should Attend

HMPS23 is designed for the following executives from hospitals, health systems, academic medical centers, integrated networks, and medical groups:

- Chief Marketing Officers/Marketing Executives
- Chief Communications Officers/Communication Executives
- Chief Strategy Officers/Senior Strategists
- Business Development/Planning Executives
- Digital/Web/Social Media Strategists
- Physician Relations & Sales Executives
- Physician Referral/Outreach Directors
- Public Relations Executives
- Advertising Executives
- CRM Directors
- Consultants



forum FOR HEALTHCARE STRATEGISTS

The **Forum for Healthcare Strategists** provides networks of communication and support and opportunities for professional development, with the ultimate purpose of inspiring new, more effective models of care. www.healthcarestrategy.com

Pre-Summit Strategy Sessions

The Pre-Summit Strategy Sessions are designed to give attendees time to explore and interact on timely issues.

Monday, April 17 | 8:00 – 10:00a

Note: Separate conference registration fees apply to the Pre-Summit Strategy Sessions. Please check the Registration Form for details.

Fuel Marketing Impact Using Mapping, Personas & Patient Understanding

Empathy and understanding have never been more important in marketing. Learn how to capture human-centered insights and understanding by leveraging mixed-methods research into the strategic and creative design process. Hear how to build powerful journey maps and related personas. Take home a set of proven tools and resources!

Christina Deidesheimer, VP, Communications & Outreach, Chief Communications Officer, Beebe Healthcare

Jordis Rosenquest, VP, Brand Development & Planning, Baylor Scott & White Health

David McDonald, Co-Founder & CEO, LIFT Healthcare

Crisis Planning for the Modern Moment

Every healthcare communications pro knows that a crisis will come their way. Join us for interactive scenario planning, laying the groundwork for crisis communications, then identifying the acuity of different situations and working through communications plans for each tier in a time-constrained scenario that mimics the real pressures of a challenging day. Bring your questions, issues, and crises and let's practice crisis tools for quick responses.

James Cervantes, SVP & Practice Leader *and*

Kim Fox, Partner & Regional Practice Leader, Jarrard Phillips Cate & Hancock

Google Analytics 4: What's It All About?

Google is close to sunseting its current measurement platform, Universal Analytics, and replacing it with GA4, a next-generation tool. You may have added new tags to your site, but that's just the start! Attend this hand-on workshop to examine GA4's new features, learn what to do (and what not to do) as you get started, and discuss best practices for maximizing your business impact.

Allison Urffer, Director, Marketing Data Intelligence, Geisinger

James Gardner, Director, Healthcare Strategy *and*

Adrienne Ritchie, Strategist, Growth & Insights, OHO Interactive

Build a Future-Driven MarTech Function

As consumerism and technology trends continue to reshape the landscape for health systems, digital transformation is a baseline requirement. Hear how seasoned leaders are evolving their teams to be future-ready. Examine key roles, responsibilities, and job functions, as well as the evolution of skills required in MarTech, content, and more. Explore how to deal with "doing more with less."

Sue Omori, Executive Director, Marketing Account Services, Cleveland Clinic

Rob Whitehouse, VP, Marketing & Communications, TriHealth

Tom Hileman, Managing Partner, Digital, Global Prairie

Physician Relations: New Volume Building Strategies in a Competitive Market

With the tightening of physician alignment and economic pressures to grow referrals, developing innovative field strategies to beat the competition is front and center for physician relations leaders. Learn how to manage market disruptions, reprioritize retention strategies, and enhance business planning and targeting. Take home tools and techniques to strengthen relationship-building skills and grow market intelligence.

Raymond Anderson, SVP & Chief Strategy Officer *and*

Ann De Los Santos, VP, Physician Partnerships & Strategic Growth, Ascension Texas

Veronica Campbell, Network Director, Physician Relations & Market Development, HonorHealth

Susan Boydell, Partner, Barlow/McCarthy

Summit Schedule At-A-Glance

SUNDAY, APRIL 16

3:00–6:00p Registration

MONDAY, APRIL 17

7:30a–5:45p Registration

8:00–10:00a **Pre-Summit Strategy Sessions**

10:15–11:15a **Concurrent Sessions**

11:15a–12:00p New Attendee Meet & Greet

12:15–1:15p **Concurrent Sessions**

1:30–2:30p **Concurrent Sessions**

2:30–3:15p Break in the Exhibit Hall

3:15–4:15p **Concurrent Sessions**

4:30–5:45p **General Session**

5:45–7:15p Opening Reception in the Exhibit Hall

TUESDAY, APRIL 18

7:30a–5:00p Registration

7:30–8:00a Continental Breakfast

8:00–9:15a **General Session**

9:15–10:15a Break in the Exhibit Hall

10:15–11:15a **Concurrent Sessions**

11:30a–12:30p **Concurrent Sessions**

12:30–2:00p **Luncheon Keynote**

2:15–3:15p **Concurrent Sessions**

3:15–4:00p Break in the Exhibit Hall

4:00–5:00p **Concurrent Sessions**

5:00–6:30p Reception in the Exhibit Hall

WEDNESDAY, APRIL 19

7:00–11:45a Registration

7:00–8:00a **Sunrise Breakfast**

8:00–9:15a **General Session**

9:30–10:30a **Concurrent Sessions**

10:45–11:45a **Concurrent Sessions**

11:45a Summit Adjourns

STRATEGIC MARKETING

Sponsored by Wolters Kluwer

10:15 – 11:15a

Balancing the Brand Care Team

Marketers at Arkansas Children’s saw the benefit of working with a coordinated team of subject matter experts, both within and outside the organization. Hear how they orchestrate collaborative teams of best-in-class partners across the marketing spectrum to plan and deploy campaigns smarter, faster, and in line with systemwide goals.

Stephanie Pierce, VP, Strategic Marketing
Arkansas Children’s

Joel Cessna, VP, Sales, Eruptr

Mickey Wildt, Associate Director, Client Engagement, Core Health

Lauren Minors (Facilitator), Director, Partnerships & Marketing, Reason One

12:15 – 1:15p

Mental Health: A Call to Action

Anxiety and depression have increased by a massive 25% globally, according to WHO, and possibly more. Yet, people wait weeks or even months to access behavioral health services, often leading to additional delays in accessing physical health services. Join us to explore the implications for patient engagement, digital health investment, and physician relations.

Chris Hemphill, Sr. Director, Commercial Intelligence, Woebot Health

Aaron Novotny, PhD, Director, Healthcare Economics
Arkansas Blue Cross Blue Shield

Katie Fellin (Facilitator), Partner
ECG Management Consultants

1:30 – 2:30p

The Long & Short of It: Brand-Building vs. Acquisition

As the pressure for proving marketing effectiveness builds, marketers struggle with the right balance of brand-building and acquisition marketing, and especially the proper measurement of each. Examine an evidence-based model to build, execute, and assess a balanced, efficient marketing program. Hear how a long and short marketing structure can put roles, budget allocation, measures, and expectations into the right perspective.

Bill Robertson, CEO, MultiCare Health System

Jerry Hobbs, President, PrairieDog

3:15 – 4:15p

EHR Powered Marketing: Supercharge Your Marketing Game

An EHR can support an organization’s marketing priorities, including communication with patients before, during, and following their visits. Hear how to better engage patients, and increase loyalty, by leveraging EHR functionality.

Reed Smith, VP, Digital & Innovation
Ardent Health Services

Don Stanziano, Chief Marketing & Communications Officer
Geisinger

Sam Seering, Product Manager – Cheers
Epic

Ben Texter, Co-CEO & Co-Founder
Digital Health Strategies

4:30 – 5:45p

Sponsored by Actium Health



Wow, Work With, and Win Customers Now

A “one size fits all” customer experience is no longer viable. Understanding and catering to customers—including employees and physicians—based on racial, ethnic, generational, and lifestyle differences is key to exceeding expectations. Hear how to listen to customers...really listen.

Kelly McDonald, Diversity, Marketing & Customer Experience Expert & Bestselling Author

COMMUNICATION STRATEGIES

Sponsored by Revive

Reducing Health Inequities: Identifying Needs of Specific Patient Populations

Good Shepherd Health Care System analyzed community health data to uncover disparities and opportunities for care. Examine how they use multimedia and digestible content to help address such issues as obesity and nutrition, health screenings, and behavioral health access with target audiences.

Jessica Reker, RN
Director, Community Health & Outreach
Good Shepherd Health Care System

Jana Distefano
Director of Community Health
PRC

The Power of Video Brand Story Building

Video is one of the most powerful brand story building mediums. Hear how brands use video to tell their stories in impactful, cost-effective ways. Examine topics including ideation, content planning and strategy, budgeting, video scripting, filming and production, repurposing, and curation.

Kelly Campbell
Division VP, Marketing, Communications & Sales
Virginia Mason Franciscan Health

David Perry
EVP, Strategy
Bowstring Studios

From Celebration to Violence

Healthcare workers have gone from being celebrated as heroes to encountering an alarming rise of violence. Hear how to build a better environment by listening to team members and working with the C-suite to review and update policies. Explore solutions for supporting workers and ensuring safety.

Elizabeth Baker, Executive Director, System Marketing
Indiana University Health

Ara Telbelian, Director of Marketing, Brand Management & Marketing Operations
Henry Ford Health

Kathy Dean (Facilitator), Senior Advisor
SPM Group

Communication Strategy Counts During Labor Unrest

Negotiations between hospitals and unions have always been complicated. Today, they are regularly becoming longer in duration and more contentious, and are receiving a higher level of public scrutiny. Hear how to develop strategies to communicate effectively with internal and external audiences. Examine the impact on your brand.

Alan Shoebridge
AVP, National Communication
Providence

Karen Wish
VP & Chief Marketing Officer
Mount Sinai Health System

INTERACTIVE & DIGITAL STRATEGIES

Sponsored by Reason One

Execute a Sizable Web Content Update

Children’s Health set out to update more than 2,000 web pages. The goal...to boost search results and increase appointments to key service lines. Hear about the tools used to prioritize service-lines and how they created standardized content templates; gained physician buy-in; and kept writers, reviewers, and stakeholders on-track. Initial results...a 142% increase in web traffic to revamped pages and a 236% increase in appointment requests.

Kristen Kimmel, Director Digital Marketing
Children’s Health (Dallas)

Justin Matlick, Founder
Message Lab

The Digital Team of the Future

Digital teams are evolving to shape consumer and provider experiences. Hear how digital and marketing executives partner with CIOs and others as they hire, train, and retain employees. Examine the data and tools needed to improve effectiveness in a cost-effective way.

Pamela Landis, SVP Digital Engagement
Hackensack Meridian Health

Margo Schneider, Senior Executive Director,
Digital Strategy, UW Medicine

Matthew Sluzinski, Senior Director, Digital & Web Strategy, RUSH

Dalal Haldeman (Facilitator), CEO
Haldeman Marketing, LLC



Lead with Content Strategy for a Successful Rebrand and New Website

Kettering Health focused on content and digital strategy to promote its rebrand. Hear how the content strategy created powerful user experiences that generated a 20% increase in Net Promoter Score and a 235% lift in location engagement. Learn how Kettering uncovered stories, aligned teams, and defined a clear “why” for content.

Jimmy Phillips, VP, Marketing & Communications
Kettering Health

Ahava Leibtag, President
Aha Media Group

Brandon Scott, VP of Digital
Ten Adams

The Time is NOW to Prepare Your Website for the 5G Revolution

Increasingly, healthcare organizations are focused on connecting with customers whenever and wherever they want. The goal...to strengthen customer loyalty and protect market share. But, can your website infrastructure and content support this faster connection? Hear how to prepare your website to bring out the most in your content.

Christopher Catalo
Chief Executive Officer
HealthNxt | a Tech Mahindra Company

Sujal Raju
Founder & CTO
Enqator

DATA STRATEGIES

Sponsored by Playbook for Health

10:15 – 11:15a

Market-Specific Intelligence Can Safeguard & Grow Your Network

By turning data into intelligence, CHRISTUS Health is tackling patient out-migration and physician referral leakage. Hear how visibility into provider-specific referral patterns, loyalties, and patient interactions fuels field conversations that support physician alignment and network expansion. Examine how claims data is used to identify unmet needs and opportunities for growth.

Keith Yezer, VP, Strategy Management
CHRISTUS Health

Michael Faulkenberry, VP, Strategic Advisory Services
Stratasan, a Syntellis Company

12:15 – 1:15p

Big Data vs. Thick Data: The Road to Data-Driven Marketing

When you combine the powers of quantitative and qualitative data, the possibilities are endless. Examine approaches as well as limitations. Learn how to apply the principles of sound market research, ethnography, and critical analysis to healthcare problem solving. Hear practical steps to achieve true data-driven marketing.

Dean Browell
Chief Behavioral Officer
Feedback

Danny Fell
Senior Strategist
Optum

1:30 – 2:30p

Tracking Results: From First Contact to Downstream Revenue

From digital to direct mail to outdoor advertising, tracking impact of your campaigns is critical to demonstrate ROI. But following a customer from first contact to downstream revenue is an ongoing challenge. Hear how to successfully track patients from CRM to EHR to better understand your marketing effectiveness and adapt strategies as needed.

Suzanne Sawyer
Rich Phillips
Managing Director, Huron
Clay Ritchey
CEO, Verato

3:15 – 4:15p

Decode Your Marketing Technology Strategy

Marketing technologies are constantly changing. Join digital leaders to decipher the components of a MarTech stack. Hear how to prioritize technology investments; develop business cases; and leverage digital technologies to support organization-wide strategies.

Chris Boyer, VP, Digital Strategy & Marketing Intelligence, Beth Israel Lahey Health
Jeremy Harrison, Director, Digital Services MultiCare Health System
Kathy Smith, VP, Chief Marketing & Digital Officer Roper Saint Francis Healthcare
Aaron Watkins, Sr. Director of Internet Strategy Johns Hopkins Medicine



4:30 – 5:45p

Sponsored by Actium Health



Wow, Work With, and Win Customers Now

A “one size fits all” customer experience is no longer viable. Understanding and catering to customers—including employees and physicians—based on racial, ethnic, generational, and lifestyle differences is key to exceeding expectations. Hear how to listen to customers...really listen.

Kelly McDonald, Diversity, Marketing & Customer Experience Expert & Bestselling Author

ENGAGEMENT STRATEGIES

Sponsored by IQVIA

Teamwork, Passion & Consumer Insights: Bring a New Brand Promise to Life

UMC Health System transformed from “just” a county hospital to the market share leader by optimizing its brand’s position in consumers’ minds. Examine how market research guided the process to ensure internal and external consistency. Hear how to engage buy-in and commitment to living the brand.

Susie Pfeiffer, Creative Director and
Kala Waits, Director of Marketing UMC Health System
Rob Klein, Founder & CEO Klein & Partners

Data Drives Enterprise-Wide Patient Engagement Strategies

Franciscan Health’s “Enterprise-Wide CRM” approach connects and aggregates data to make it available and useful across the ENTIRE healthcare journey. Learn what’s needed to gather and combine external data and how to use it to make informed decisions about care that will build loyalty, drive retention, improve clinical outcomes, and increase lifetime value.

Larry Meade, System Marketing Director, Engagement Platform Franciscan Health
Rachel Beachy, Sr. Director, Growth Strategy Innovaccer

Re-Engage Lapsed Patients

Consumers know preventive care is important, but COVID disrupted the normal cadence. Hear how two systems used CRM to strategically target lapsed primary care and mammography patients and motivate re-engagement, resulting in a positive ROI. Examine how to implement landing pages that make the patient journey easier. Learn how to determine areas of success and opportunity.

Janice Lamy, Chief Marketing Officer Franciscan Missionaries of Our Lady Health System
Stacey Nelson, Marketing Director Parkview Health
Cheryl Hodgson, Senior Account Director LionShare

Strategic Patient Engagement in a Highly Competitive Market

In New York’s highly competitive market, Catholic Health (Long Island) launched a CRM-intelligence-driven campaign to help patients understand their cardiac risks. Hear how patient data was used to build tailored AI Models for intelligent audience generation and outreach, and to develop targeted personalized communications. Examine the results.

Scott Orstad, VP, Marketing Catholic Health
Jenn Misora, VP, Client Success Group Actium Health

PHYSICIAN RELATIONS & SALES

Sponsored by Marketware

Lessons for Smaller Teams: Balancing the Many Obligations

Doing more with less is a challenge for everyone, but even more so for physician relations teams in specialty practices or rural markets. How do you accomplish all you need to do with a small team? When do you say no? Hear proven, practical lessons from the trenches.

Ashley Hilliard
Sr. Director, Practice Growth & Referral Relations Texas Oncology
Zan Smith, DNP, MHA, MSN, RN
Director of Service Line & Program Development Adventist HealthCare System Fort Washington Medical Center

Hire, Train, Develop & Retain the Right Team

Having the right team in place and knowing how to get the most out of them is key to delivering results in today’s healthcare environment. Learn how to assess your current talent, determine what skills and capabilities may be missing, and implement solutions for addressing gaps—whether through internal development or new recruitment. Hear how to work with HR for successful efforts!

Christy Stallings-Shoemake
Corporate Senior Director of Provider Relations Community Health Systems

Robust Internal Engagement Strategy Leads to Success

By their nature, physician relations programs are externally focused. Yet, understanding the strategic direction of the organization, and leadership goals and values, is mandatory for success. Hear how Mayo developed a process for true engagement, one that focuses on working with the internal team to design an approach, as well as outcomes for success.

Lindsay Draz
Director – Referring Provider Office and
Angela Puffer
Operations Administrator – Enterprise Referring Provider Office Mayo Clinic

Impactful Roadmap to Results: Using Data & Market Intelligence

AdventHealth has developed a thoughtful and intentional outreach plan driven by data and market intelligence. Examine the steps. Hear how to develop confidence and resiliency in the field while executing strategies. Learn how to build internal and external alignment of goals.

Brad Jones, Division Director of Physician Relations
and
Kelly McBreen, Physician Relations Manager AdventHealth West Florida

8:00 – 9:15a



Digital Transformation: Design Your Future

We don't have a choice on whether we digitally transform...the choice is how well we do it. The key is not only understanding digital trends—social media, IoT, AI, Blockchain, mobile, and more—but understanding how they work together. Leaders in this digital age are made, not born. Examine current and future digital trends to maximize your organization's impact.

Erik Qualman, Top Digital Transformation Expert, Futurist & Bestselling Author

10:15 – 11:15a

STRATEGIC MARKETING

Sponsored by Wolters Kluwer

How to Handle the Tough MarCom Questions

Leaders of Mount Sinai's MarCom team will provide a toolkit to guide you in answering the tough questions from stakeholders. Examine responses when the requests for support seem difficult or unreasonable. Bring your own scenarios and join us for real-world role playing!

Wendi Chason, Assistant VP, Service Line Marketing **and**

John Davey, VP, Marketing Technology **and**

Lucia Lee, VP, Public Affairs **and**

Karen Wish, VP & Chief Marketing Officer Mount Sinai Health System

11:30a – 12:30p

Brand Lessons from Outside Healthcare

Piedmont Healthcare, led by a Chief Marketing Officer who came from outside healthcare, is disrupting tradition using data, insights, and change management tactics in new ways. In this fireside chat, you'll hear how perspectives born from B2B and B2C experience at Proctor & Gamble and Georgia-Pacific shape unique approaches that challenge expectations and drive change in support of creating an ever more hassle-free, unified healthcare experience.

Douwe Bergsma, Chief Marketing Officer Piedmont Healthcare

Justin Wartell, Managing Principal, Monigle

2:15 – 3:15p

Loyalty Killers: What's Driving Patients Away?

With record levels of care deferment, stubbornly high levels of 'no preference,' and consumers who complete a care journey with no desire to return, healthcare has a commitment problem. Examine the factors that interrupt loyalty and keep patients from connecting to a provider before, during, and after care. Learn the surprising ideas and tactics that can reverse the loyalty dip and restore relationships between caregivers and care receivers.

John Berg, AVP, Marketing UF Health

Ryan Donohue, Strategic Advisor NRC Health

4:00 – 5:00p

Stories from the Trenches: What's Change Got to Do with It?

Your lives are likely to change again...soon. Is there a new CEO? A merger or acquisition? Budget cuts or staff reorganizations? Join your colleagues for this interactive, off-the-record session.

James Blazar, EVP & Chief Strategy Officer Hackensack Meridian Health

David A. Feinberg, SVP, Chief Marketing & Communications Officer, Mount Sinai Health System

Suzanne Hendery, Chief Marketing, Communications & Customer Officer, Renown Health

Jean Hitchcock (Facilitator), CMO Phoenix Children's Hospital

COMMUNICATION STRATEGIES

Sponsored by Revive

Integrate DEI Into Your Culture

Healthcare organizations are committed to integrating diversity, equity, and inclusion practices into culture. Join a panel of your colleagues and explore how MarCom leaders can impact the brand's ability to connect with diverse communities, as well as help drive DEI within their own organizations.

Deb Pappas, VP, Chief Marketing & Communications Officer Connecticut Children's Medical Center

Victor Reiss, System VP, Consumerism & Insights, UNC Health

Michiko Tanabe, VP, Chief Marketing Officer, Stanford Health Care

Chris Bevolo, CEO, Revive

Coping with Controversies

Every organization will be dealing with a divisive issue over the next few years. Will your organization take a stand or stand back and let the controversy swirl? Join your colleagues for an off-the-record, interactive discussion.

Selima Khan, VP, Marketing & Corporate Communications, Memorial Healthcare System

Michael Knecht, EVP, Chief Marketing & Communications Officer, RWJBarnabas Health

Gayle Sweitzer, VP, Marketing & Corporate Communication, The University of Kansas Hospital

Susan Alcorn (Facilitator), Strategic Counselor, Jarrard Phillips Cate & Hancock

INTERACTIVE & DIGITAL STRATEGIES

Sponsored by Reason One

The Social Determinants of the Healthcare Consumer

Healthcare consumers are driven by convenience, access, cost, relationships, and flexibility. Can healthcare organizations meet consumer expectations? Indeed, what kind of technology is required to do just that? Examine the intersection between what drives healthcare consumer behavior and the ongoing struggle healthcare organizations have in meeting their needs.

Matt Gove, Chief Marketing Officer Summit Health

Brian Gresh, President Loyal

Taming the Online Scheduling Beast

Luminis Health's newly launched website delivers a one-of-a-kind digital consumer experience. Examine the preparation and launch, including how questions about technology selection and integration with MyChart and other platforms were addressed. Hear how open access to scheduling increases patient access, reduces wait times, and improves the patient experience.

Jes Burke, Senior Web Strategist, Developer & Data Architect **and**

Eileen Harberts, Director, Marketing & Digital Experience, Luminis Health

Bryce Cannon, President, Modera

12:30 – 2:00p LUNCHEON KEYNOTE, You Can't Fight Gravity, So Use It to Your Advantage, Nathan Kaufman Sponsored by Epic

6

5:00 – 6:30p RECEPTION IN THE EXHIBIT HALL Sponsored by LIFT Healthcare

8:00 – 9:15a



Digital Transformation: Design Your Future

We don't have a choice on whether we digitally transform...the choice is how well we do it. The key is not only understanding digital trends—social media, IoT, AI, Blockchain, mobile, and more—but understanding how they work together. Leaders in this digital age are made, not born. Examine current and future digital trends to maximize your organization's impact.

Erik Qualman, Top Digital Transformation Expert, Futurist & Bestselling Author

10:15 – 11:15a

DATA STRATEGIES

Sponsored by Playbook for Health

Patient Loyalty: An Analytical Solution

Relationships between primary care providers and patients are more important than ever. But quantifying those relationships, as well as a patient's willingness to change providers, has been difficult. Examine a unique approach to assessing loyalty/likelihood to switch using claims-based analytics and propensity modeling. Hear how the answers can tie strategic growth and functional marketing together.

Milissa Holland, Director of Healthcare Coastal Cloud

Bill Moschella, CEO & Co-Founder Populi

11:30a – 12:30p

A Data-Driven Approach to Sponsorships

Sponsorship investment is on the rise across healthcare. Learn how to take a data-driven approach to evaluate partner alignment, negotiate agreements, and optimize tactics. Hear how analytics can guide sponsorship strategy and activations across marketing, recruitment, fundraising, and more.

Patricia Bell, AVP, Global Brand & Strategic Partnership Marketing Penn Medicine

Amy Comeau, VP, Marketing, Emory Healthcare

Jimmy Phillips, VP, Marketing & Communications Kettering Health

Michael LaPorta, President, Playbook for Health

2:15 – 3:15p

We Finally Have CRM! Now What?

With no prior CRM infrastructure or experience, UCSF Health established an enterprise platform. Learn how marketing can be a strong partner for digital transformation across the organization. Hear how to unify datasets, including EMR, CRM, CMS, MSO, and platforms for engagement and marketing automation. Examine the challenges, wins, opportunities, and impact on customers.

Molly Busch, CRM Campaign Manager and

Kellie Spellman Davis, CRM Marketing Strategist

Marc Fredson, Director, Marketing Operations, Technology & Analytics, UCSF Health

4:00 – 5:00p

Achieve Population Health Goals with CRM & Marketing Automation

Emory Healthcare's marketing team helped the system meet the population goals of its clinically integrated network by using CRM and marketing automation tools. Three months after the launch of automated campaigns to achieve shared savings and quality gaps, the system booked more than 1,100 annual wellness visits, with efforts for mammography and colonoscopy to follow. Hear how!

Amy Comeau, VP, Marketing and

Jared Johnson, Senior Manager, CRM Analytics Emory Healthcare

ENGAGEMENT STRATEGIES

Sponsored by IQVIA

Personalization vs. Privacy: Balancing Ethics & Compliance

With so much information available to marketers, and increased demand for personalized marketing, how do you ensure your targeting and segmentation approaches are not only effective but also compliant? Join your colleagues to examine best practices.

Jeremy Rogers, Executive Director, Digital Marketing & Experience Indiana University Health

Sarah Sanders, Chief Marketing & Brand Experience Officer, UCSF Health

Thomas Ingalls, JD, Member, Cozen O'Connor

John Simpson (Facilitator), Co-CEO & Co-Founder, Digital Health Strategies



Omnichannel Engagement & Healthcare's CX Balancing Act

Meeting consumer expectations for personalized, omnichannel engagement can be a challenge in healthcare. Hear how St. Luke's digital approach is meeting the challenge, as well as reinforcing brand values such as non-discrimination, exceptional patient experience, and community health.

Cindy Graham

Director of Digital Strategy St. Luke's Health System

PHYSICIAN RELATIONS & SALES

Sponsored by Marketware

Reduce Referral Leakage with Analytics

Using data from internal systems as well as third-party claims, this organization has developed a process for successfully tackling referral leakage. Examine the process, which identifies leakage points, targets efforts where they are most needed, and uses performance data to measure results. Hear how alignment is hardwired and enforced.

Josh Cameron

Executive Vice President Marketware, A Division of Medsphere

Emory's Data Journey: Lessons & Pitfalls

Over the past 12 years, Emory Healthcare has advanced its level of data sophistication, moving from macrolevel, hand-collected data to sophisticated microlevel data gathered from multiple sources. Examine the journey, including how to gain organizational buy in for data validity and operational support for addressing issues uncovered by data. Learn how to avoid common pitfalls.

Lori McLelland, RN

Corporate Director, Integration Outreach Emory Healthcare

Aviva Zupancic

Director, Healthcare Analytics Offerings, IQVIA

12:30 – 2:00p LUNCHEON KEYNOTE, You Can't Fight Gravity, So Use It to Your Advantage, Nathan Kaufman Sponsored by Epic

5:00 – 6:30p

RECEPTION IN THE EXHIBIT HALL Sponsored by LIFT Healthcare

Accelerate the Time to Physician Engagement

Ochsner redesigned its physician engagement approach to become a leading regional referral destination. Learn how decision factors research, best practice benchmarking, and insights from gaming were used for executive buy-in, improved execution, and quicker impact. Examine results from their first campaign, highlights of their multi-faceted physician engagement strategy, and how they're using technology.

Courtney Patrick, Marketing Manager Ochsner Health

Ryan Nash, President

RTRN Strategy, an Endeavor Management Company

Money is Tight: Challenges & Actions for Your Referral Program

The current environment has previously high-performing organizations struggling to meet financial goals. What's the role of the physician relations team? This off-the-record, interactive discussion will shine a light on the challenges and how teams are responding.

Laurel Hopkins, Executive Director, Market Development Virginia Mason Franciscan Health

David Stephens, SVP, Strategy & Development Hackensack Meridian Health

Kriss Barlow (Facilitator), Principal Barlow/McCarthy



8:00 – 9:15a



Make the Case for Anything – and Get It

Whether you're in marketing, communications, sales, or leadership, you have to make the case for your ideas, your services, and yourself every day. Making the case is advocating. It's helping people believe. And it's a vital business skill. In this keynote, you'll learn how to turn anyone, even your adversaries, into your advocate – leading to more referrals, more testimonials, and more word-of-mouth marketing.

Heather Hansen, Advocacy Expert, Coach & Bestselling Author

STRATEGIC MARKETING

Sponsored by Wolters Kluwer

A Market Development Plan for Growth

UT Southwestern worked with a cross-functional team including Strategy, Physician Outreach, Marketing, and Operations to develop a Market Development Plan for growth. Hear how to identify key stakeholders to drive collaboration, as well as to bring alignment to the Clinical Strategic Plan. Review a tracking system for process, prioritization, and accountability.

Alan Kramer

Associate VP, Health System Emerging Strategies & Market Development

and Pamela Zippi

Assistant VP, Market Development Strategy
UT Southwestern Medical Center

COMMUNICATION STRATEGIES

Sponsored by Revive

Stay Tuned

INTERACTIVE & DIGITAL STRATEGIES

Sponsored by Reason One

Leverage SEO to Drive Patient Acquisition & Satisfaction

With over 70% of people consulting Dr. Google to find health information, it is increasingly important to understand Google's constantly changing algorithms and how it surfaces results. Hear how Beacon Health leveraged technology to drive significant SEO improvements by understanding Google and the "Google machine." The results? Increased patient satisfaction and acquisition.

Matt Klawitter

Senior Digital Strategist, Beacon Health System

Carrie Liken

Head of Industry, Healthcare, Yext

9:30 – 10:30a

Stay Tuned

Managing the Partnership Implications of Rebranding

Rebranding can clarify and deepen partnerships, ensuring connection with patients and employees. Hear proven ways to engage with partners that will gain their support and encourage cooperation. Learn how to manage the complexities that arise when multiple entities provide care and service from a single location while maintaining brand integrity.

Holly Sullivan, VP, System Brand & Marketing
Corewell Health

Donna Lee Ubertalli, VP, Marketing & Digital
Channels, Dana-Farber Cancer Institute

Philip Guiliano, Partner, BrandActive

UTSW Digital Strategy to Execution

UTSW set out to build a unified digital experience by integrating their key patient-facing applications, including MyChart, Find a Provider, Video Visits, Wayfinding, and more. Learn more about their strategy to get buy-in from internal stakeholders, journey to implementation, and adoption efforts that led to over 50,000 users, 1,000 reviews in the app store, and a 4.8 star rating in the first few months after rollout.

Chelsea Landon

Director, Health System Emerging Strategies
UT Southwestern Medical Center

10:45 – 11:45a



Let's Talk Sessions

Increasingly, the issues facing healthcare marketing, communications, digital, and physician relations executives change in the blink of an eye. Now more than ever, sharing and learning from your colleagues is key. To that end, the HMPS23 agenda features a number of Let's Talk Sessions, facilitated sessions led by seasoned healthcare executives and designed for interactive dialogue. Look for the Let's Talk symbol and join in the off-the-record conversation!



New Attendee Meet & Greet!

Are you new to HMPS? Are you wondering how to maximize your experience? Join Advisory Panel members and faculty at the New Attendee Meet & Greet on Monday for lunch and talk!

Sponsored by Carvertise

Morning Rounds: Managing Your Career

Looking for career advice? Reserve your spot for a 1:1 confidential conversation on anything from career advancement to effective mentoring, from resume review to current marketplace dynamics. Hosted by principals from The Ward Group, a retained executive search and organization consulting firm, these 20-minute discussions will run consistently throughout Monday and Tuesday in a private meeting space. Scan the QR code to sign up!



Summit Scholarships prairie dog

Interested in attending HMPS23 but don't have the budget?

Apply for a Summit scholarship sponsored by Prairie Dog:
www.healthcarestrategy.com/summit/scholarships.

8:00 – 9:15a



Make the Case for Anything – and Get It

Whether you're in marketing, communications, sales, or leadership, you have to make the case for your ideas, your services, and yourself every day. Making the case is advocating. It's helping people believe. And it's a vital business skill. In this keynote, you'll learn how to turn anyone, even your adversaries, into your advocate – leading to more referrals, more testimonials, and more word-of-mouth marketing.

Heather Hansen, Advocacy Expert, Coach & Bestselling Author

DATA STRATEGIES

Sponsored by Playbook for Health

Data Engages Providers in Patient Experience

Observational research harvests stories rich in facts and feelings that shed new light on patient ratings...and physicians listen! Examine the use of mystery shopping data to engage providers in real solutions that elevate the patient experience. Documenting facts and feelings, mystery shoppers hold up a mirror on people, processes, and environmental factors that either build or erode trust. Hear how!

Jean Bunker, VP, Marketing, Communications & Physician Relations
MedStar Medical Group

Kris Baird, President/CEO, Baird Group

ENGAGEMENT STRATEGIES

Sponsored by IQVIA

Elevate Experience with Unified Data & Personalization

Summit Health is using a customer data platform and personalization to shape a successful enterprise-wide digital engagement strategy based on unified customer attributes. Hear how unified data helps Summit Health deliver the right message to the right person at the right time, build targeted audience segments for personalized messages, and retarget patients and consumers for relevant services.

Andrew Chang, VP, Marketing
Summit Health

Ben Seyden, Executive Strategist
Salesforce

PHYSICIAN RELATIONS & SALES

Sponsored by Marketware

Boost Pediatric Referrals with Content

Does your referring physician content engage loyalists and splitters and lead to great relationships and volume growth, or does it need improvement? Learn how to gauge the strength of your content, identify gaps, and develop a strategy to capitalize on what's working and improve what isn't.

Teddi Marzofka, Clinical Content Specialist
Gillette Children's

Garland Stansell, Chief Communications Officer
Children's of Alabama

Nancy Vanselow, Senior Manager, Marketing Development, Children's Wisconsin

Shannon Cummins, VP, Business Development
GLC, part of SPM Group

9:30 – 10:30a

From Healthcare to Health: Personalization at Scale

Most healthcare organizations struggle to turn their extensive data resources into compelling experiences. Hear how to meet the challenges around adjusting personalized content and data to scale, access, self-service opportunities, and price transparency. Examine how to transform patient and member experiences to drive growth, engagement, and longer-lasting relationships.

Adam Rice
SVP, Marketing
CommonSpirit Health

Tom Swanson
Head of Healthcare Strategic Marketing
Adobe

How to Ensure Physicians Actually Care About Your Content

Physicians aren't your typical consumers. They're notoriously hard to reach, and getting your message seen, read, and digested can be a challenge. Learn how Catholic Health cracked the code on creating compelling content that captures physicians' attention and keeps them engaged. Hear the results.

Sumita Yadav
System VP, Operations & Cardiovascular Service Line
Catholic Health

Amit Phull
Medical Director & SVP, Strategy & Insights
Doximity

10:45 – 11:45a

Strategies for Field Success: Skills Matter

In relationship strategy, field staff must be able to connect with referring physicians. Learn techniques and innovations for success, including how to get through the door, prove your value-add, and gain internal traction. Examine field tested actions to fine-tune your gatekeeper technique, as well as strategies to create messages that resonate.

Donna Grider
Manager, Primary Care Physician Liaisons
and

Becky Lathrop
Director, Physician & EMS Liaisons
Indiana University Health

Penny Nichols, Physician Outreach & Referral Management Executive
Adventist Health

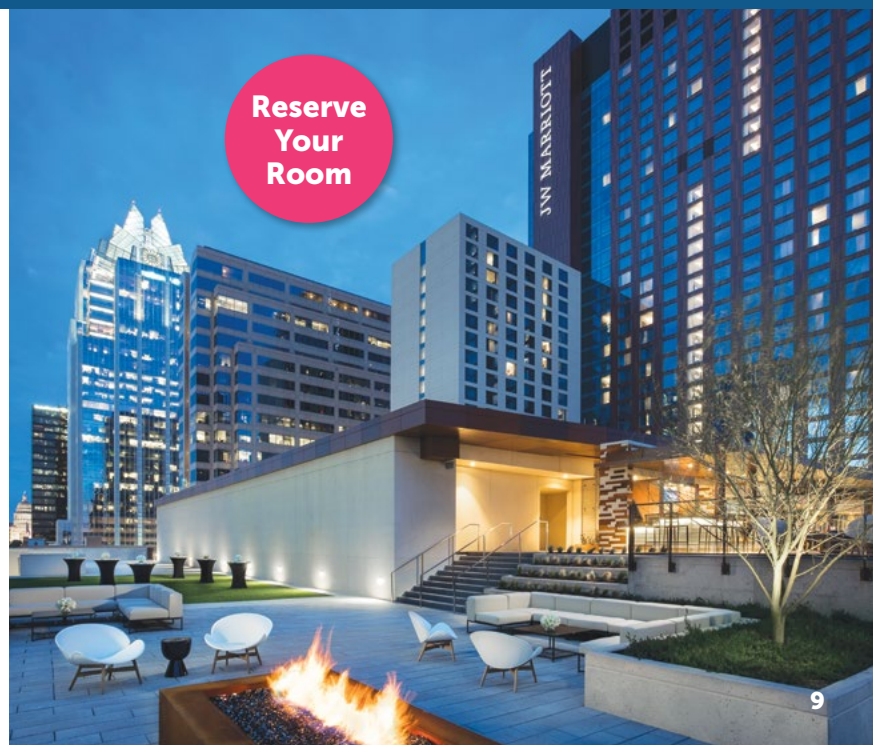
Visit the Forum at www.healthcarestrategy.com/register to register online.

Hotel Information

The official hotel for the Summit is the **JW Marriott Austin**. Located in the heart of downtown Austin, the hotel is just steps from the best attractions, dining, and entertainment Austin has to offer.

To reserve a room at the special rate of \$295 single/double, **click here** or call the hotel at (512) 474-4777 and identify the meeting as the "Healthcare Marketing & Physician Summit." The room rate includes guest room Internet access, as well as Health Club access.

Be sure to make your reservations early! The room block will be released on March 24th, but is likely to sell out before that date.



Reserve Your Room

Summit Sponsors



Diamond Sponsor

Loyal is an end-to-end digital and AI-powered solution spanning the entirety of the patient journey. Guiding patients through every step of their omni-channel healthcare experience, we are the preferred solution among leading health systems. Advancing quality health is at the heart of everything Loyal does.



Platinum Sponsors

Actium Health is the CRM intelligence and patient activation engine that unleashes the untapped value of health systems' accumulated patient data, using sophisticated predictive analytics to generate prioritized next best actions and enable proactive, ongoing dialogue with every individual healthcare consumer.



Bowstring is a global, creative content studio specializing in offering brands and agencies strategic production solutions to deliver more high-quality content.



Coastal Cloud is a Salesforce Healthcare Expert Partner with deep experience with physician relationships, healthcare marketing, and patient consumer experience. Coastal Cloud has been awarded the Global Salesforce Partner Innovation Award in Customer Success for two years in a row.



Digital Health Strategies is one of the nation's leading healthcare fundraising solutions providers. Leveraging data science, digital technologies and creativity, we develop and implement innovative programs to solve the most complex marketing and fundraising challenges for some of the largest health systems in the country.



Doximity is the largest medical network with 1.8M+ verified members, enabling collaboration across specialties and every major medical center. Members can search and find clinicians, stay up-to-date with the newsfeed of medicine, exchange HIPAA-secure messages, and engage in telehealth visits.



If your organization uses **Epic**—meet Cheers, the CRM built for healthcare and Hello World for omni-channel communications. These new apps work with MyChart, the #1 healthcare app on Apple and Android, in the world's most-adopted integrated digital health platform.



We Engineer Success. Our passion is solving problems, delivering value and **LIFTing** up partner clients. We are healthcare marketers devoted to human understanding and best-in-class delivery. We are market makers—providing a range of data, intelligence, and services unavailable elsewhere.



Marketware's Physician Strategy Suite includes 4 web-based platforms designed to strengthen the competitive advantage for healthcare teams working in physician relations, analytics, recruitment and onboarding.



Modea is a healthcare digital consultancy focused on improving the patient experience by helping organizations establish and nurture strong relationships with their customers. We specialize in designing and building digital consumer experiences and providing digital transformation consulting for healthcare organizations.



NRC Health is committed to achieving Human Understanding and bringing healthcare organizations closer to their customers. Helping its partners design experiences that exceed expectations, inspire loyalty, and improve well-being, NRC Health is enabling organizations to understand what matters most to each person they serve.



Populi is an Analytics-as-a-Service company that makes access to Commercial Healthcare Analytics easy. We enable healthcare organizations to market and sell to patients, consumers, and healthcare providers, by delivering the analytics they need in the platforms they work in everyday.



Revive works with brands who lead the way in health—brands that drive transformation, make things better, shape the future of health. We deliver success by building brand, marketing, advertising, and communications solutions that are effective today and prepare our clients for tomorrow.



Platinum Sponsors, cont.

Salesforce is the global leader in customer relationship management (CRM), bringing companies of every size and industry closer to their customers. Salesforce enables companies to leverage cloud, social, mobile, AI, and connected products to engage with their customers in new ways, all on one integrated platform that spans sales, service, marketing, commerce, communities, and industries.



Gold Sponsors

For 30+ years, **Carenet Health** has pioneered advancements in consumer experience by offering the most comprehensive solutions. We integrate human touch with digital innovation to make healthcare better for everyone.



Carvertise is revolutionizing the way brands communicate with consumers outdoors. By leveraging a network of over 550,000 registered rideshare drivers, Carvertise is turning Uber, Lyft, and DoorDash cars into moving billboards for healthcare organizations across the country.



Enqbator creates digital solutions, from websites and mobile applications to custom portals and integrations. We're proud of our healthcare partnerships and our dedicated team is ready to work for you.



We're **Fathom**—digital marketers who believe strong strategy starts with deep roots. We partner with CMOs and marketing leaders at top hospital systems to measure and maximize their digital impact.



IQVIA is a leading global provider of advanced analytics, technology solutions and clinical research services to the life sciences industry dedicated to creating intelligent connections that deliver unique innovations and actionable insights.



Julia Balfour, LLC solves problems. Design, development, and branding—traditional or way outside the box, we inspire change in every way.



LionShare's exclusive platform ignites CRM efforts to create sophisticated, automated marketing and relevant conversations, resulting in quantifiable ROI, marketing objectives met, and your efforts proven. As your partner, we create measurable, data-driven marketing efforts with unmatched support and unmistakable smarts.



Monigle is a creative experience company fueled by humanizing brands that move people. Our teams create and deliver powerful brand experiences across a spectrum of services, including insights, strategy, creative, culture, activation, branded environments, and BEAM.



Optum is evolving health care so everyone can have the opportunity to live their healthiest life. Together, for better health.



As healthcare deepens engagement and investment into sports and influencer marketing, **Playbook for Health** supports healthcare systems with the data, analytics, insights and activation to optimize their sponsorship and partnership investments.



Primacy is a data-inspired, full-service digital experience agency. We create smarter healthcare experiences that connect with people during meaningful moments.



Reason One is a full-service digital agency helping health systems create better digital experiences through consumer-centric digital strategy, technology, tools, and processes that serve both patients and teams.



Reputation is a unified platform to drive provider selection, connect patients with doctors and improve care with deep insight into patient feedback!



Verato, the identity experts for healthcare, enables smarter growth, improved care quality, and better population health by solving the problem that drives everything else—knowing who is who™. Get identity right from the start, visit Verato.com.



Wolters Kluwer is a provider of information, business intelligence, and point-of-care solutions for the healthcare industry. Serving 180+ countries, Wolters Kluwer's customers include professionals in medicine, nursing, and allied health.



Silver Sponsors

Marq enables your organization to deliver on-brand communications across all locations and guarantee compliance on all patient material through a centralized platform that empowers employees to tell your brand story.

Prairie Dog begins each conversation with curiosity. Because the first step to solving your business problem is to be sure we're solving the right problem. We then set out to solve it with marketing discipline and flair. Every day since 1996.

SXM Media reaches the largest addressable audience across digital audio—music, sports, talk, and podcasts. Together, Pandora, SiriusXM, and Stitcher Podcasts reach half of all Americans. 88% of its 150M listeners listen with ads, allowing healthcare marketers to reach and connect with consumers at scale.

Bronze Sponsors



Supporting Sponsors



Healthcare Marketing & Physician Strategies Summit

April 17 – 19, 2023

JW Marriott Austin
Austin, TX

1 Registrant Information

FULL NAME

FIRST NAME AS YOU WISH IT TO APPEAR ON BADGE

TITLE

ORGANIZATION

ADDRESS

CITY STATE ZIP

PHONE

E-MAIL

2 How Did You Hear About the Summit?

- Previously Attended Forum Website Online Search
- Brochure Word of Mouth Other _____
- Email Social Media

3 Which Category Best Describes Your Organization?

- Hospital/Health System Insurer/Health Plan
- Urban/Suburban Medical Group Practice
- Rural Vendor
- Academic Medical Center Consultancy
- Integrated Delivery Network/ACO Other _____

Cancellation Policy

The Forum guarantees a refund, less a \$400 administrative fee, if written notification is received on or before January 20, 2023. Verbal cancellations are not accepted. Cancellations received after January 20, 2023 are not eligible for a refund. You may always send a substitute.

Confirmation of Registration

All registrations will be confirmed within 3 days of receipt of the registration form and payment. If you do not receive a confirmation, please call 312-440-9080, ext. 23. Please do not mail forms without payment.

Privacy Policy

By registering for this event, you agree to receive emails from the Forum for Healthcare Strategists (the Forum) and to have your contact information, including email, passed on to the event sponsors and exhibitors for the purpose of following up on your interests. You may unsubscribe or change your email preferences through links in emails you receive. For more information, see the Forum's [Privacy Policy](#).

Photography Consent

By attending this event, I grant the Forum for Healthcare Strategists permission to use my likeness in connection with the advertising, promotion, and public relations efforts relating to the Summit in any and all media, now known or hereafter created, without any compensation to me.

4 Registration Fees

Early rates are available if the registration form with full payment is received by Friday, January 20, 2023. Discounts for group registrations (3 or more) are available for provider organizations. Please contact the Forum directly. All registrations for attendees from the same organization seeking discounts must be submitted together.

Summit Rates	Early	Regular
	received by 1/20/23	received after 1/20/23
Current Forum Member	_____ \$1,250	_____ \$1,395
Joining Member (Includes one-year Forum membership, \$225 value)	_____ \$1,495	_____ \$1,695
Non-Member (Does not include membership)	_____ \$1,525	_____ \$1,725

Total Due \$ _____

5 Payment Information

Your registration will be confirmed only after payment in full has been received.

- A check is enclosed, payable to Forum for Healthcare Strategists
- ACH Payment
(Call the Forum at 312-440-9080, ext. 23, for banking details)
- I authorize you to charge:
 VISA MasterCard Discover AmEx

NAME ON CARD

CARD NUMBER EXPIRATION

BILLING STREET ADDRESS

BILLING ZIP CODE

SIGNATURE

6 Get This Form To Us

Mail registration form(s) with payment to:
Forum for Healthcare Strategists
980 North Michigan Avenue, Suite 1090
Chicago, IL 60611

Register online at: www.healthcarestrategy.com/register



forum FOR HEALTHCARE STRATEGISTS

980 North Michigan Avenue
Suite 1090
Chicago, IL 60611

Tel: 312-440-9080
www.healthcarestrategy.com

— 28TH ANNUAL —

Healthcare Marketing & Physician Strategies

Summit

APRIL 17–19, 2023 | AUSTIN, TX

Early Registration Savings End January 20!

For 28 Years, the Leading Summit on Market-Driven Healthcare Strategy

ACT TODAY!
Early Registration
Savings End
January 20!

Connect with Your Colleagues

