IQVIA & MAYO CLINIC

Rethinking Growth: Why HCP marketing is patient acquisition marketing

Anissa Blanshan, MBA/MHA — Mayo Clinic
Stacy Compty — IQVIA Health System Solutions

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Introductions



Anissa Blanshan, MBA/MHA
Sr. Marketing Manager – Medical Professionals
Mayo Clinic



Stacy Compty
Leader, Customer Experience & Delivery
IQVIA Health System Solutions

What We'll Explore Today

01 Why HCP Marketing Is More Important Than Ever

02 How HCP Marketing Drives Patient Acquisition

03 Practical Lessons from Mayo Clinic



Mayo Clinic & IQVIA



Mayo Clinic
Mission & Vision

Mission Statement: Inspire hope and promote health through integrated clinical practice, education, and research to provide the best care to every patient.

Vision Statement: To transform medicine to connect and cure as the global authority in the care of serious or complex disease.

World's largest integrated, nonprofit medical group practice.

Consistently ranked as the number-one hospital and top-performing healthcare organization in the world.

Campuses in Minnesota, Arizona, Florida and London.

Known for team-based care, clinical excellence, innovation, education and research leadership.

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We Are All Bound by the Same Operational Realities

MYTH 1:

Mayo Clinic doesn’t have to market

Reality: Reputation helps, but reputation alone doesn't drive the right referrals, appropriate referrals, or physician confidence. Mayo still has to educate providers on why a patient should come to Mayo.

Every health system, must communicate value and expertise.

MYTH 2

Top brands win referrals

Reality: Insurance networks, geography, access, and existing provider relationships heavily influence referral decisions. Physicians generally prefer to keep patients local whenever possible.

Referrals are driven by practicality and trust, not just reputation.

MYTH 3

Physicians know to refer

Reality: Even Mayo sees situations where physicians know Mayo treats a condition but don't know *when* a referral is appropriate or what specialized capabilities exist.

Health systems overestimate provider awareness.

MYTH 4

Large Systems = Clarity

Reality: Mayo is constantly managing attribution, NPI matching, data quality, APP targeting, personalization, and measurement.

Every health system is trying to solve many of the same growth and measurement problems

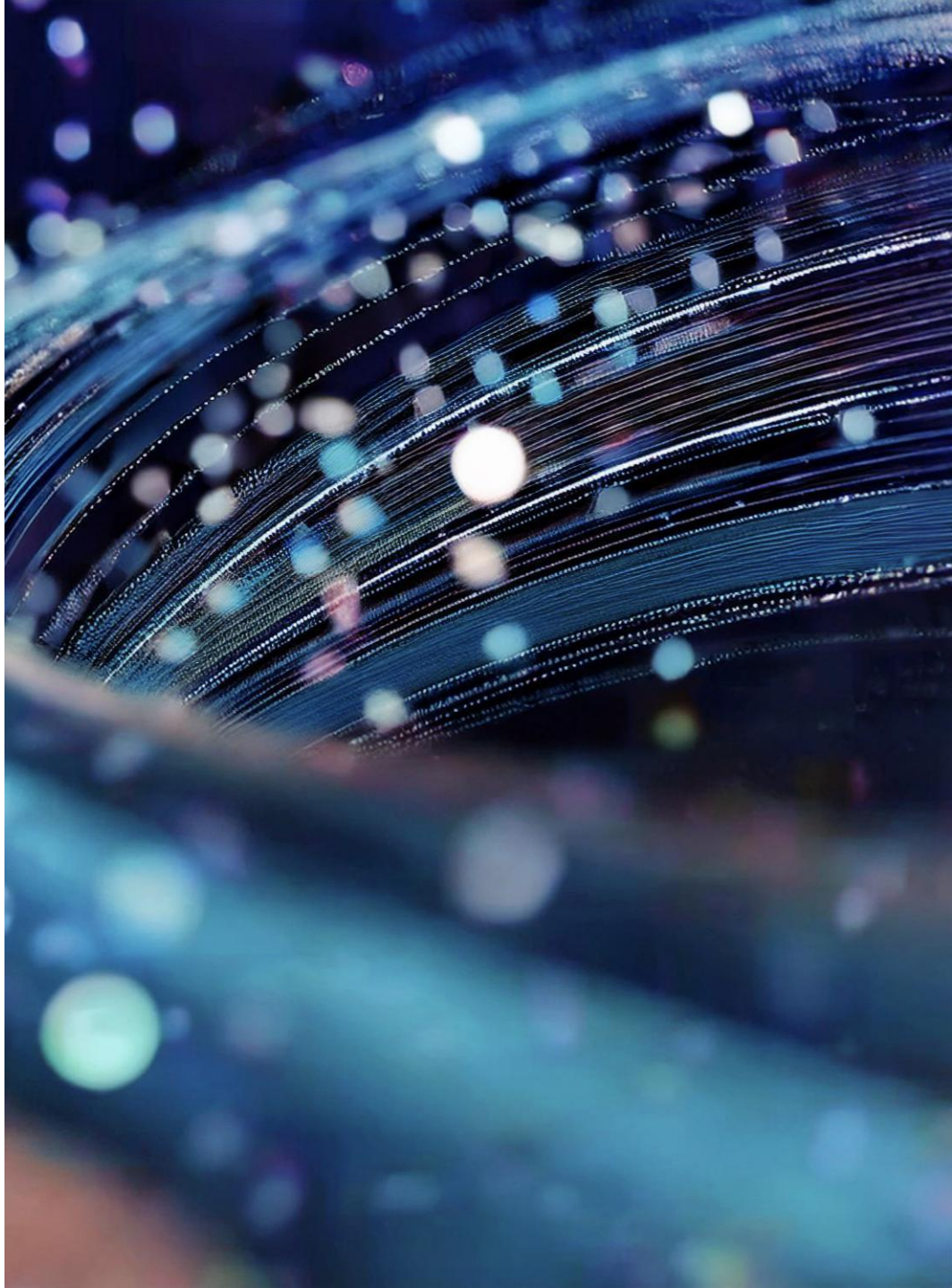
IQVIA

Health System Solutions

Global leader in healthcare data and intelligence, anchored by the nation's leading HCP data asset.

Supporting health systems with market intelligence, HCP engagement, and consumer marketing.

More than 100 health systems partner with IQVIA including 17 of the top 20 U.S. News-ranked organizations.



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The Case for Healthcare Provider Marketing





Physician referrals remain the most trusted source of healthcare information.

80%

of patients would stay with their preferred physician and receive care at that physician's affiliated hospital.

4.0/5

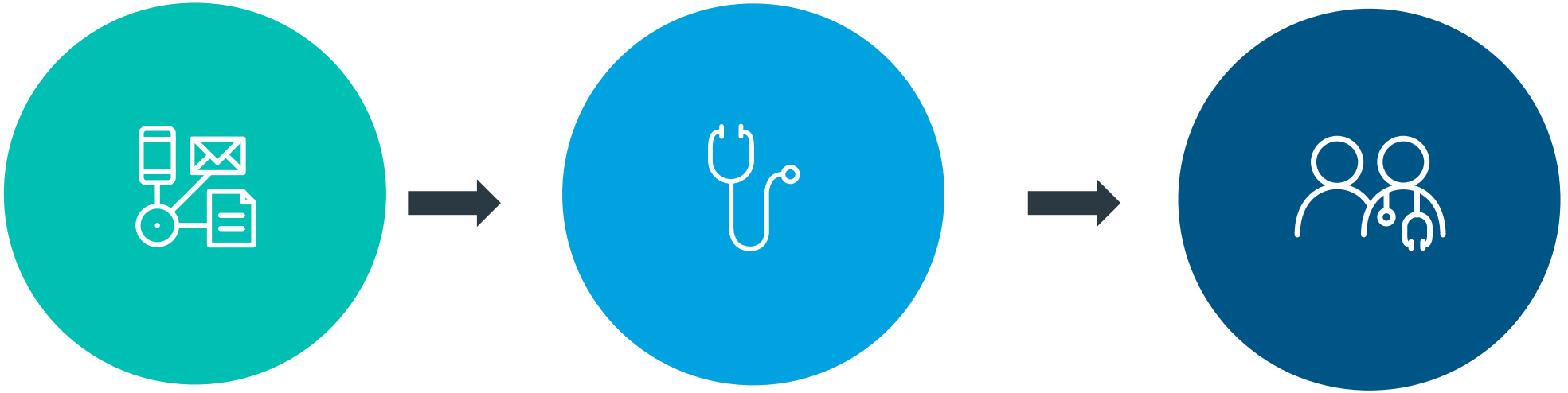
Physician recommendations earned the highest trust rating among all hospital information sources surveyed, outperforming hospital websites, online directories, AI tools and social media.

Source: U.S. News & World Report, 2026 Patient Survey

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HCP Marketing Is Patient Acquisition Marketing

Consumer marketing creates demand. Providers help determine where that demand goes.



Consumer Marketing Influence

- Builds awareness
- Creates demand
- Encourages action

Current Care Team Influence

- Validation of action
- Understands the clinical next action
- Recommend/refer

Patient Care Decision

The Evolution of Healthcare Provider Marketing



Why HCP Marketing Must Evolve

Three market shifts are changing how health systems drive growth

01

The Referral Network Is Changing

APPs are becoming increasingly influential in patient access, referral decisions, and care navigation.

02

Competition Is Increasing

Reputation alone is no longer enough to differentiate specialty services and drive referral growth.

03

Growth Expectations Are Rising

Health systems are increasingly expected to connect provider engagement to patient acquisition and service line growth.

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Disruption Journey: Patient Acquisition via Provider Referrals

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The Real Patient Acquisition Journey



Patient Need

Trusted Care Team

Referral Decision

Health System Entry

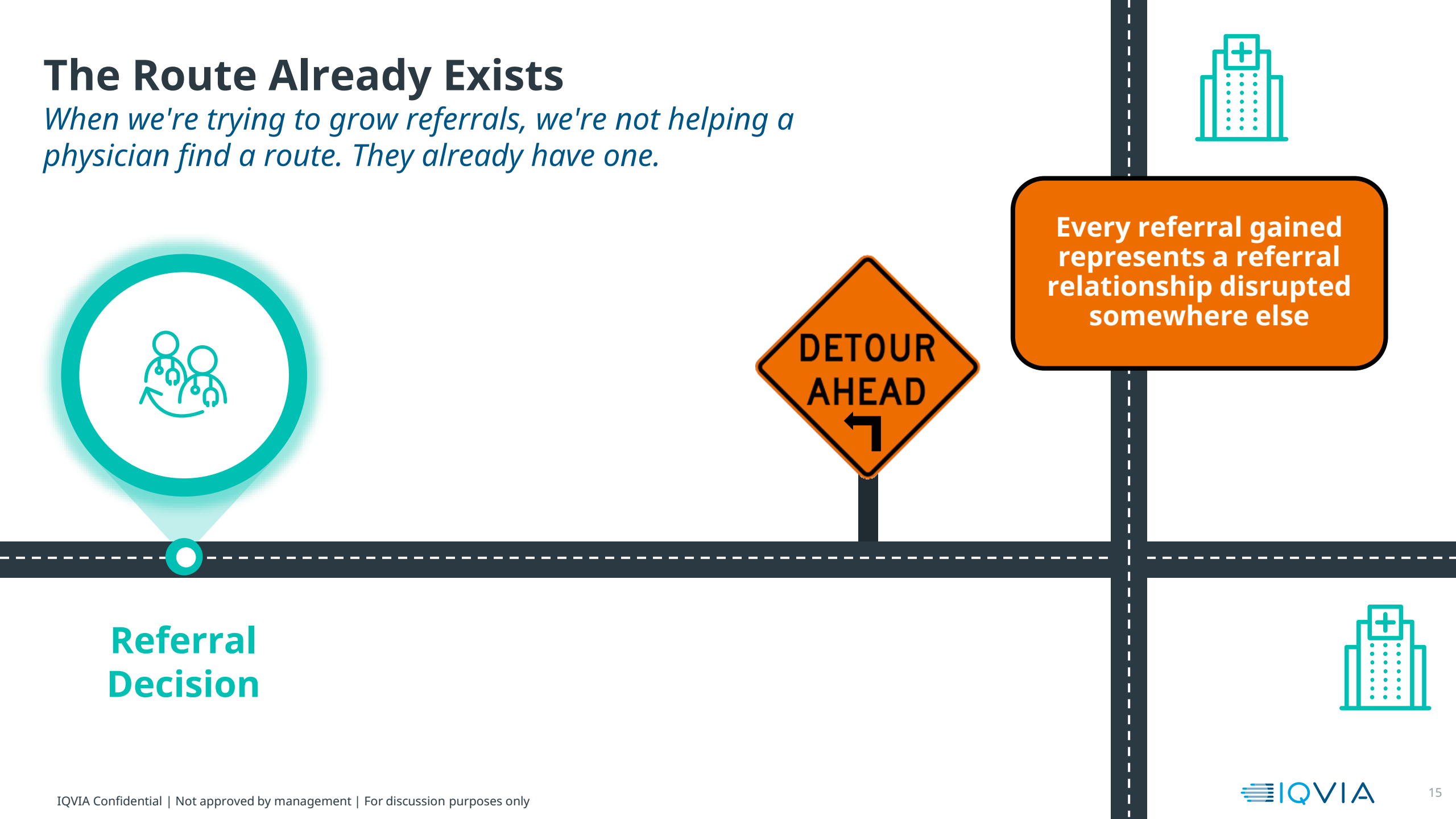
Care Delivered

⊗ **The question isn’t: "Will the patient choose us?“**

✓ **The question is: "Will the patient’s care team recommend us?"**

The Route Already Exists

When we're trying to grow referrals, we're not helping a physician find a route. They already have one.



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Disrupting a Referral Habit

A referral into your organization is a leap of faith for the referrer

Expertise

“Can they provide the right care?”

Access

“When can they see my patient?"

Experience

"Will my patient have a good experience?"



Communication

"Will they keep me informed?"

Convenience

"Is this the easiest path for my patient?"

Trust

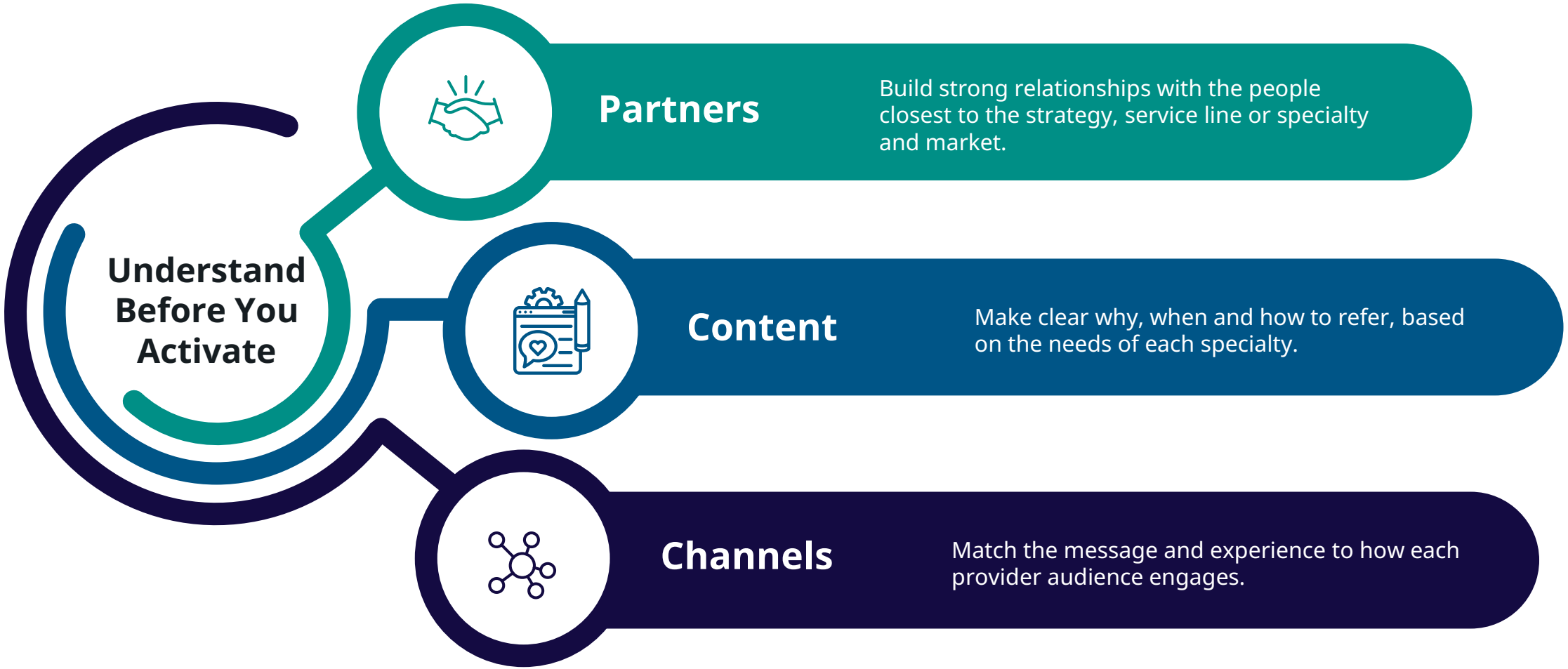
"Do I trust this organization and its physicians with my patient?"

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Learning from Mayo Clinic

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Three Lessons from Mayo Clinic



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Regardless of size or reputation, effective healthcare provider engagement requires understanding the people, information, and experiences that influence referral behavior.

Understanding The Wants & Needs Of Our Partners

Partners

Want: prioritization, measurable outcomes, focused growth

Need: Execute growth priorities and prove impact



Want: Service line growth, reputation, outcomes

Need: Credible promotion of clinical capabilities



Want: Stronger physician relationships, referral growth, influence

Need: Extend outreach, improve targeting, credible and compelling content



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Partners



Strategy leaders trust marketers who understand the business.

Show them how your marketing strategy and execution supports the strategic direction they have set for your system.

Clinical leaders trust marketers who understand their service line and their ideal patient profile.

Build trust through transparency. Understand the service line's priorities, capabilities, access realities, and growth expectations before developing the campaign.

Liaisons trust marketers who enable them through clinically-focused content and scale.

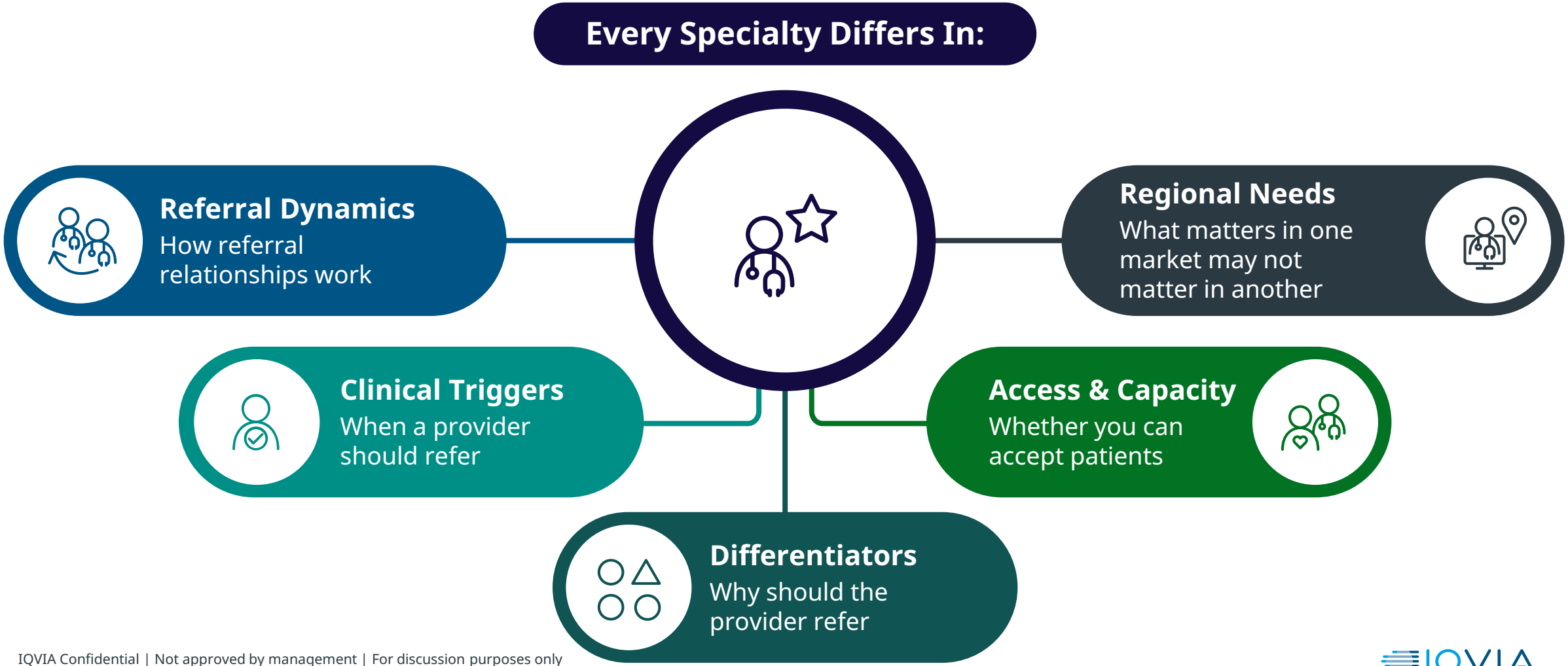
Bring liaison insight into campaign planning, then equip the liaison team to extend the campaign through direct follow-up and market conversations.

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Content

Every Service Line Has Its Own Personality

Effective HCP marketing is about understanding what HCPs need to know to confidently refer to each specialty.



Content

What HCPs Don’t Know…Can Hurt Us

Clarity is part of the referral experience



Why should the HCP refer?

Be specific about the clinical differentiation and the patient situations for which your health system offers added value.

Clinically, when is the right time to refer a patient?

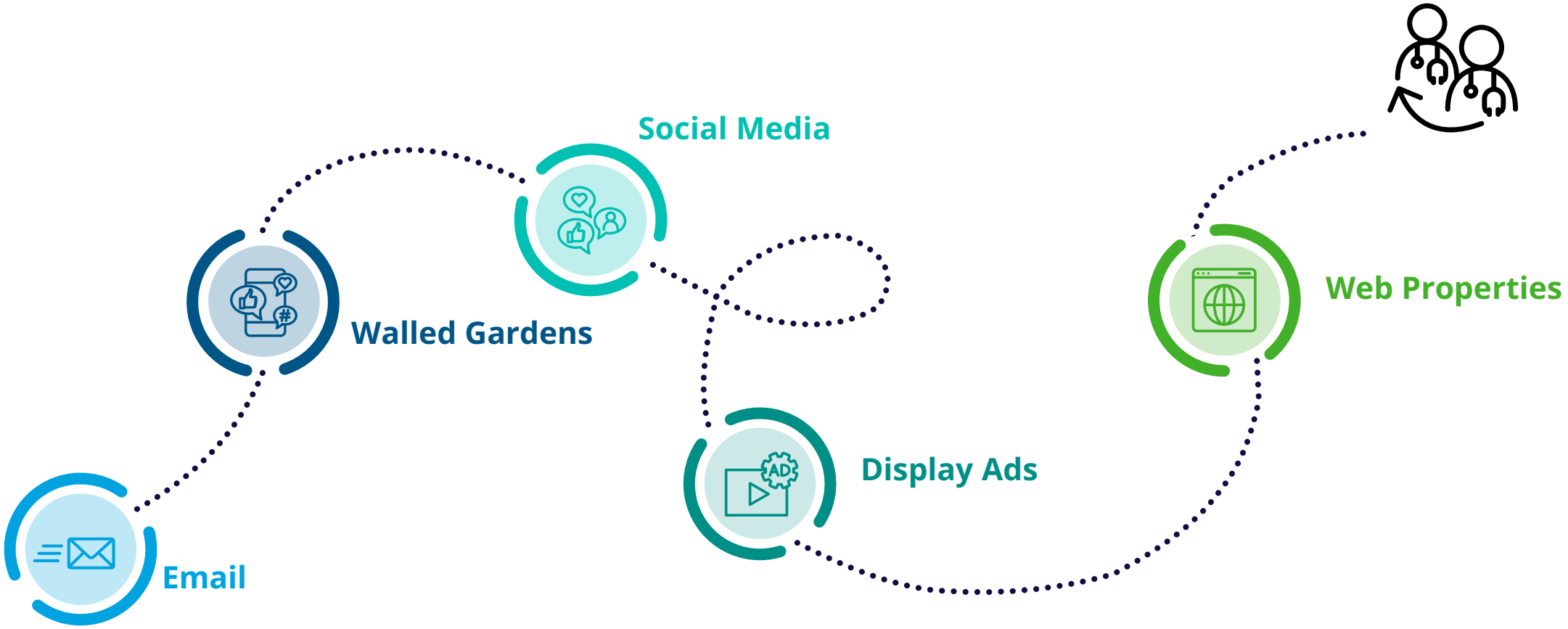
Clarify the clinical triggers, timing considerations, and access realities.

How does the HCP make a referral?

Make the referral process, destination, contact information, and next steps easy to find and understand.

Channels

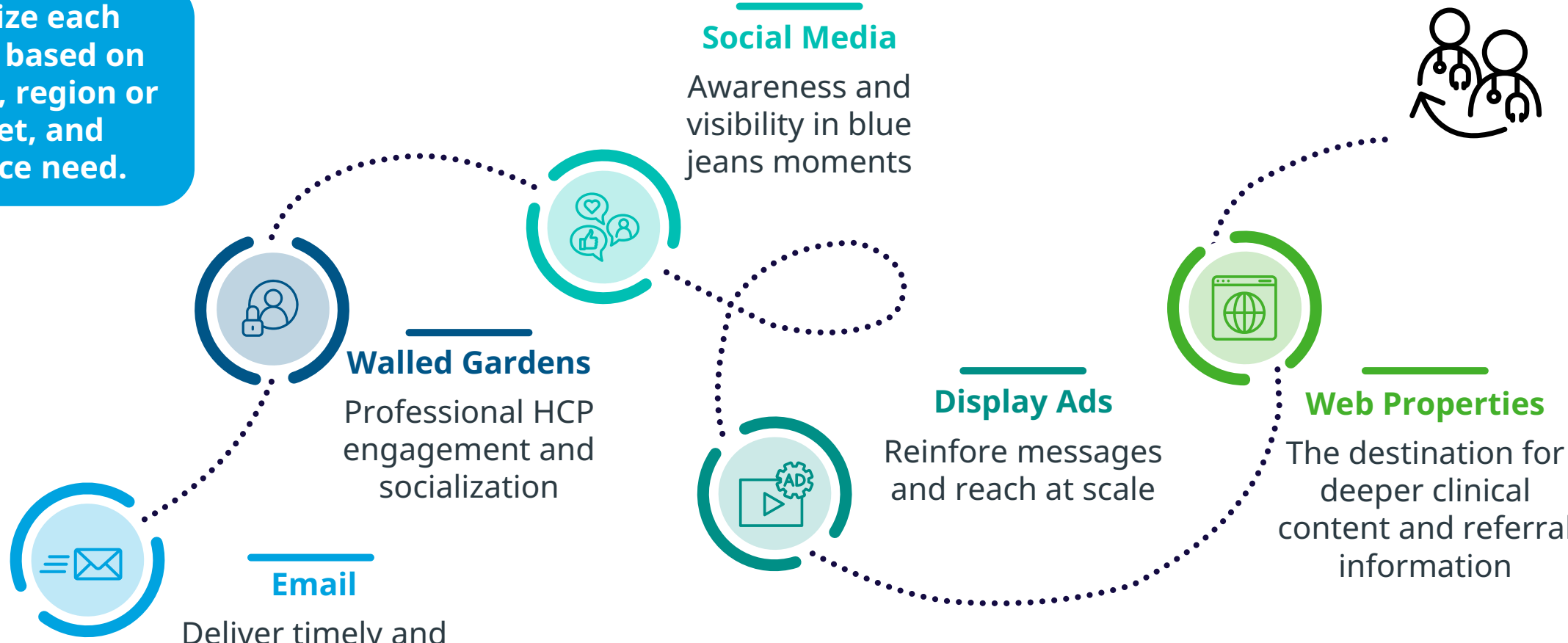
Every Channel Has Its Own Purpose



Apply Channels Based on Audience Need

The goal is to connect the right message to the right audience in the right environment.

Optimize each channel based on specialty, region or market, and audience need.



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Key Takeaways



HCP Marketing Is Patient Acquisition Marketing

Healthcare providers influence where patients receive care. Your HCP marketing strategies and campaigns should support referral confidence, patient acquisition, and service line growth, not awareness alone.

- Build intentional programs grounded in growth objectives.
- Referral behavior is earned through trust, relationships, and value.
- Everything you do should increase confidence in the referral experience.

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Questions

Thank You & Connect With Us



Anissa Blanshan, MBA/MHA

Sr. Marketing Manager – Medical Professionals

Mayo Clinic

anissa-blanshan-a602ab8/



Stacy Compty

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IQVIA Health System Solutions

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