Telehealth Marketing Plan Development

A Step-by-Step Guide

CALIFORNIA TELEHEALTH RESOURCE CENTER

Part of **OCHIN**

California Telehealth Resource Center

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INTRODUCTION

There are many ways to prepare a telehealth marketing plan. Some plans serve as a high-level strategic overview. Others are built around detailed analytics that carefully assess market segmentation, audience targeting, industry positioning, and more.

Trying to choose the right scope and format for your plan can be incredibly time-consuming. This is not the kind of challenge you welcome when your main focus is actively driving telehealth awareness, increasing utilization, boosting program reputation, and propelling long-term growth.

This guide takes a different approach. It features a template you can easily adapt and modify to suit your specific program needs. That makes it useful and versatile for many different program types—from small rural clinics, to large community hospitals, and practically everyone in between.

Let's start by assuming that fictitious XYZ Regional Medical Center (RMC) has already received approval to start its telehealth program. XYZ RMC's marketing plan becomes a key component in a broader strategy geared toward successful long-term program implementation and sustainment.

Find XYZ RMC's sample plan included in this guide, starting on **page 8**. You can customize the various sections to fit your own unique situation. We start by explaining the purpose *behind* each section, so you can decide exactly how much to include. Substitute your program's specific details and figures, and have a usable marketing plan ready to go in no time.

Need some effective insights about promoting your telehealth program to current and prospective patients, or the community at large? Those are included as well, starting on **page 29.**

If you would like additional support, call the California Telehealth Resource Center (CTRC) toll-free at **877-590-8144.** You can also visit **caltrc.org** for a wide range of telehealth insights, no-cost training tools, and unbiased resources designed to help you work smarter. If a certain approach has worked especially well for you, please share it with us!

PLAN COMPONENTS

The overview below describes some of the key sections you should consider including in your marketing plan. They are grouped by general purpose and function, to help you decide what works best for your individual circumstances. Including every segment shown verbatim is not necessarily required. Remember, you want to give readers an overall sense of strategic context and tactical execution.

Prefer to create your own marketing plan from scratch? These descriptions can guide your process. If you get stuck for ideas, try using the **Sample Marketing Plan** provided later in this guide. Just copy and modify the XYZ RMC illustrative text to suit your needs. Key plan components are as follows:

1 ESTABLISHING CONTEXT

➤ Executive Summary
This section is intended for busy executives and lead stakeholders who do not have time to read through the entire marketing plan. They can determine goals, audience targets, budgetary allowances, key activities, and performance metrics by skimming this summary. It's usually brief, and often bulleted.

➤ Introduction
This brief section summarizes what your marketing plan will cover. It can introduce telehealth program goals, mention reasons for putting the plan together, and provide general context for the various other sections.

➤ Background
This section adds a bit more business context. Describe the circumstances within which your marketing activities will take place. What have you accomplished to date? What new products and/or services are being provided? How do these fit into your broader service offerings?

PLAN COMPONENTS, continued

(2) OUTLINING GOALS

➤ **Strategic Objectives**
This section lays out specific, measurable goals related to the telehealth product or service you offer. Your operational, marketing, and technical strategies support these primary objectives. For business goals, consider addressing categories like financial concerns, market share/leadership, reputation, mission, and operational effectiveness. For clinical goals, consider addressing patient care, clinical support, and participation. Wherever possible, explain how success metrics will vary from one year to the next.

➤ **Marketing Objectives**
Describe the key goals of your marketing activities. Just as with the broader strategic objectives, include success metrics for each marketing initiative.

➤ **Marketing Strategy: Overview**
This section summarizes the major elements of your marketing strategy. Subsequent sections will explain these elements in greater detail, adding market analysis that supports strategic direction. These core elements are often labeled "Segmentation," "Targeting," and "Positioning." You can also consider using the descriptors "Market," "Message," and "Media." The labels you choose will drive the remainder of your marketing plan.

Marketing Points to Ponder:

In a 2020 survey, 46% of respondents said their main motive for choosing a telehealth visit was "safety." Overall, this represented an increase of just 13% from the previous year.

~ Source: **J.D. Power U.S. Telehealth Satisfaction Study**

PLAN COMPONENTS, continued

3 ANALYZING AUDIENCE

➤ **Market Analysis: Target Market**
Use this section to answer important questions like:
- Who is our target audience (i.e., who are we trying to reach)?
- How do we identify and segment this audience?
- Who are we targeting with each campaign and/or tactic outlined in our marketing plan?
- Why have we chosen these targets, versus others?

➤ **Market Analysis: Audience Pain Points**
Remember, the people you are trying to reach should identify with your message. Spend time assessing their challenges and/or needs. Next, identify the unique and singular ways telehealth could resolve those challenges and/or needs. Analyze each specific target market. Drill down to the "pain points" for each targeted group—the areas of discomfort you want to help them resolve. Also take into account alternate solutions that might exist, so you can clearly articulate the reasons why telehealth represents the better choice.

PLAN COMPONENTS, continued

(4) DETAILING APPROACH

➤ **Message**
Synthesize your market analysis elements into guiding messages that form the foundation of your marketing materials. Start defining the actual words and phrases you will use to address each audience. How is your program different than alternatives? What beneficial claims can you make and substantiate? Be sure all claims related to health care are defendable. For example, you cannot *guarantee* patient outcomes—but you can promote your solution as having *demonstrated* certain outcomes.

➤ **Resources**
Identify the resources available to support your key marketing activities. These elements might include people, spaces, budget dollars, raw materials, automobiles, storage areas, patents, partnerships, and/or databases. They are things that help you execute on time, within budget, and according to targeted goals.

➤ **Media**
What modalities will you use to convey your message—digital, print, video, social platforms, or something different? Explain why specific modalities or activities have been chosen over others.

Marketing Points to Ponder:

In a recent U.S. study, overall patient satisfaction with telehealth scored 860 on a 1,000 point scale. 52% of respondents said they faced at least one barrier to telehealth access.

~ **Source: J.D. Power U.S. Telehealth Satisfaction Study**

PLAN COMPONENTS, continued

5 DESCRIBING ACTIVITIES

▶ Marketing Activities: Summary

Provide an overview of key marketing activities. Include information that can help facilitate comparisons across each initiative. Begin with a description, and outline core objectives. Reiterate your target audience; then spell out frequency, resources, and essential metrics for success.

▶ Marketing Activities: Details

Some activities may require a longer explanation. For instance, if you are launching a new website or trying out a new social media platform, you may want to explain the different types of navigation, forms, and/or content you plan to include. You may wish to outline this in a phased approach (by month, or by business quarter).

6 SUMMARIZING NUMBERS

▶ Success Metrics

You should always aim for measurable results. This encourages your entire team to assess, learn, and adjust your approach over time. In this section, you want to point back to your marketing activities summary. Outline key success metrics in aggregate (since some metrics will be impacted by multiple activities). Explain the targeted value of these metrics, and the various activities contributing to each.

▶ Financials

Summarize the financial investment associated with your marketing activities. If possible, break this out in various ways—by month, by medium, and/or by capital costs versus operating costs.
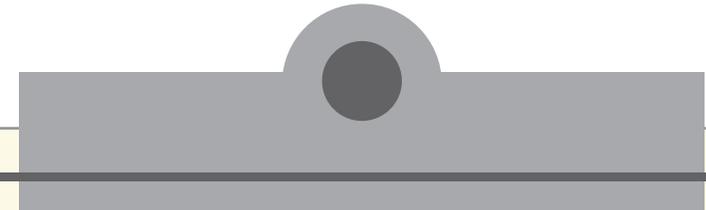
XYZ Regional Medical Center Sample Marketing Plan

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XYZ Regional Medical Center
Sample Marketing Plan

Executive Summary

Notes: This section is intended for busy executives who may not have time to review the marketing plan in its entirely. It therefore summarizes key details—including goals, target audience(s), budget, action items, and success metrics—in a shortened, easy-to-skim format.

This marketing plan is intended to increase the visibility, adoption, and use of new telehealth services for XYZ Regional Medical Center (XYZ RMC). Our marketing campaigns will primarily target:

- The patient community
- Referring providers
- Internal administration and staff

We will be working with an operating budget of $1,550 for the fiscal year ending in December. These funds will be invested in the following activities:

- Website
- Digital newsletter
- Brochures for patients
- Media activities—news releases, guest blogs, op-eds, and topical pitches
- Satisfaction surveys from patients, providers, and administration
- Social media campaigns

The following items will represent our primary measures of success:

- Targeted 1,000 website visitors per month
- Targeted 250 newsletter subscribers by Q2
- Targeted patient satisfaction score of 90% within the first year
- Targeted 75% of administrators able to identify at least three telehealth program benefits within the first six months
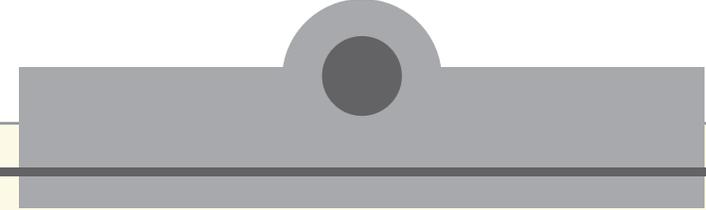
XYZ Regional Medical Center
Sample Marketing Plan

Introduction

This document describes the marketing plan for XYZ RMC's telehealth program. It covers marketing strategy, marketing tactics, success metrics, and financials. All major marketing activities are summarized and described in the Marketing Activities section for quick reference.

Background

Notes: This section provides marketing plan context. Describe the circumstances under which your marketing activities will take place. Summarize what has already been accomplished, and the product(s) or service(s) being offered. This puts your marketing plan into a larger business framework.

XYZ RMC has recently committed to participate in the California Telehealth Network (CTN). We will utilize CTN services to provide patients in Alphabet County with a new suite of clinical services via telehealth.

Our telehealth offerings will include both emergency and non-emergency services.
- **Non-emergency services**: cardiology, dermatology, gastroenterology, infectious disease
- **Emergency services**: neurology/stroke

Telehealth technology for broadband services and videoconferencing was originally obtained through grant funding from Generous Organization of America.

Strategic Objectives

Notes: While the above section provided business context, this section lays out specific strategic goals that can be measured. These goals should relate to the telehealth product(s) or service(s) you are offering. It is helpful to group related goals into categories (such as "business" and "clinical"). Your operational, marketing, and technical plans will ultimately support these primary goals.

We would like to encourage participation in this program so that XYZ RMC sees a return on its new investment—while in the process, providing better care for our valued patient population. Please review the following pages for details.

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Strategic Objectives: Business

Notes: Use this subsection to outline goals that involve financial concerns, market share, market leadership, industry reputation, facility mission, and operational effectiveness. Where possible, identify when these goals should be achieved and how success metrics will vary from year to year.

OBJECTIVE	TIME FRAME
The hospital's CEO, CMO, and CTO will be able to identify top benefits that the telehealth program is bringing to the medical center.	Within 6 months of program launch
Three external community organizations will have recommended the telehealth program to their members.	Within the first year
Patient satisfaction with the telehealth program will exceed 90%.	Within the first year
The telehealth program will earn positive media coverage.	Within 6 months of program launch
Measurable program-related return on investment (ROI).	Within the first year

Strategic Objectives: Clinical

Notes: Use this subsection to outline any goals applicable to the areas of patient care, clinical support, or program participation. Indicate your planned time frame, wherever possible.

OBJECTIVE	TIME FRAME
Achieve 100 telehealth encounters.	Within the first year
10 clinicians will obtain telehealth training and earn CE credit on topics related to our supported telehealth specialties.	Within the first year
We will change at least one patient's life by reducing wait time significantly, minimizing time taken off work to see a specialist, or providing a diagnosis that meaningfully alters the patient's outcome.	Within the first year
Clinician satisfaction with our telehealth program will exceed 80%.	Within the first year

XYZ Regional Medical Center
Sample Marketing Plan

Marketing Objectives

Notes: This section describes the marketing plan's key objectives. Just as with the broader strategic objectives, include success metrics for each marketing goal you indicate.

Our marketing efforts will support the telehealth program's broader objectives by:
- **Increasing program visibility and awareness**, both internally and within our community.
- **Driving internal program support.** Administrators will continue funding the program and advocating its use. Physicians, nurses, and other clinicians will utilize the program.
- **Driving use of our new telehealth services** by both patients and referring providers.
- **Growing our reputation** through media coverage, testimonials, and success stories.

Please see the section titled "Success Metrics" for specific measures of success, along with associated marketing activities and branding campaigns.

Market Strategy: Overview

Notes: This section summarizes the major elements that comprise your marketing strategy. Subsequent sections will outline these elements in detail, providing market analysis that supports your strategic direction. Most business schools suggest designating these major initiatives as "Segmentation," "Targeting," and "Positioning." You could also label your categories "Market," "Message," and "Media." Remember that the names you choose will drive other sections of your plan.

Our marketing strategy is designed around these three core elements:
- **Market**—to whom do we want to speak?
- **Message**—what do we want to tell them?
- **Media**—how do we want to get that message across?

Please see the next several sections for a detailed analysis.

XYZ Regional Medical Center
Sample Marketing Plan

Market Analysis: Target Market

Notes: To whom are you planning to speak? How will you divide up that audience? Who are the targets of your various marketing campaigns? Why have you selected those targets versus others? These are the types of questions to address in this section.

In **Figure 1**, we have identified numerous groups that could influence the use and reputation of our telehealth program. The size of each rectangle directly corresponds to *degree* of potential influence. Arrows indicate the *direction* of that influence. Based upon this illustration, it appears that the **Telehealth Director** could potentially impact multiple other influencers.

Although Figure 1 does not address this particular dynamic, it's worth noting that numerous entities actually influence the patient's decision to accept and use telehealth as an alternative to in-person care. Such influencers include the news media; various referring providers; and supporting organizations like employers, churches, and charities.

For our initial marketing strategy, we will select a few entities that seem to have the most direct influence on program awareness and successful utilization.
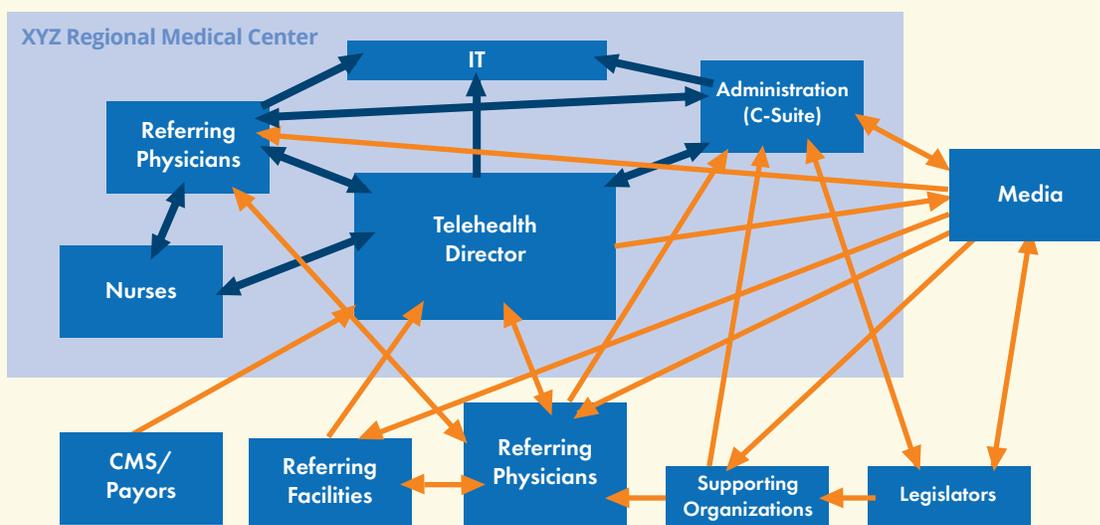
Figure 1
Key audience groups that could influence the use and reputation of our telehealth program.

XYZ Regional Medical Center
Sample Marketing Plan

Market Analysis: Target Market (continued)

The target audiences for our marketing efforts are:
- **Hospital administration and staff:** These individuals can help us execute our telehealth program through funding, advocacy, and program participation.
- **Referring providers:** We would like providers to participate by recommending our telehealth program to their patients. The group should consist of hospital staff members, referring primary care physicians, and/or clinicians at local nursing homes and long-term care facilities.
- **Supporting organizations:** These organizations will serve as channel advocates who promote our telehealth services to their members. They can include local employers, churches, charitable agencies, and patient advocacy groups that have close relationships with the community population (and therefore, potential insight into various health care challenges).
- **Patients:** Ultimately, we would like this group to take advantage of our telehealth services.

Figure 1 also suggests that local media can have a sizable influence on hospital administrators, legislators, supporting organizations, and referring providers. Our marketing strategy will therefore focus on leveraging media involvement to advocate for telehealth with these other key influencer groups.

Market Analysis: Challenges/Alternatives/Benefits

Notes: Once you have selected your marketing targets, consider what you want to tell them. Before making the potential mistake of jumping right into a discussion about telehealth, identify their specific challenges (i.e., "pain points"). Also consider the options they have for addressing these challenges. Then identify the unique ways your telehealth program can offer beneficial insights, alternatives, and/or resolutions. Make sure your analysis is specific to each target market. A generic effort does not normally assess pain points with enough specificity to identify persuasive advantages.

In this next section, we will review our key target audiences in terms of the challenges they (or their constituents) face. We will detail available alternatives for addressing those challenges. Then, we will outline the unique benefits our telehealth solution can bring to the table.

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Sample Marketing Plan

Market Analysis: Challenges/Alternatives/Benefits (continued)

This section is critical because:
- **Challenges** help us understand what is really troubling each target audience—and recognize what causes "pain" or stress to each particular audience. The way(s) our telehealth solution alleviates these challenges will translate into our main message points.
- **Alternatives** identify areas that directly compete with our telehealth solution. This helps us to assess our relative strengths and weaknesses, and to fine-tune our message points.
- **Benefits** represent key gains or advantages our various audiences perceive regarding the use of our telehealth solution. Several of these benefits may overlap across multiple audiences. Our ongoing objective is to identify benefits associated with relieving the challenges mentioned above.

Hospital Administration & Staff		
Challenges	**Alternatives**	**Telehealth Solution Benefits**
• It is difficult to attract specialized health care resources needed to serve the community effectively.	• Continue to provide the same limited level of health care services.	• Provides better health care services to the community.
• Hospital's fiduciary responsibilities are incompatible with the cost of providing highly specialized care.	• Sacrifice profits and/ or other expenses to hire additional specialists.	• Keeps patients at our facility, rather than transferring them out for specialized provider care.
• Patients from the community end up at more sophisticated care facilities, because they cannot be served at the RMC.	• Accept the ongoing risk that patients will choose to go elsewhere for their health care needs.	• Retains revenues for providing care to the local community.
		• Shows the community that its local hospital provides access to leading edge technology and services.
		• Demonstrates effective hospital stewardship.

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Market Analysis: Challenges/Alternatives/Benefits (continued)

Referring Providers		
Challenges	**Alternatives**	**Telehealth Solution Benefits**
• Patients need the help of specialists who do not practice in our local community. • Patient care plans and treatments are delayed due to lack of time, resources, and/or funds to see specialists with the necessary diagnostic expertise. • Some patients are lost to other providers and/or facilities, because those patients need to be referred out for care.	• Keep patients local, with limited access to specialists. • Send patients to distant facilities for care or treatment—which potentially impacts their quality of life due to long commute times, delayed appointments, or outright refusal to go.	• Allows patients to remain local and avoids unnecessary transfers. • Allows patients to see a specialist more quickly, potentially reducing wait times from months to days. • Facilitates faster diagnosis, thereby creating more effective patient treatment plans. • Uses technology on the leading edge of health care. • Retains patients and associated revenues.

XYZ Regional Medical Center
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Market Analysis: Challenges/Alternatives/Benefits (continued)

Patients		
Challenges	**Alternatives**	**Telehealth Solution Benefits**
• Lingering health care issues for which patients cannot receive local help. • Care delayed because patients cannot afford to drive hundreds of miles (or several hours) to see a specialist. • Care delayed due to lengthy specialist wait times of weeks or months. • Reluctance to travel long distances and potentially leave behind their support network if prolonged treatment is necessary. • Reluctance to put undue burden on support network, who may take time off work and/or travel long distances to be near patient.	• Try in vain to find a local practitioner who can help. • Delay care and live with the problem until the situation deteriorates, thereby requiring hospital admission and/or lengthy travel for specialized care.	• Provides access to specialists who don't practice locally, but have the skill set necessary to address the problem. • Eliminates or significantly reduces long wait times to see specialists. • Avoids expensive travel costs (time off work, gas money, mileage on car, time away from family, etc.) • Takes advantage of technology at the leading edge of health care.

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Sample Marketing Plan

Market Analysis: Challenges/Alternatives/Benefits (continued)

Supporting Organizations: Employers

Challenges	Alternatives	Telehealth Solution Benefits
• Employees struggle with health problems they cannot resolve, which impacts their well-being and/or productivity. • Employees take time off for sick leave, which disrupts shift schedules, decreases production, and/or increases costs.	• Let employees live with their health-related challenges. • Let their employers suffer the consequences. • Explore legal ways to replace these ailing employees.	• Helps employees stay healthier and more productive. • Reduces the need to take time off work for sick leave. • Increases reliability and predictability of employee attendance.

Supporting Organizations: Churches & Charities

Challenges	Alternatives	Telehealth Solution Benefits
• Members share health issues that are negatively impacting home/work life, and the organization is unable to recommend helpful community resources.	• Provide consolation and resources to help patients deal with various symptoms of the issue, but not the actual root cause.	• Members address and resolve their health-related issues more quickly, thereby feeling better and experiencing fewer home/work/lifestyle challenges.

In summary, our telehealth program is well-positioned to provide a range of advantages for our various audiences. The primary alternative (i.e., the status quo) does not provide much benefit, and may lead to additional challenges over time.

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Sample Marketing Plan

Message

> **Notes:** Consolidate the elements from your Market Analysis into guiding messages that will help drive your marketing materials. This step brings you closer to "copy"—actual words you will use in your various marketing vehicles. Consider how you would like to attract your target audience, and how you can distinguish your offerings from other alternatives. What justifiable claims can you make? Because you are providing a health care solution, make sure all claims are defendable. Remember: You cannot *guarantee* patient outcomes, but you can say that your solution has *demonstrated* certain outcomes.

To earn target audience interest, our opening message will ask questions related to specific audience challenges. Sample copy points are shown below.

Patients

- Do you have a persistent or chronic health care problem?
- Are you delaying care because you cannot ...
    1. afford time off work for that three-hour commute to visit the specialist?
    2. even get an appointment to *see* the specialist until June of next year?
    3. bear the thought of leaving friends/family behind, or creating another burden if you need prolonged treatment?

Employers

- Does it seem like your employees are not as healthy as they could be?
- Are these health issues impacting employee productivity, and/or increasing the use of sick leave?
- Are you looking for ways to help employees improve their health—so they can stay happier and more productive, with less time off?

Churches & Charities

- Have certain members spoken with you about stressful health issues that are impacting their personal or professional lives?
- Have they delayed treatment because help is unavailable locally—and they don't have the time or work flexibility to travel for specialized care?

Referring Providers

- Do any of your patients need care that is only available outside our local community?
- Is their treatment being delayed because they do not have the time, resources, or funds to receive that care?
- Are you concerned about losing these patients to other providers/facilities if you refer them elsewhere?

Administration

- Is there a need to attract health care resources that can serve your community more effectively?
- Does it feel like your hospital's budget cannot accommodate the cost of providing highly specialized care?
- Do you want to stop losing patients to facilities with more sophisticated care capabilities?

As a follow-up to these opening inquiries, we will explain how our telehealth solution can help. Part of this process will involve highlighting unique and specific telehealth benefits.

XYZ Regional Medical Center
Sample Marketing Plan

Sample Headlines

Even the strongest message points will not make an impact without an appealing headline that invites each target audience to read further. Below, we have included a list of headline concepts that can be used in emails, news releases, brochures, and other outreach materials:

- Your wait time to see a neurologist just decreased from eight months to three days.
- XYZ RMC's new telehealth program reduces medical specialist wait times by up to 99%.
- "I never dreamed of such a great outcome!" (actual telehealth patient sample quote)
- Acme Inc. reduced employee sick leave by 25% through leading edge healthcare.
- Five UC-Davis pediatric specialists provided outstanding patient care to XYZ RMC—over the internet!

Resources

Notes: This section identifies the resources available to support various marketing activities. These resources may consist of a team, a given space, materials, or allocated dollars. Generally, a "resource" is anything that could affect your ability to execute on time or within budget if modified.

Team

We plan to leverage existing hospital staff members as follows:

- **IT**: website development and coding
- **Marketing**: copywriting (website, brochures, news releases, etc.), brochure layout, organizing a Connected Health Media Day, media relations.

Financial

Our marketing budget for the year will be $1,550. This excludes the Connected Health Media Day, which will be funded separately by the administration team once details are finalized.

Media

Notes: In this section, outline which message vehicle(s) you will use to reach your target audience. It's also helpful to explain why you have chosen specific activities over others.

We have several effective options for spreading the word about our new telehealth program. These are outlined on the following page.

XYZ Regional Medical Center
Sample Marketing Plan

Media (continued)

We have evaluated our various media options according to the following criteria:
- Skills and resources necessary to execute
- Required time and effort to execute
- Potential near-term and long-term impact
- Cost

According to our analysis, the following list represents the most effective mix:
- Website
- eNewsletter
- Brochures
- News releases
- Articles and op-eds
- Satisfaction surveys (from patients, clinicians, and administrators)
- Connected Health Media Day
- Social media
- Face-to-face visits

These combined efforts will help us communicate our telehealth solution benefits consistently and repeatedly. Our objective is to earn clear top-of-mind awareness, so that audience members will readily recall the program and its advantages with every emerging conversation or usage opportunity. This increases the likelihood that they will choose (or at least strongly consider) our telehealth option.

Marketing Activities

Notes: This section briefly outlines your key marketing initiatives. To help provide a summarized overview, it is often useful to include a table as well. If you opt to incorporate a comparative table, consider using the following category headings:
- Activity Description
- Objective(s) Served
- Target Audience(s)
- Frequency
- Metrics for Success
- Resources Involved
- Budget
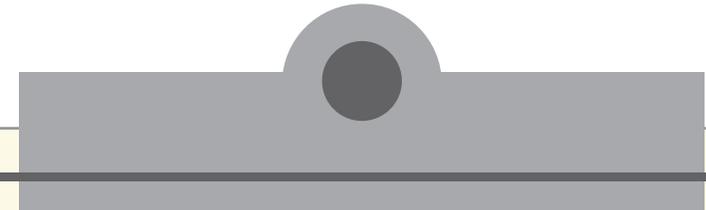
XYZ Regional Medical Center
Sample Marketing Plan

Marketing Activities (continued)

Our marketing activities will include the following:
- New dedicated telehealth website
- eNewsletter
- Several types of brochures
- Periodic news releases
- Patient and clinician satisfaction surveys
- Guest article(s) in a local publication
- Social media posts
- Face-to-face visits
- Industry conference and community event attendance
- Connected Health Media Day event

The next section, titled "Marketing Activity Details," explains some of these initiatives more fully. On the following page, a table is also included to provide a comparative overview. This table is organized into the following categories:
- Activity Name
- Brief Description
- Objectives Served (i.e., visibility, utilization, reputation)
- Target Audience(s)
- Frequency of Activity
- Metrics for Success
- Human Resources Needed
- Budget (estimates of both startup and operating costs)

Marketing Activity Details

Notes: The table below provides a detailed overview of elements associated with these different marketing activities. It is helpful to include such a table when you want to provide a summarized recap for team members reviewing your marketing plan.

Activity	Description	Objective(s) Served			Target Audience(s)	Frequency	Metrics for Success	Resources Involved	Budget	
		Visibility	Utilization	Reputation					Startup Costs	Ongoing Costs
Website	Include overview of telehealth program, team, providers, technology, and benefits. Also include contact info and sign-up form to receive eNewsletter.	X			Patients, Hospital Administration, Referring Providers, Supporting Organizations	Ongoing updates as needed	- # of visitors - # signing up for newsletter	Telehealth Director, IT	$200-$1,000 extended RMC website to include Telehealth Section	$0 (use existing website)
eNewsletter	Use Constant Contact to send out information on telehealth benefits, technology, consulting physician profiles, and real-life success stories.	X	X	X	Patients, Hospital Administration, Referring Providers, Supporting Organizations	Monthly	- # of subscribers - Open rate	Telehealth Director, IT	$0	$10-$30/month
Brochure - General	Printed brochure or flyer explaining telehealth, and its benefits to patients.		X	X	Patients, Supporting Organizations	One time	- # of people contacting us for more info	Telehealth Director, Marketing	$20-$1,000 depending on # of reprints and quality of material/design	$0
Brochure - Referring Providers	Printed brochure or flyer explaining telehealth, and its benefits to providers and the patients they serve.		X	X	Referring Providers	One time	- # of people contacting us for more info	Telehealth Director, Marketing	$20-$500 depending on # of reprints and quality of material/ design	$0
News Release	Stories highlighting local healthcare issues and the telehealth solution. Use patient stories to convey the message. These news releases will also be posted on the website.	X		X	Patients, Hospital Administration, Referring Providers, Supporting Organizations	two to three per year	- # of people contacting us for more info	Telehealth Director, Marketing	$20-$750/release depending on length and outlet used	$0
Satisfaction Survey - Patient	-How would you rate your telehealth experience (1-10)? -Would you recommend to a family member or friend (1-10)? -What can we do to improve our telehealth program?		X	X	Patients, Hospital Administration, Referring Providers, Supporting Organizations	Per encounter	- Satisfaction score	Telehealth Director	$0	$0
Satisfaction Survey - Clinician	-How would you rate your telehealth experience (1-10)? -Would you recommend to a colleague (1-10)? -What can we do to improve our telehealth program?		X	X	Hospital Administration, Referring Providers	Every six months	- Satisfaction score - % that would use our program again	Telehealth Director	$0	$0
Satisfaction Survey - Administration	-How would you rate the success of this telehealth program (1-10)? -What benefits do you perceive? Please describe.		X	X	Hospital Administration	Annual	- Satisfaction score - % that can identify telehealth benefits	Telehealth Director, Administration, Marketing	$0	$0
Connected Health Media Day	Event designed to showcase and demonstrate the telehealth solution. Will include administrators, along with specialists from UC-Davis via videoconference. These guests will discuss what they do during a typical telehealth consult.	X	X	X	Patients, Hospital Administration, Referring Providers	Annual	- # of attendees - # signing up for newsletter	Telehealth Director, Marketing, Administration	TBD	$0
Guest Article in Local Publication	Stories highlighting local healthcare issues and our telehealth solution. Patient stories will underscore this message. Guest articles also posted on the website.		X	X	Patients, Hospital Administration, Referring Providers, Supporting Organizations	Two to three per year	- # signing up for newsletter	Telehealth Director, Marketing	$0	$0
Social Media Posting	Videos on YouTube profiling consulting physicians, participating clinicians, patients assisted, and technology in use. Links also embedded on the website.	X		X	Patients, Supporting Organizations, Referring Providers	At least one per quarter	- # signing up for newsletter - # of views	Telehealth Director, Marketing	$0 (possible video production costs)	$0
Face-to-Face Visits	In-person visits with referring providers, supporting organizations, and administrators to discuss issues our telehealth solution will address. Can also speak to specific questions and concerns.	X	X	X	Hospital Administration, Referring Providers, Supporting Organizations	As many as possible	- # of people contacting us for more info	Telehealth Director	$0	Minimal local travel expenses
Conference Attendance	The regional Rural Health Association's July annual conference is a good place to network and learn about promising practices. We will also attend CTRC's Annual Telehealth Summit.	X	X		Supporting Organizations	Annual		Telehealth Director	$750/conference	$0

XYZ Regional Medical Center
Sample Marketing Plan

Marketing Activity Details (continued)

Notes: Some activities require a more detailed explanation. This section is designed to provide that information, in conjunction with the comparative table mentioned above. If you are planning to launch a website, for instance, this section can include information about pages, content, forms, features, and navigation. The table mentioned above can appear before your detailed breakouts, or after. In either case, it simply functions as a summarized high-level overview or recap.

Website

The website is designed to be a useful tool for all our target audiences—such as patients, providers, internal administration, staff, and supporting organizations. It will function as a one-stop resource for the following information:

- Available clinical services
- Telehealth provider profiles
- Testimonial-style stories about telehealth changing lives
- Telehealth technology (as illustrated by site-embedded videos)
- Telehealth benefits (broken out by different constituents)
- Resources about getting started with telehealth
- Articles discussing how telehealth provides both clinical and economic benefits
- Links to telehealth informational resources (i.e, CTRC, CTN, American Telemedicine Association)
- An overview of our telehealth team
- Contact information

The site will also include a form that lets visitors sign up for our telehealth eNewsletter.

The website is intended to help:

- **Patients** feel more comfortable using our telehealth services
- **Referring providers** feel more comfortable suggesting that their patients take advantage of these services
- **Supporting organizations** feel more comfortable recommending these services
- **Administrators** better understand our telehealth program, so they will continue supporting it via increased funding and general advocacy
- **Internal staff** better understand the program, so they will continue supporting it through ongoing participation and general advocacy
- **Website visitors** easily sign up for our eNewsletter

While this initiative involves considerable content development, keep in mind that it serves multiple purposes. For example, portions of this content can also be re-used in other media—including brochures, flyers, presentations, videos, and more.
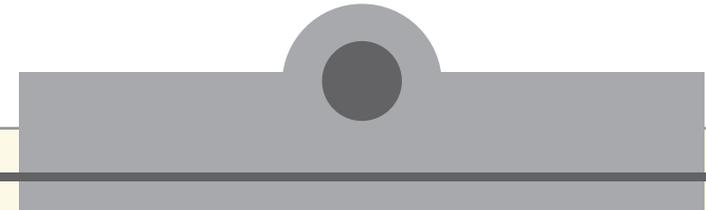
XYZ Regional Medical Center
Sample Marketing Plan

Marketing Activity Details (continued)

Newsletter

The eNewsletter will provide a recurring supply of content that reminds recipients what is accessible on our website, and highlights new information as details become available. It essentially serves as a continuous reminder to visit our website for the latest information and content updates (i.e., newly added telehealth clinical disciplines, patient success stories, etc.).

This ongoing communication with our subscribers keeps our telehealth program at the forefront of their awareness. When these individuals encounter a health care situation that may lend itself to telehealth, we want them to remember our program immediately.

Brochure

As a leave-behind resource, our brochure will serve to remind supporting organizations about our telehealth program. Budget limitations dictate that this piece take the form of a one-page, four-color flyer printed front-and-back. It will highlight essential program information—including clinical specialties covered, advantages, success stories, selected testimonials, and instructions for obtaining program access.

### News Releases/Guest Articles in Local Publications

Our news releases and guest articles will help reinforce broad awareness of our telehealth program. Simultaneously, they will help us forge strong relationships with key media organizations. Ultimately, we would like our print-based outreach to help us achieve exposure on local television and radio stations.

Connected Health Media Day

This three-hour "open house" event will introduce our telehealth program to the local community. To help build interest, we will distribute several news releases and other media announcements in advance. Our goal is to have two or more consulting physicians available via the telehealth videoconferencing system to discuss their typical consultative approach, and to share success stories. We will encourage the public to stop by, virtually meet some of our physicians, and view demonstrations of the new technology.

Attendees will also have the chance to sign up for our eNewsletter, and to obtain a brochure. Additional goals include the following:
- Persuade business sponsors to provide food and beverage (always an audience draw)
- Arrange to have various city, county, and regional legislators in attendance
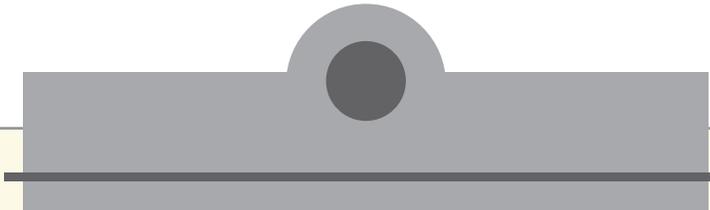
XYZ Regional Medical Center
Sample Marketing Plan

Marketing Activity Details (continued)

Satisfaction Survey

Satisfaction surveys will be our primary method of obtaining direct, systematic feedback on the success of our telehealth program. The process needs to be holistic and inclusive—which means we will solicit feedback from patients, participating clinicians, and administrators.

These survey results will be used for our external marketing efforts, in the form of website posts and news releases. They will also be used for our internal marketing efforts, including administrative and staff presentations.

Social Media

In terms of social media, our initial platform target will be YouTube. This popular site allows us to create our own free channel and post multiple videos. We can then embed these YouTube videos into our website—thereby obtaining even more leverage from our efforts. Ideas for video topics include:
• Patient success stories
• Telehealth technology demos
• Testimonials from staff members who have personally used the technology
• Interviews with physicians who provide telehealth consults

Face-to-Face Visits

Face-to-face visits are critical for educating the public and creating a general telehealth comfort level. This is especially key for supporting organizations like local churches, community mental health centers, emergency medical services (EMS), regional employers, and the local HIV/AIDS support center (for infectious disease consults).

We will sit down with representatives from these organizations to discuss health-related challenges in their various environments. This will help us identify ways that our telehealth program could provide potential assistance. We will also leave behind a supply of informational brochures.

XYZ Regional Medical Center
Sample Marketing Plan

Success Metrics

Notes: Marketing activities should produce measurable outcomes. In this section, describe how each activity will be assessed in terms of results. While the Marketing Activities Summary identifies success metrics for each individual activity, this section aggregates all success metrics across these activities (as certain metrics will be served by multiple activities). Do your best to quantify these metrics, identifying the various activities contributing to each one. Reviewing these elements over time can help you learn, adjust, and continually enhance your approach.

Below are success metrics and targets for our XYZ RMC telehealth program:

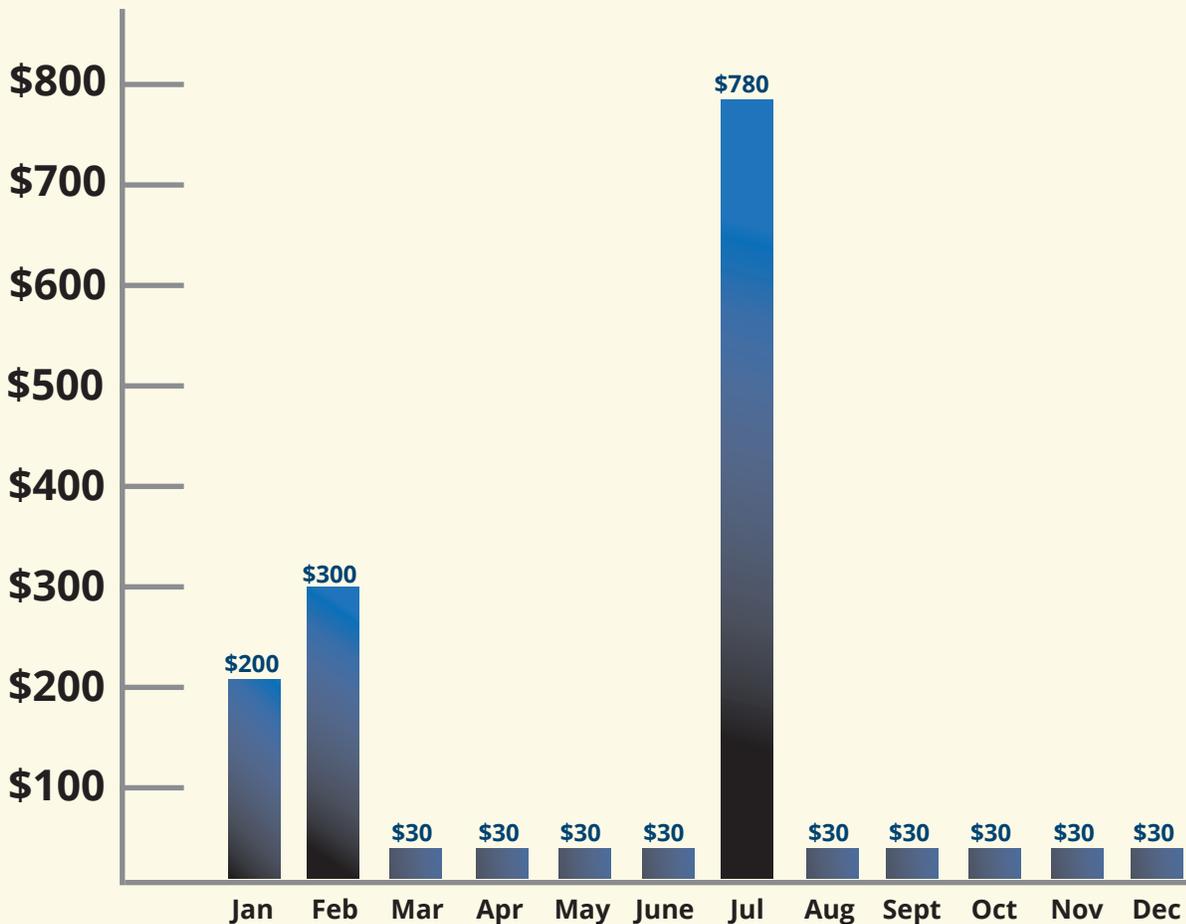| Metric	Target (First Year)	Achieved/Identified Via...
Website visitors	1,000	Calls-to-action that drive people to website (measured by Google Analytics installed on website)
Newsletter sign-ups	250	Website, newsletter shares, brochures, social media
Newsletter open rate	25%	Newsletter content
People requesting more information	50	Website, brochures, news releases, face-to-face visits
Satisfaction score: patients	90%	Survey
Satisfaction score: clinicians	80%	Survey
Clinicians who would use telehealth again	90%	Survey
Satisfaction score: administration	80%	Survey
Administrators who can identify at least three telehealth benefits	75%	Survey
Social media views	300	YouTube metrics

XYZ Regional Medical Center
Sample Marketing Plan

Financials

Notes: This section summarizes the total financial outlay for your marketing plan. If possible, break out your figures in several different ways—by month, activity, and/or capital costs versus operating costs. This provides a more granular view, which can be helpful if changes occur or adjustments are needed along the way.

Our total budget for this plan is $1,550. The graph below illustrates projected monthly marketing expenses for the program:

Month	Amount
Jan	$200
Feb	$300
Mar	$30
Apr	$30
May	$30
June	$30
Jul	$780
Aug	$30
Sept	$30
Oct	$30
Nov	$30
Dec	$30

Monthly Marketing Program Expenses

MARKETING TELEHEALTH DIRECTLY TO PATIENTS

Telehealth has been making health care more accessible and improving patient outcomes for decades. With the rise of "direct to patient" telehealth services in recent years, many patients are now familiar with the basic concept of telehealth—even if they use different labels to describe it. Commonly used alternate terms include "telemedicine," "eVisit," "virtual visit," and "video visit."

Successful telehealth services and programs are not always easy to create; however, they often carry a sustained value that far outweighs any challenges you may encounter. Of course, providing a new service is only part of the battle. You also need to get the word out, so patients will want to take full advantage of it!

The good news is, marketing telehealth to your patients involves many of the same key principles already discussed in this guide. It all starts with a clear strategy. Once you understand where you want to go, and who your target audience is, you can map out the most efficient plan.

The following pages share some practical tactics and proven tips for promoting telehealth to your patients and the community.

PATIENT OUTREACH STRATEGY
STEP-BY-STEP

When creating a marketing strategy to help patients learn about your telehealth program, the first step is determining what you want to achieve. The main objective, of course, is driving awareness that inspires a specific action—i.e., scheduling a telehealth visit with one of your practitioners. Start from there, and expand your approach using these key insights.

1 DEFINE YOUR GOALS

Start SMART

"S.M.A.R.T." is an acronym that stands for **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-Based. Ensure that you articulate at least one S.M.A.R.T. goal, while trying to avoid any unfocused goals. Below is a brief example:

> **Unfocused Goal:**
> We really want to spread the word about our telehealth program.
>
> **S.M.A.R.T. Goal:**
> By the third quarter, we would like to be seeing at least eight telehealth patients per day who need to address some sort of dermatology issue.

Notice the difference? The first goal is vague, while the second goal:

- **Specifies** the type of appointment and patient (i.e., an individual who needs specialized dermatology care).

- Indicates a **measurable** number of desired patients per day.

- Mentions a figure that is **achievable** for this practice.

- States an intention that is **relevant** to creating care-based revenue.

- Is **time-based** (i.e., "by the third quarter").

Specifying these core elements lets you track metrics, determine if you are on course, and make adjustments as you go.

PATIENT OUTREACH, continued

② GATHER AUDIENCE INSIGHTS

Define Who You Are Targeting

Once you have your goal(s) in place, start thinking about your audience. Providing basic information to your surrounding community is important. However, if you want to increase actual revenue, target people who can directly benefit from your telehealth services. If you focus on telebehavioral health, for example, think about how to reach people experiencing job-related, family-related, or illness-related stresses.

As part of this exercise, you may want to gather a bit of sample patient data. Here are just a few questions you might consider:

- How many of your patients travel more than 10 miles to see your clinicians in person?
- What percentage of your current patients need the specialized care you plan to provide via telehealth?
- How would you describe your typical patients?
  (i.e., new parents, athletes, college students, elderly residents, etc.)
- Is there any pattern to the rate at which your target patients tend to re-schedule or cancel their in-office appointments?
  (i.e., what is your no-show and cancellation rate, and is an obvious pattern emerging?)

From these data patterns, you can often create some **personas**— fictitious representations that capture specific traits, demographics, or life circumstances. For example, say your typical patient is a 30-40 year old single mom living in an economically challenged county. Assume she typically seeks pediatric care, along with periodic wellness checkups for herself. Create "Patient Pam" to embody all these traits. What does Pam's day usually look like? What are her recurring challenges—commute, budgeting, sleep hygiene, work/life balance, nutrition, stress management, childcare, or something different? Think about ways to make your telehealth marketing message especially relevant to Pam.

PATIENT OUTREACH, continued

② GATHER AUDIENCE INSIGHTS

Consider Ways to Share Your Message

Once you have identified your prospective audience, think about ways you might reach your "ideal" patient population. Let's consider our previous telebehavioral health example. You could arrange meetings with leaders at local churches, community centers, and/or social service organizations. Explain your services, then ask if there is:

- an opportunity to share a brochure/insert in one of their future bulletins.
- a chance to create a guest blog on their website, mentioning your telehealth services. From a telebehavioral standpoint, you could focus on "strategies for dealing with stress" or "the stages of grief."
- a willingness to mention your services on their social media page(s)— like sharing a link to telehealth program information on your own website.
- an opportunity to share your contact information with their pastors, coaches, mentors, volunteers, lay ministry teams, etc.

If your goal involves converting existing in-office patients to telehealth, you might print up some waiting room table tents or posters. You could also create staff lanyards, badges, or face masks proclaiming, "Ask me about telehealth!" You might even hand out pens to every patient, featuring a specific URL leading to telehealth information on your website.

③ ENHANCE VISIBILITY

Cover All the Bases

To keep your entire community informed, share news about your telehealth services across multiple platforms. Think about all the touchpoints your target audience normally encounters, then update those areas frequently. Visit our dedicated "Patients" page at **caltrc.org** for examples of different types of telehealth visits, common telehealth questions, patient handouts, and more. This content can give you some great ideas for topic-relevant insights to share with prospective patients, and the community at large.

PATIENT OUTREACH, continued

③ ENHANCE VISIBILITY

➤ **Keep Brainstorming**
Make sure that you leverage multiple messaging opportunities across a diverse range of vehicles. The chart below provides a few suggestions to get you started. Meet with your internal teams, and brainstorm even more approaches that are relevant to your particular organization or audience.

CONNECT

Promote the program on your **social media platforms**. Post questions and invite engagement. Create periodic hashtags for special events, and ask followers to share them.	If you participate in community video calls, create a special **Zoom background** that highlights your telehealth program.	Design **web badges** or **social media frames** that your telehealth advocates can display online.

INFORM

Create a landing page **checklist, video, or widget** that helps patients choose between your various care options.	Include an interactive telehealth **banner or colorful button** on your website homepage. Link to a special landing page or signup form that provides additional details.	Consider designing a dedicated telehealth **logo, seal, and/or tagline** to use in your messaging and community outreach.

EDUCATE

Update your news release **boilerplate** and **PowerPoint slide decks** to highlight your telehealth program.	Think about hosting a **Q&A event**, where you can promote telehealth to a specific target audience. Consider offering refreshments and raffle prizes from community sponsors.	Forge **community partnerships** with local churches, employers, social service organizations, and community centers to obtain regional health care insights and create connections.

INSPIRE

Consider branded hand-outs such as **notepads or refrigerator magnets** that keep your telehealth program top-of-mind for patients at home.	Offer **pediatric** telehealth? Get junior patients involved by handing out telehealth-themed stickers. Print in-office telehealth coloring sheets to keep kids occupied. Have a contest, and display the best entries.	Remind patients that telehealth often represents a great alternative to walk-in convenient care. Create **phone answering scripts** for your staff, or a telehealth-focused **hold message**.

PATIENT OUTREACH, continued

④ ADVOCATE INTERNALLY

➤ **Your Own Team Members Are Your Best Advertisers**
Telling patients and consumers about your telehealth program is key—so make sure your staff members and providers know about it as well. They can help spread awareness through their personal e-mail signatures, social media pages, and relationships. Enlist clinicians and other office staff to act as advocates with the patients they see.

Remember how vital it is to reassure staff members on your team who may be concerned about their long-term contributions once telehealth is introduced. Explain that in many cases, telehealth can expand future treatment opportunities and the need for their skills.

⑤ LEVERAGE FEEDBACK

➤ **Good Reviews Are Golden**
Patients frequently check ratings and reviews when choosing a health care provider. Whenever you earn solid kudos, use them to promote your telehealth program.

Consider requesting feedback from the telehealth patients you serve, and posting positive comments after receiving permission. Try sending a quick text or email survey following each visit. Take the time to evaluate any new insights shared, to improve your program over time. Then, keep sharing the best comments on your website and social media pages. Make time to touch base with your reviewers, too. Ask follow-up questions or request clarification. Once patients realize how much you value their perspectives, they may become valuable program advocates.

PATIENT OUTREACH, continued

6   DIVERSIFY YOUR MESSAGE

Share Useful Insights on a Schedule
Consider starting a weekly or monthly printed bulletin, eNewsletter, or blog that provides useful telehealth insights at regular intervals. It's not as hard as you might think. Stuck for ideas? Try a few of the following:

- Answer frequently asked patient questions.
- Conduct a patient poll on telehealth, and share results/comments.
- Help patients understand which cold or flu symptoms might warrant a doctor visit, and then promote telehealth as a safe and convenient care option.
- Interview one of your telehealth providers.
- Share an inspiring telehealth success story.
- Provide helpful tips for more productive telehealth visits.
- Share a short video snippet discussing key telehealth advantages.
- Define different types of telehealth visits, and important terms to understand.

If you get stuck for ideas, visit **caltrc.org**. Our dedicated "Patients" page features unbiased tips and insights that pertain to all of these areas, and more.

OTHER INSIGHTS TO SHARE WITH PATIENTS

➤ **Types of Telehealth**
When educating your patients about telehealth, make sure they understand that several different types of telehealth currently exist. At present, there are four distinct categories:

1 **Live Videoconferencing (Synchronous)**
A real-time audio and visual interaction between a patient and a provider.

2 **Store and Forward (Asynchronous)**
The process of sending pre-recorded patient information electronically, typically to a specialist. Store and forward visits function similarly to sending a secure email. For example, a patient or provider might send a picture to a specialist for review at a later time.

3 **Remote Patient Monitoring (RPM)**
Collects personal health and medical data from an individual in one location, which is then transmitted to a provider in a different location for use in care and related support. RPM typically uses smart devices to get vital signs that help monitor a patient's condition.

4 **Mobile Health (mHealth)**
Health care and public health education via various mobile communication devices—such as cell phones, tablet computers, or PDAs.

➤ **More Tips and Insights for Patients**
Get even more patient-related tips and insights at **caltrc.org**. Download our patient-facing infographic, **"How Do I Use Telehealth?"** Also view Pacific Basin Telehealth Resource Center's patient-facing educational video, **"What to Expect from a Telehealth Visit."** These resources are available free of charge, and can be shared directly with patients. See additional options on our "Patients" page.

NEED ADDITIONAL SUPPORT?

The California Telehealth Resource Center (CTRC) is your unbiased resource for telehealth success. Since 2006, we have been earning our trusted reputation as a leading source for telehealth program implementation and sustainability guidance. We serve providers, patients, health systems, clinics, government agencies, and safety net populations—sharing unbiased educational and support information, often at no cost to you.

Visit **caltrc.org** for insights, training tools, services, and materials that help you take full advantage of everything telehealth has to offer. Here are just a few examples:

➤ Expert consultative services, both before and during telehealth program development

➤ Time-saving resources for patients and families

➤ Training videos for all members of your provider program team—including administrators, telehealth coordinators, and clinical presenters

➤ Telehealth development guides that incorporate the latest promising practices and more, in easy-to-follow formats

➤ Our popular Telehealth Program Developer Toolkit—a foolproof, step-by-step guide that helps organizations of all sizes implement, develop, and sustain a telehealth program

➤ Hands-on resources for organizing and managing telehealth programs—including practice guides, policy and research reports, presentations, sample forms, and workflows

➤ Links to continuing education and accredited certification courses, in partnership with leading telehealth schools

➤ An ever-expanding list of California-based telehealth specialty providers

➤ Access to telehealth-related events, workshops, and conferences

CONTACT US!
www.caltrc.org ● www.facebook.com/CaliforniaTRC
877-590-8144 ● www.twitter.com/CaliforniaTRC