

Building A Destination Healthcare Brand

The Northwell Story

Ramon Soto

Senior Vice President and Chief Marketing and Communications Officer, Northwell Health

August 14, 2019



NRC Health Symposium | A journey to understanding | #NRCSymp 1

Who is Northwell Health?



NRC Health Symposium | A journey to understanding | #NRCSymp 2



23
hospitals
700+
ambulatory
facilities



\$12
billion
annual
operating
budget



5.5 million
patient encounters



30%
inpatient share
of market



68,000
employees

nearly 4,000
employed physicians

13,600+
affiliated physicians

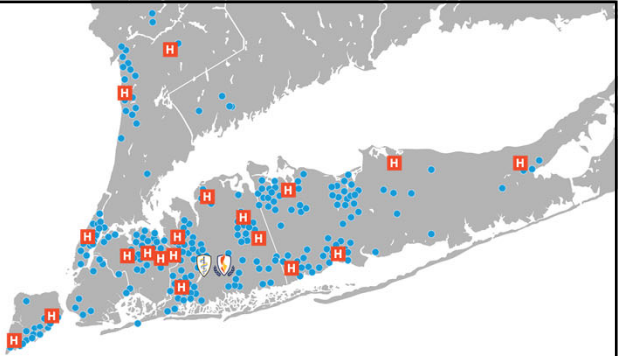


1700
residents
and fellows in
142 programs



4,000
researchers

2,500
clinical
research
studies conducted



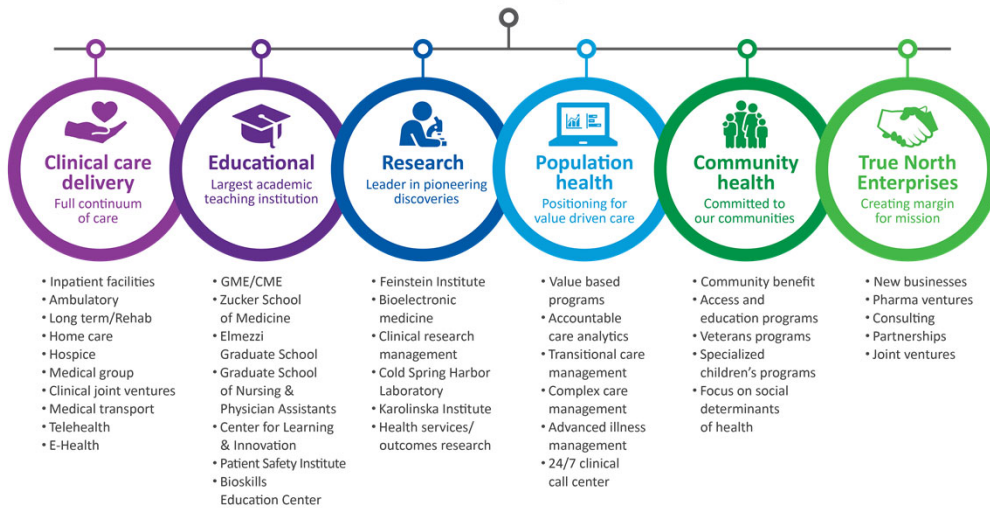
Strategic partners

- Boca Raton Regional Hospital, FL
- CASAColumbia, NY
- Cold Spring Harbor Laboratory, NY
- Crouse Health, NY
- Epworth HealthCare, Richmond, Australia
- Karolinska Institute, Sweden
- Maimonides, NY
- Nassau University Medical Center, NY
- Rothman Orthopaedic Institute, PA
- Western Connecticut Health Network, CT



Northwell Health Integrated Delivery System

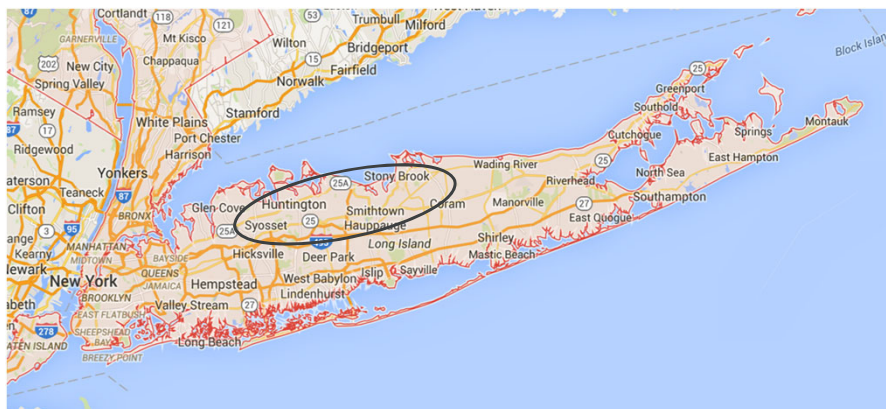
Shared clinical and management services



Why Rebrand?

The North Shore Long Island Jewish Health System Name...

The challenge with “North Shore” - Signals local, limited in reach and small in scale, and not expansive enough given the communities you serve



A matter of prestige and bearing...

“NorthShore” is not a known place—not a competitive advantage over “Manhattan”



Drop-Off/Inaccurate Use/Mispronunciation...

- North Shore
- LIJ
- “Northshore”
- /nôrTH SHôr liĵ/

Consumer Confusion and the Need to... Simplify and Amplify



NRC Health Symposium | A journey to understanding | #NRCSymp

9

The power of an untold story... 2015

- 21 Hospitals – Westchester, Staten Island, Manhattan, Brooklyn, Queens, Long Island
- 550 Ambulatory Facilities – 4 Million Patient Visits
- World Class Research – 2,700 Researchers
- Medical Education – First New Medical School in NY in 40 years
- Population Health – Innovative, New Engagement Solutions



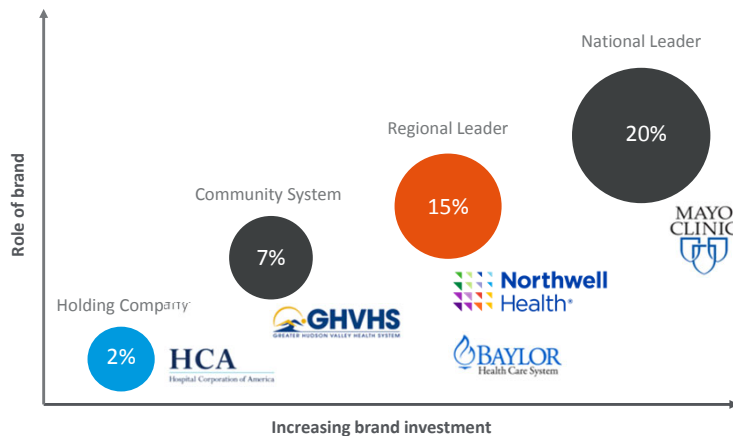
NRC Health Symposium | A journey to understanding | #NRCSymp

10

Market Forces Driving Our Strategy

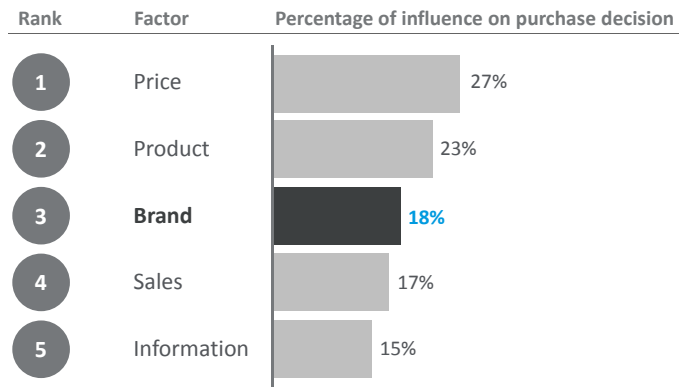
Brand as priority for good reason:

Brand is of increasing importance as systems realize their growth aspirations



Source: InterbrandHealth research

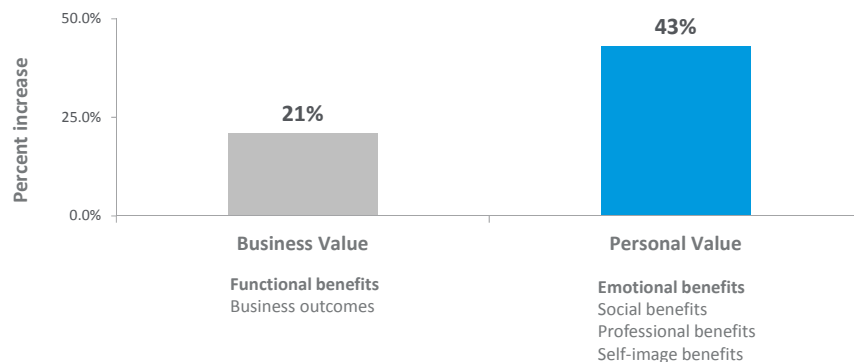
A strong corporate brand is on par with sales as an influencing factor of purchase decisions



Source: McKinsey B2B Branding Survey, 704 executives with substantial influence on supplier selection, nearly 20% are buyers of IT-related products/services, 2012

Emotional benefits have twice the impact on purchase decisions than functional benefits

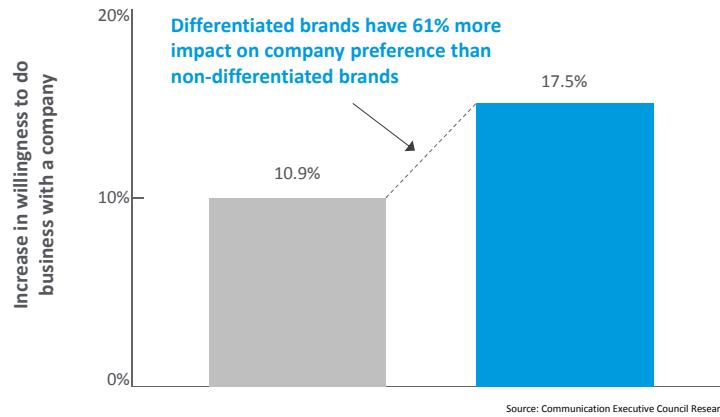
Impact of perceived brand benefits on consideration, purchase and advocacy



Source: Corporate Executive Board/Google/Motista Study with 3,000 B2B buyers across 36 brands and 7 categories, 2013

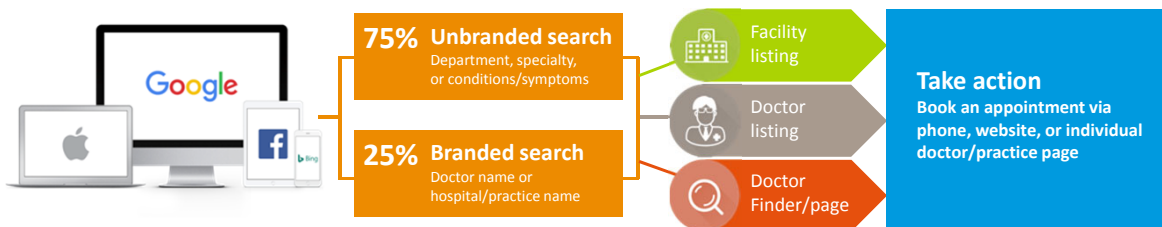
Brand differentiation significantly boosts corporate brand preference

Impact of brand strength to willingness to do business with a company



The health journey is evolving...online

Conditions / treatments / symptoms make up the majority of healthcare related searches

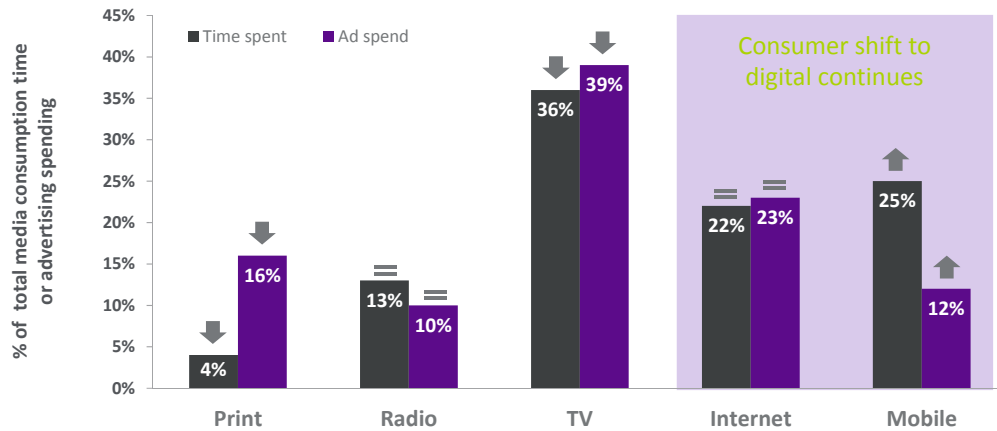


175 million health related searches **per day** using Google

75% of journeys start with researching condition or symptom **online**

We need to reach consumer where they live...

% of time spent in media vs. % of advertising spending, USA, 2017



Source: Advertising spend based on IAB data for full year 2015. Print includes newspaper and magazine. Internet includes desktop, laptop and other connected devices. Time spent share data based on eMarketer 4/16. Arrows denote Y/Y shift in percent share. Excludes out-of-home, video game and cinema advertising.



A Hyper Competitive Market



Northwell's Brand Strategy

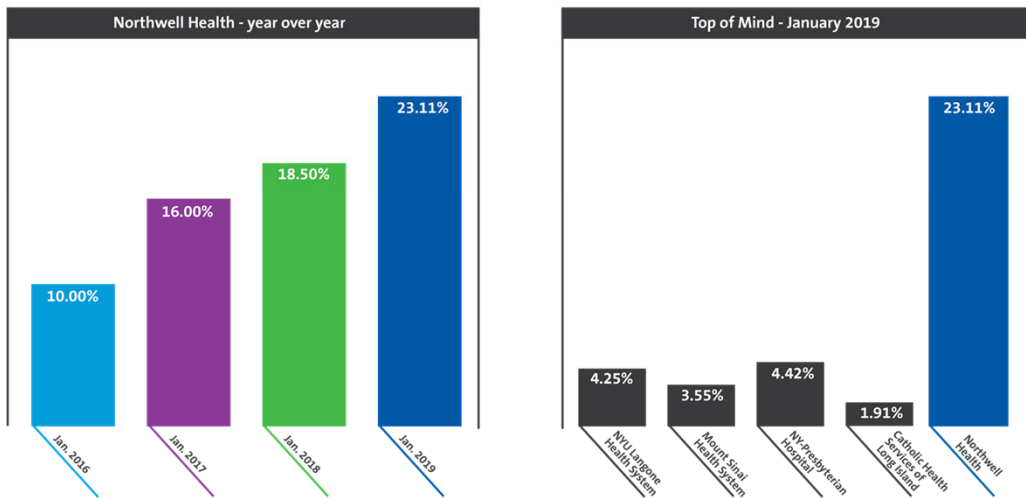
Brand Strategy

1. Create a **Destination Healthcare Brand**
2. Create a **Differentiated Brand Experience**
 - ✓ Emotionally Driven
 - ✓ Accessible to consumers
3. Use **Innovation** as the Key Messaging Pillar
 - ✓ Not just raising our standard, but the standard of healthcare
 - ✓ Innovation that cures and cares
4. Drive **Consumer Engagement** with Our Brand



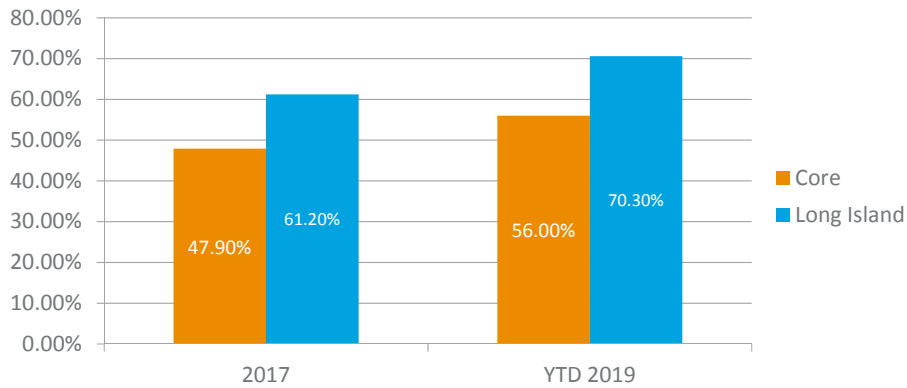
Northwell System Awareness – Un-Aided Top of Mind (Core Markets)

Question: *Thinking of systems in your area, which one comes to mind first?*



Overall Northwell Hospitals Awareness Core Market VS Long Island Only

Thinking of health/hospital systems in your area, which ones come to mind first?



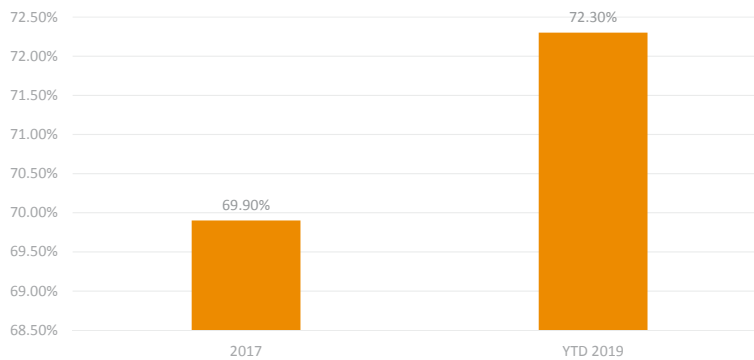
Source: NRC Data



Northwell Brand Momentum

Based on your own experience and perceptions, which of the following best describes Northwell Health facility?

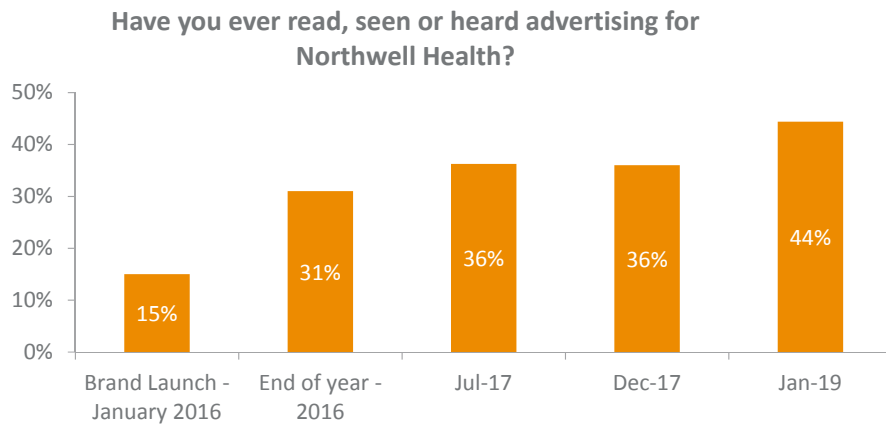
It's really on way up + It's on the way up (top 2 box)



Source: NRC Data



Northwell Ad Recall Core Market – Answered YES

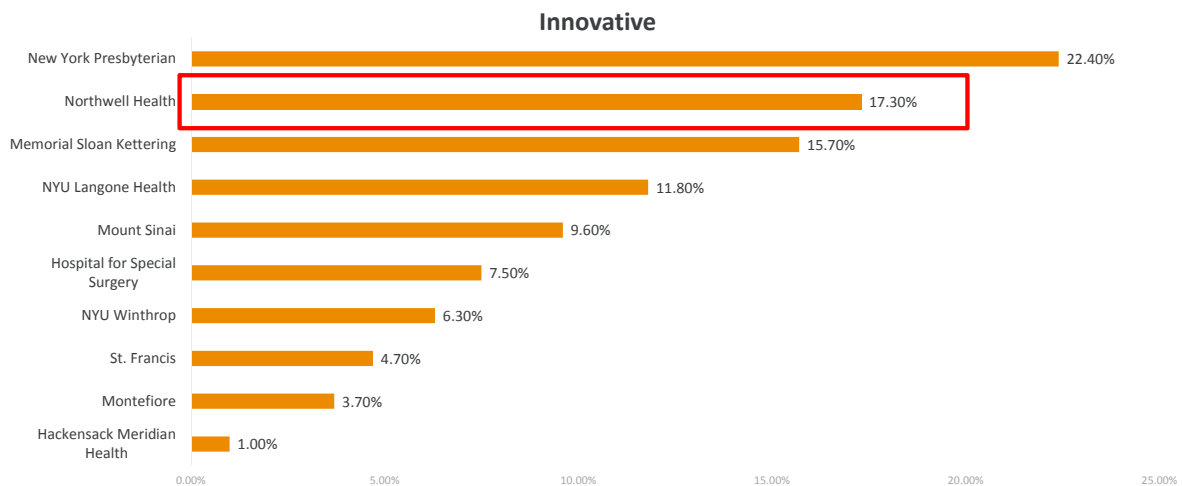


Source: NRC Data



Health System Attributes - Core Market

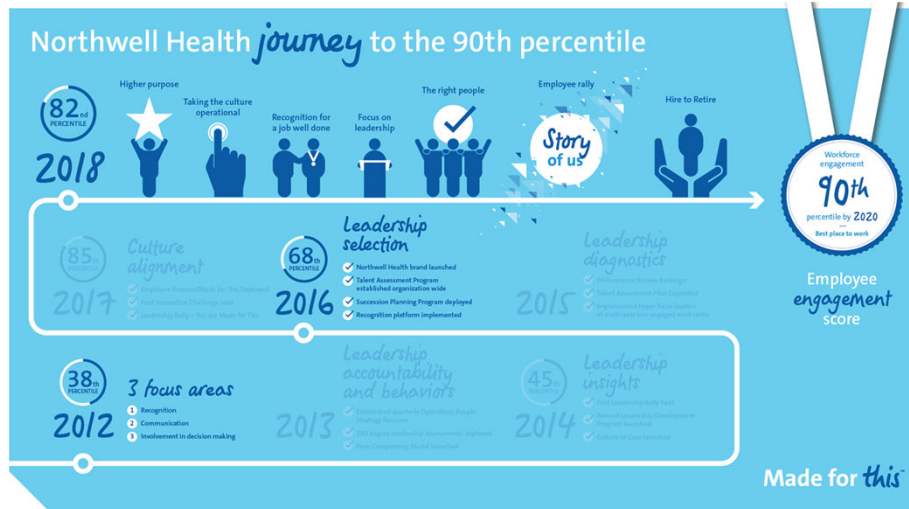
Question: Which attributes do you most associate with the following health systems?



Source: NRC Data Nov 2018 – custom question that started running mid-year 2018



Workforce engagement



A Peek Behind The Curtain

Creating 1:1 relationships with our customers

Positioning Northwell as a destination healthcare brand

Demographics

Life Stage

Preferences

Behaviors

Interests

Lifetime Value



Knowing Our Customers

Our audience includes tens of millions of customer touches

4,300,000+ Patient encounters

1,800,000 Patients treated annually

772,234 Emergency visits

664,107 Home health visits

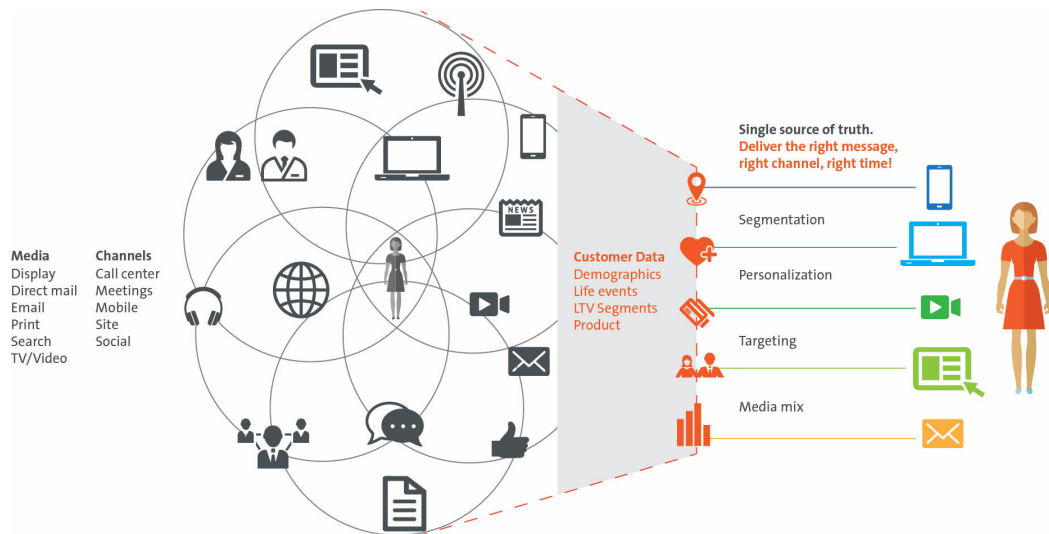
1,502,678 Web sessions (monthly)



Source: Annual report 2015; Web statistics report, Aug 2016



Building a Complete View of Our Customers

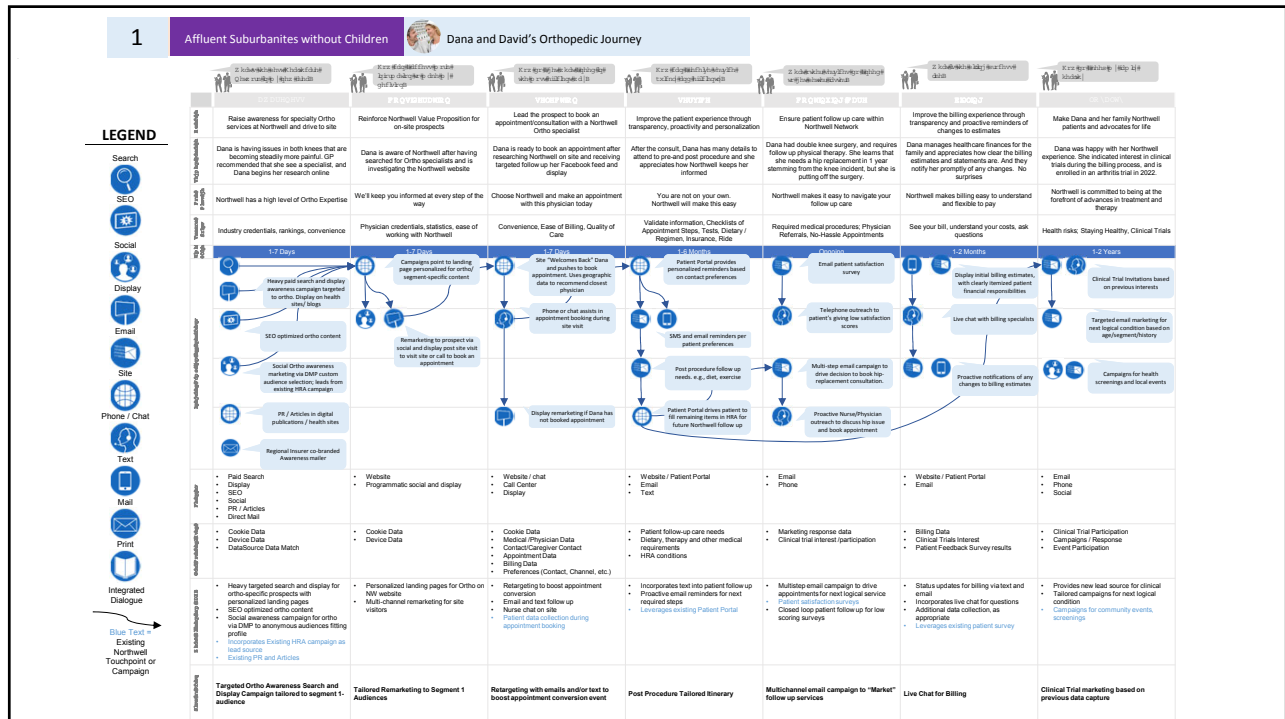


Customer Journey Mapping

Three patient journeys designed to acquire, retain and grow patients in our three value-based segments. Each journey contains campaign and treatment recommendations, that vary by channel, message and creative depending particular segment needs.

Affluent Suburbanites without Children	Affluent Suburban Moms with Children	Older/Wise with Heavier Medical Needs
"Keep me informed so I can make the right decisions"	"Give me the best and most efficient care for my family"	"Help me get the best Doctors and make me feel at home"
Age: Early 50's High HHI	Age: Late 30's	Age: Late 60's Moderate to High HHI
Married, No Children in HH	Married, 1-2 Children in HH	Married, Older Adult Children
Service Lines: Cardiology, ENT	Service Lines: Orthopedics, Neonatology, ENT, OB, Pediatrics	Service Lines: Cardiology, Endocrinology, Orthopedics
Average # of Services: Medium	Average # of Services: Medium	Average # of Services: High
Average # of Encounters: Low	Average # of Encounters: Low - Medium	Average # of Encounters: High
Percent of Patients: 9%	Percent of Patients: 31%	Percent of Patients: 19%
Orthopedics Journey Example	OBGYN Journey Example	Cardiology Journey Example

Each segment was assigned a condition as a basis for beginning the journey. As Northwell gathers more browsing history and PII from the prospect, the journey becomes more tailored.



Engaging With Consumers

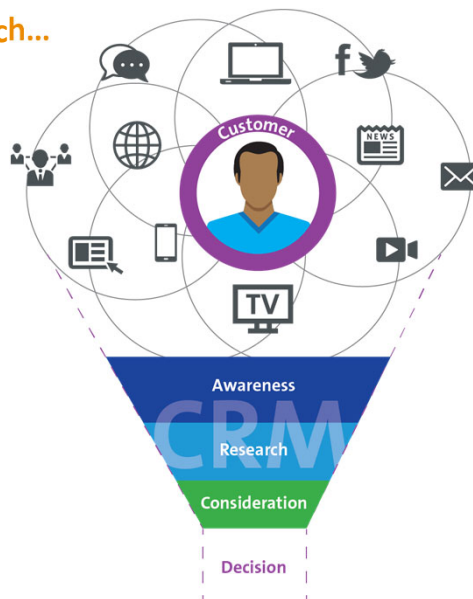
Redefining our Engagement Approach...

Culture

Interaction

Personalization

Relevance



Digital Patient Experience

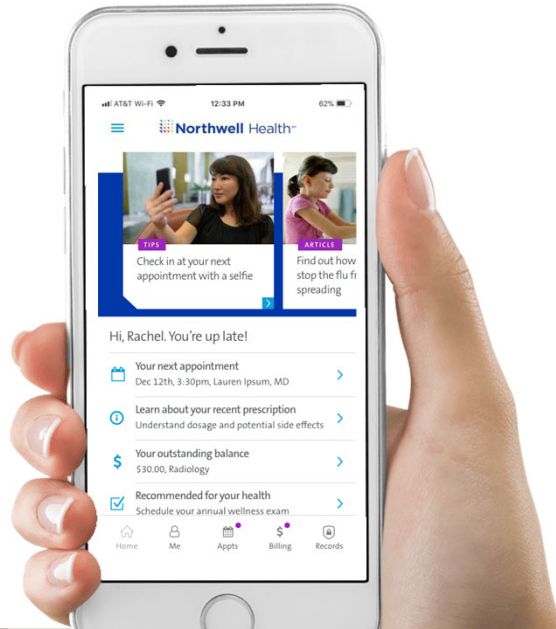
Digital life is real life.
So how do we care
for our communities
in the digital world?



An interdisciplinary
team from across
the enterprise



Interconnecting our
backend systems to provide
a digitally-powered,
patient-centric experience



NRC Health Symposium | A journey to understanding | #NRCsymp

37

Northwell.edu... From *all things to all people* to Relevance and Personalization

Today, we are trying to be everything to everyone, instead of focusing on driving toward business goals and delivering on customer needs.

- Best-in-class online experience
- Inspiration drawn from leading consumer-focused industries
- UX that delights those seeking healthcare services
- Conversion engine that eliminates barriers to shopping/purchase

Request an appointment | Pay a bill | Make a gift | Q

Northwell Health

Doctors & care | Billing & insurance | Education & resources | Research & Innovation | About us | For professionals

Children see us differently

Kids we treat see us as much more than their doctors, nurses and care team. They see rock stars, magicians, friends—and we see them differently too. Because we believe the more you understand a child, the better you can treat them.

Play video

Caring for you

Connecting you to the care you need

We care for patients and a community of eight million people—which means that we make extra effort to help you find and access what you need, when you need it.

Popular links

Request an appointment

Access your medical records

Pay your bill online

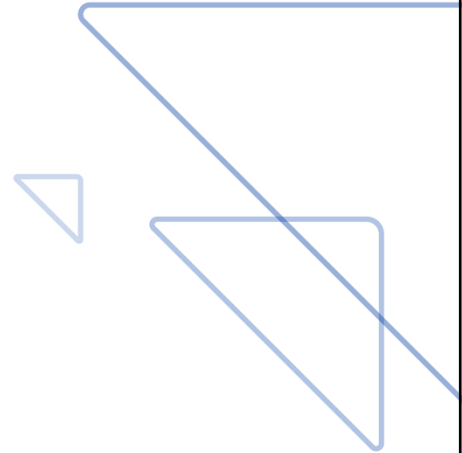


NRC Health Symposium | A journey to understanding | #NRCsymp

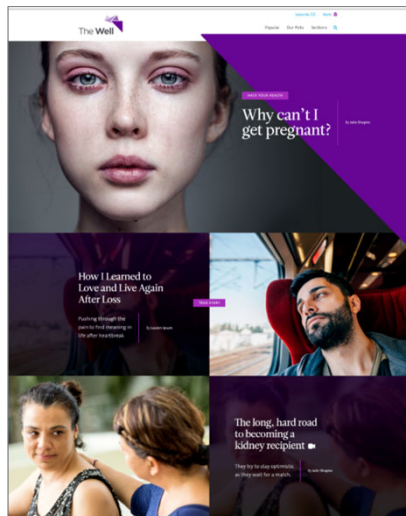
38

Our digital path forward...

In order to build a world-class website, our focus must be on **radical simplicity**, **personalization**, and, critically, a data-driven obsession on the **shopping and transacting experience**



Disruptive Healthcare Content Strategy



Journalism As Our Cultural Inspiration...

1. **Content Strategy** - Reimagine the use of content to build consumer engagement
2. **Engagement Approach** – Long format, photojournalist approach to content creation
3. **Content Creation** – World class journalist, strict editorial guidelines
4. **Distribution** – Social, Native, Digital, Organic, Influencers, Credit Rights

Journalist and creative partners

The Well: Contributor Roster

Last Name	First Name	Notes
Narula	Svati	
Harrington	Joy	
Behen	Donna	
Lombardi	Lisa	
Everett	David	

Logos: The Atlantic, USA TODAY, GOOD HOUSEKEEPING, npr, The New York Times, Outside, HUFFINGTON POST, Health, parenting, SELF, The Washington Post

nrc | Northwell Health | NRC Health Symposium | A journey to understanding | #NRCSymp | 41

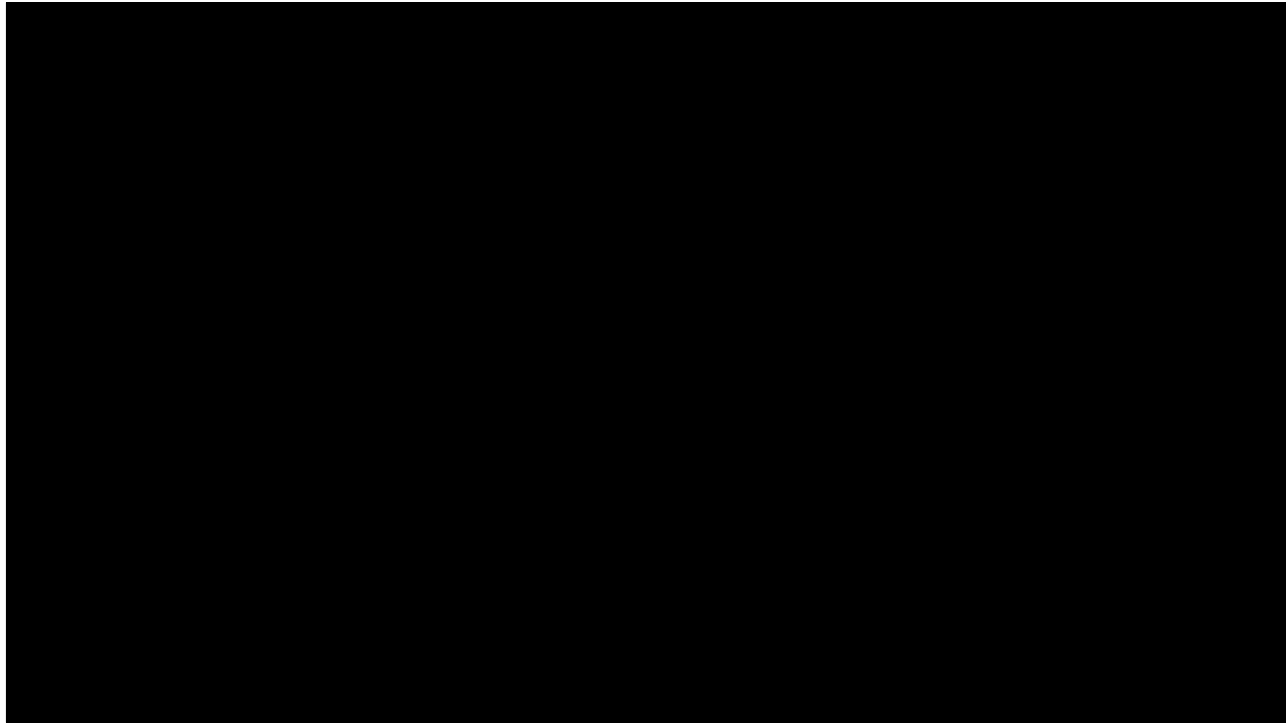
Side by Side

Alfonso Ribeiro

MUSIC PERFORMANCES

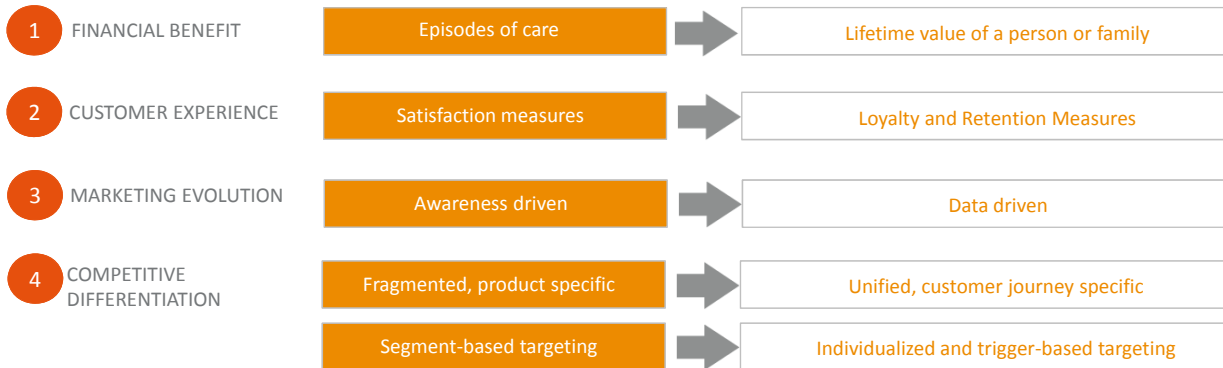
- THE ROCKETTES
- NAVY BAND

nrc | Northwell Health | NRC Health Symposium | A journey to understanding | #NRCSymp | 42



What is Next

Loyalty and retention will change the way we think about marketing to existing customers and set us apart from the competition



Thank You