

Marketing Measurement 101: Everything You Need to Know to Get Your Marketing Metrics Working for You

Allison Neikirk, Consumer Insights & Marketing Manager, UC Health
Mimi Rasor, President, Rasor Marketing Communications

Learning Objectives

1. Identify metrics within your organization that should be monitored and reported to measure paid, earned and owned media performance.
2. Establish a process to engage internal stakeholders, gather data and report marketing results.
3. Interpret marketing communications data to gain insights and inform decision-making.



Agenda for our time together

- About us
- Interactive poll
- Why to measure
- What to measure
- How to get started
- What the ongoing process looks like
- Where we are and what we've learned
- Q&A

UC Health

- Integrated academic health system serving the Greater Cincinnati & Northern Kentucky region.
- 4 inpatient campuses & nearly **60** outpatient locations
- **120** specialties & sub-specialties
- Over **1,130** licensed beds
- **1.8 million** visits & admissions in FY18
- **830** UC Health Physicians
- Over **9,800** employees

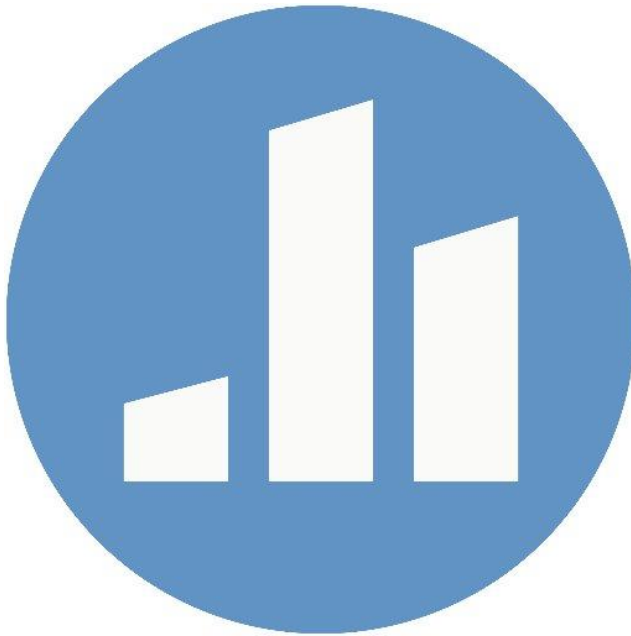


Rasor

- Cincinnati-based marketing communications firm with specific expertise in healthcare marketing strategy and measurement
- Established 2005



Quick survey from the room



Text **UCH** to **22333** to join

Why measure?



Budget



Marketing Spend



Time &
Other Resources



Customer
Insights



Internal Customers

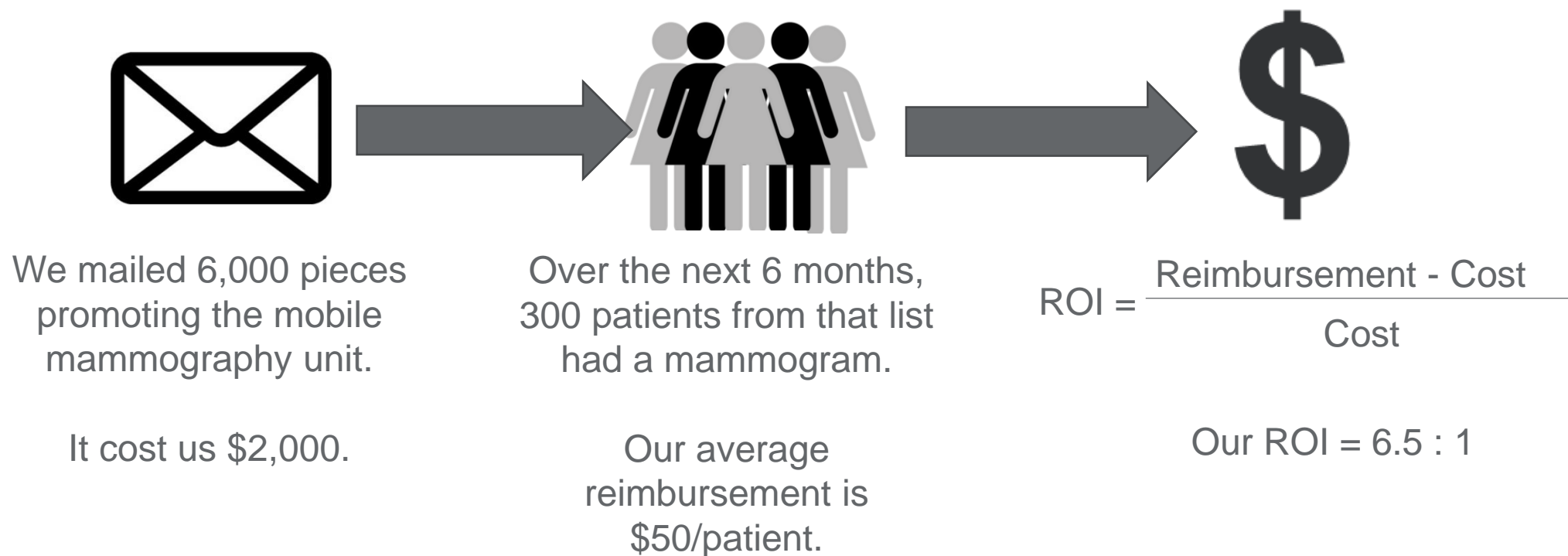
We measure to show that what we do as marketers matters.

- Adoption model



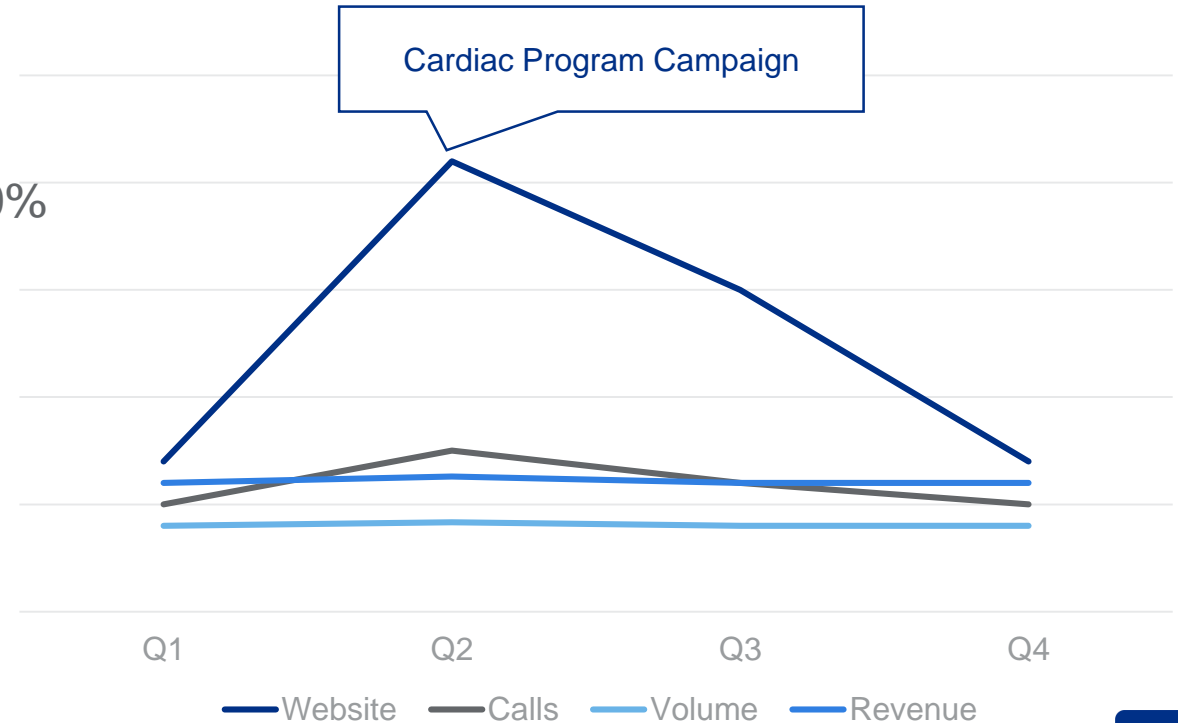
Quick review of measurement options

- Direct (one-to-one correlation)

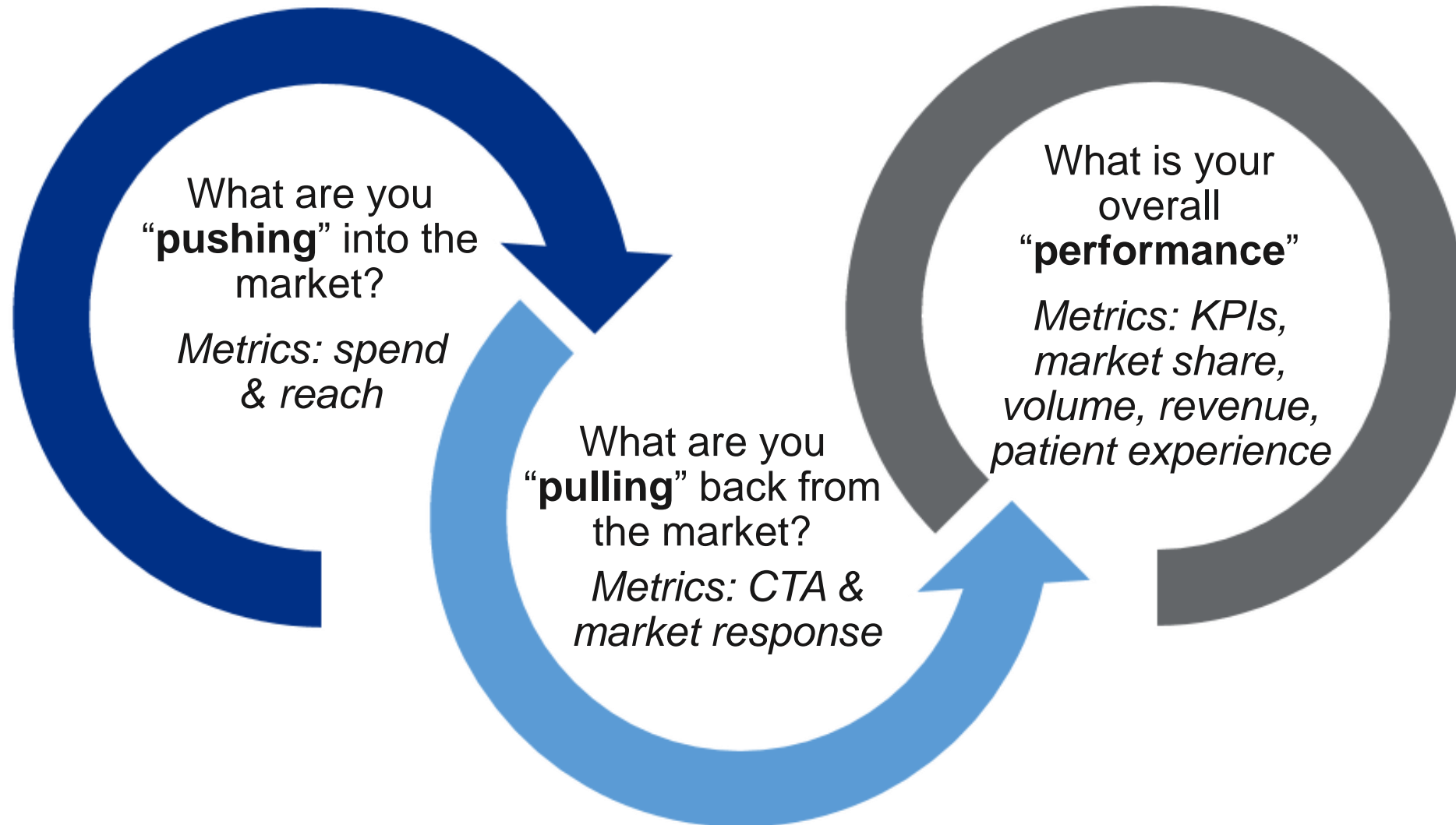


Quick review of measurement options

- Indirect (tracking market and volume trends vs. marketing efforts)
 - We spend \$100K in Q2 to promote our cardiac program
 - During that same period
 - Visits to our Heart Center website spike by 200%
 - Calls to our call center jump 50%
 - Volume trend is up by 4%
 - Revenue trend is up by 5%
 - Post-campaign, numbers all normalize back to previous levels



Simplify how you think about measurement



Roadmap to get your measurement process off the ground

Initial Set Up

Take inventory of your metrics and identify an initial dashboard data set



Identify and connect with internal subject matter experts (SMEs)

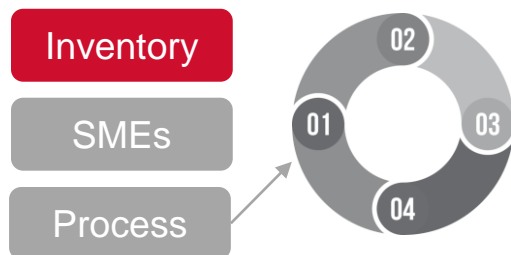


Develop a data collection process based on metrics needed



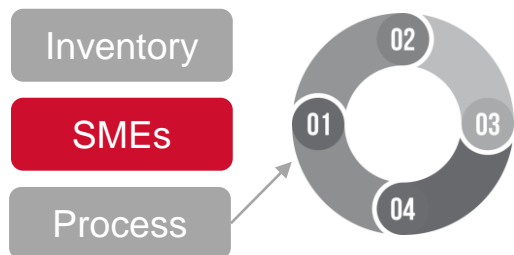
Inventory of metrics: start small and build

Push Metrics	Pull Metrics	Performance Metrics
<ul style="list-style-type: none">AdvertisingDirect mail & email marketingEventsSponsorshipsPaid, earned and owned media reach<ul style="list-style-type: none">website visitssocial media followers/fansmedia relations	<ul style="list-style-type: none">Social platform engagementWebsite CTR, time spent on site, etc.Call center volumeAppointments scheduledEmail marketing open ratesEvent attendanceConsumer awareness & preference	<ul style="list-style-type: none">Department KPIsMarket sharePatient volumeRevenuePatient experience



Identify and connect with SMEs

- SME = Subject matter expert
- Host a SME workshop to get on the same page
- Discuss purpose and need for marketing dashboard
 - We had yearly KPIs
 - We had segmented reports, but not a holistic view
- Discuss role of each SME:
 - Data ownership
 - Reporting process development
 - Data oversight and approval



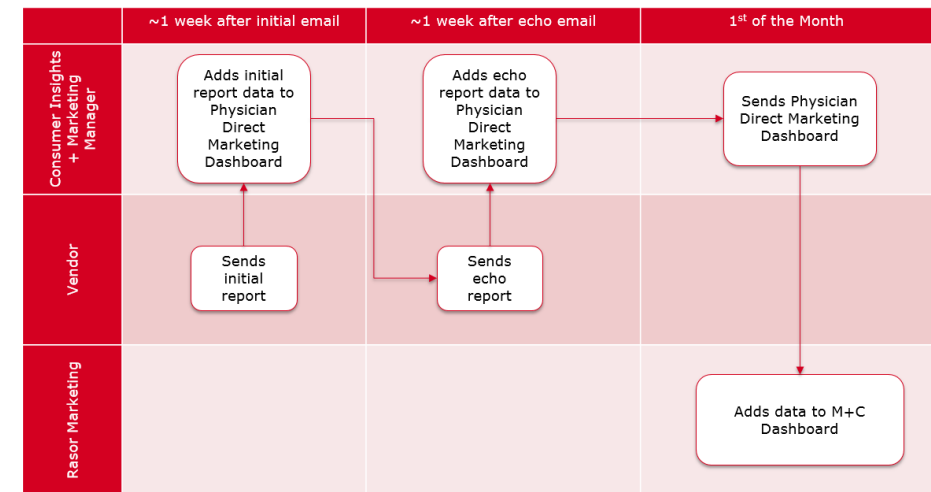
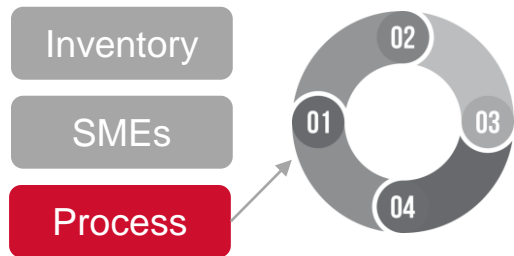
Excerpt from SME Workshop

WORKSHOP OBJECTIVES

- ✓ Ensure all SMEs know what the Marketing + Communications Dashboard is and how it will be used
- ✓ Provide an update on the progress on the Marketing + Communications Dashboard
- ✓ Provide the role and expectations of the SMEs
- ✓ Explain the Dashboard Playbook and its importance
- ✓ Kick-off the report catalogue
- ✓ Leave meeting with an understanding of action items and next steps.

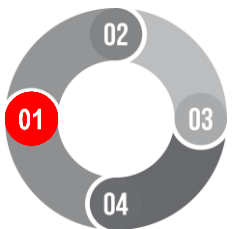
Develop a data collection process

- Discuss process and assign responsibilities
 - Many data points will likely come from existing reports
- Review how information will be shared internally and by whom
- Provide support for initial lift, as needed



Begin data collection process

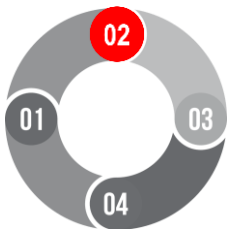
- Give yourself adequate time to gather the first round of data
- If you can go back one year, great; if not shoot for two quarters
- Weekly or bi-weekly check-in calls for 15-30 minutes to troubleshoot
- Determine reporting format



The image shows a screenshot of a 'Marketing & Communications Dashboard: Phase 1'. The dashboard is a large table with multiple columns and rows, organized into sections. The top section is 'Pilot Q1', followed by 'Pilot Q2', and then 'Pilot Q3'. Each section contains various data points, likely representing marketing and communications activities, with columns for dates, metrics, and status. The table is color-coded by section: green for Pilot Q1, blue for Pilot Q2, and yellow for Pilot Q3.

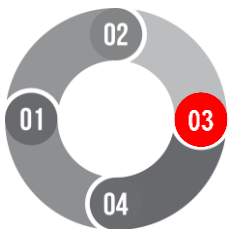
Analyze the data and pull in context

- Now that you have the data, what does it all mean?
- Calculate your CPM for each of your advertising media to see where you can gain efficiency without losing impact
- Look at trends; highs, lows, status quo; can you draw any hypotheses based on spend or reach that you can test?
 - What seems to be moving the needle with engagement and CTAs?
 - Is certain content on social spiking your engagement? Time of day? Media included?



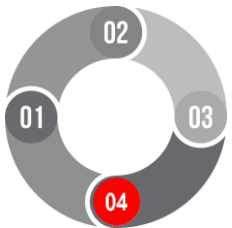
Report and optimize strategy

- How are you performing vs. annual KPI targets?
- Does performance suggest a shift in strategy?
 - Test and learn strategically.
 - Don't try to pull too many levers in the same area at once otherwise it's difficult to know the real driver of change.



Integrate within the organization

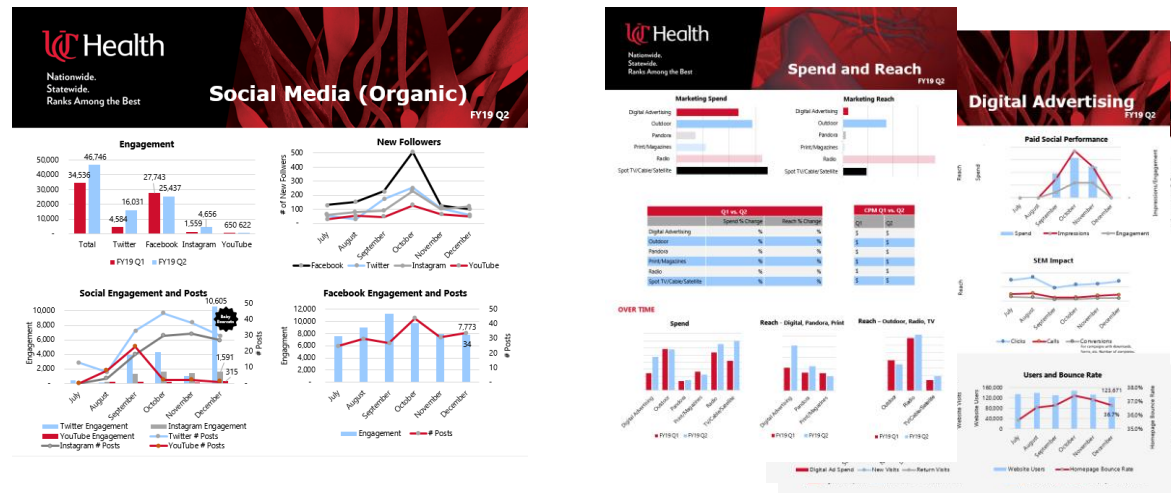
- You've done the leg work, now to ensure the dashboard is utilized
- Make marketing measurement a part of the culture and language
- Determine where it fits in existing processes and meetings
 - Department and leadership team meetings
 - Service line meetings
 - Strategic planning
 - Media planning



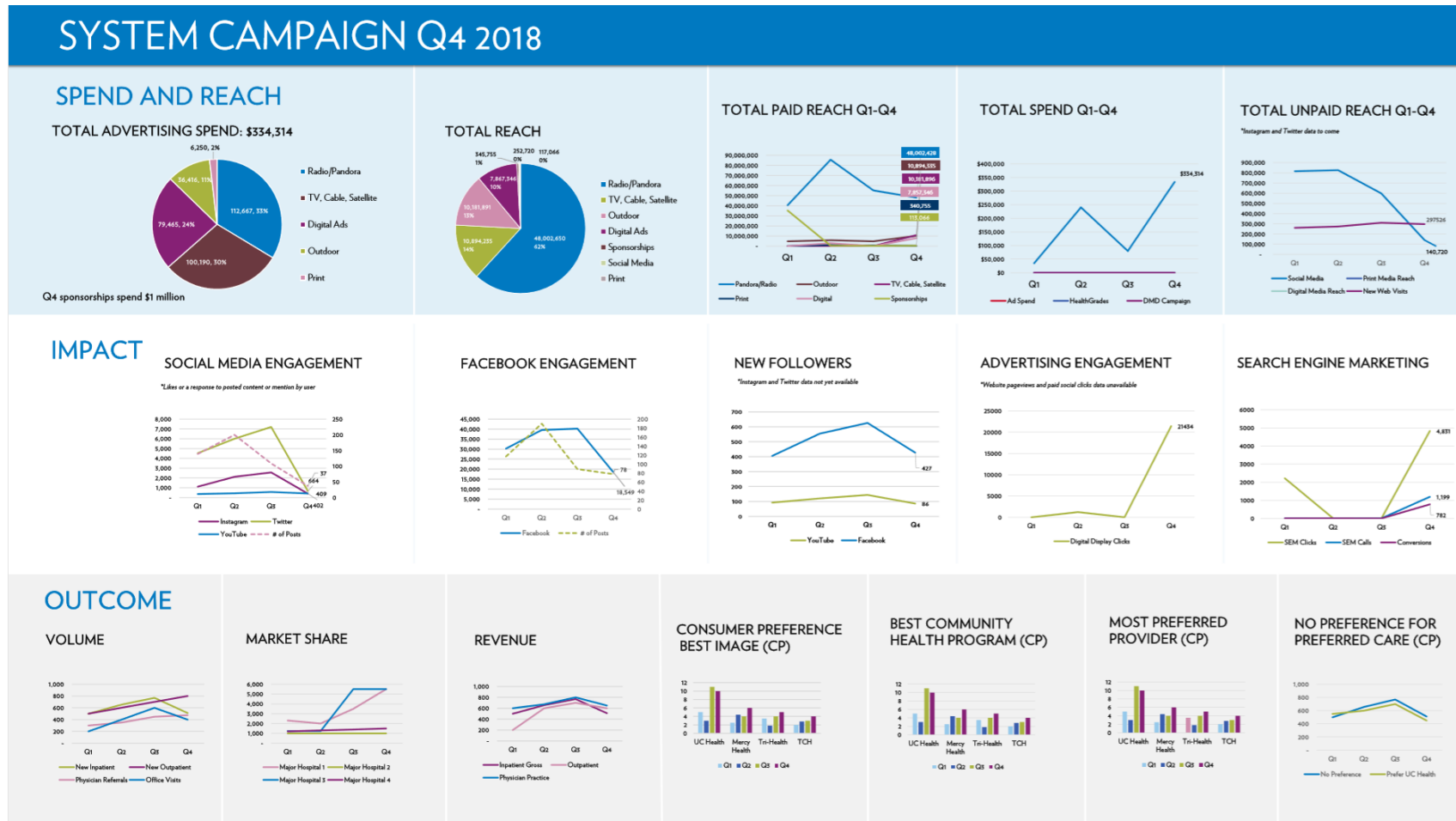
Where we are today - Integration

- The dashboard is in production and well received by all levels of the organization
- We are integrating the dashboard into standing meetings and building a test and learn mindset to continuously improve marketing efforts

Final Product



The format should reflect how your organization speaks to marketing



What we've learned

- It takes time, encouragement and senior backing to get this off the ground
- The kickoff meeting with SMEs is essential to share the vision of the dashboard and set clear expectations
 - You can't do this without them
- Once in place, the dashboard has been a go-to for annual and impromptu meetings
- In the end this saves marketing teams time as ad hoc requests have declined with the benefit of having everything in one place

Three Key Take-Aways

1. Simplify how you think about measurement
2. Test and learn strategically
3. Integration is key



Questions?

Please be sure to complete the session evaluation on the mobile app!

Speaker Biography



- Allison Neikirk
 - Consumer Insights & Marketing Manager, UC Health
 - Allison.Neikirk@UCHealth.com
 - Allison is the Consumer Insights & Marketing Manager at UC Health. Allison has worked in healthcare for nearly a decade. She currently serves as point person for performance monitoring, reporting capabilities, CRM system programs, data visualization and goals alignment. She also supports the packaging and synthesis of market research, including key insights and data storytelling.

Speaker Biography



- Mimi Rasor
 - President, Rasor Marketing
 - mimi@rasormarketing.com
 - Mimi is a Cincinnati-based public relations and marketing professional with nearly 30 years of experience. As founder of Rasor Marketing Communications, she has overseen management of the agency's local, regional and national clients in a number of industries since 2005.

Mimi's background includes management of marketing communications research, strategy and planning in both agency and corporate settings. Her experience ranges from healthcare, working with physicians and integrated healthcare delivery systems, to B2B marketing strategies for both large and small businesses, as well as public relations and community outreach for large public entities.