

FEATURED SPEAKERS



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M.B.A.**

Senior Vice President,  
Marketing &  
Communications



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Program Manager of  
Marketing Research &  
Analytics



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# Digging into NRC Market Insights to inform strategy, set goals, and be courageous

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Senior Vice President, Marketing & Communications, OSF HealthCare

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Program Manager of Marketing Research & Analytics, OSF HealthCare



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**27<sup>th</sup> Annual NRC Health Symposium – Omni Nashville Hotel**  
**Nashville, Tennessee**  
**August 4–6, 2021**

## Susan Milford

Senior Vice President of Marketing & Communications

Three things about me:

1. Grandma is my favorite role since becoming one four years ago
2. I'm a diehard Chicago Cubs & Bulls fan
3. Showing strategic marketing drives results in health care is my passion



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## Objectives

- Demonstrate value of strategic marketing by using NRC data to set goals and report on impact to strategic initiatives
- Analyze more than the dashboard to get a fuller picture of your communities
- Identify "The 5 C's of Health Care Consumer Choice" and the NRC Brand Loyalty Index



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# Overview of OSF HealthCare & MarCom

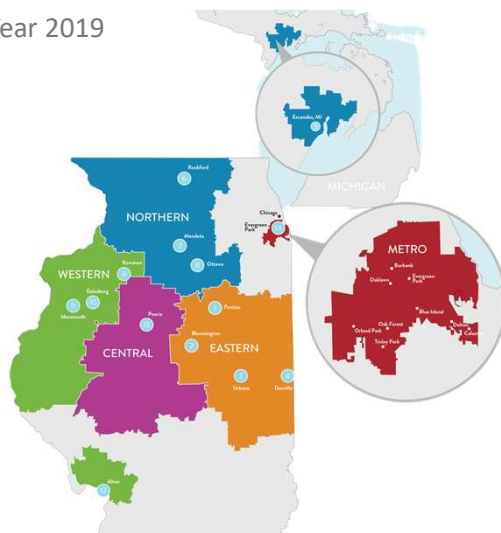


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## By the Numbers

Fiscal Year 2019



<b>145</b> Locations, Including Hospitals	<b>1,753,176</b> Outpatient Visits
<b>2,097</b> Licensed Hospital Beds	<b>2,291,168</b> Physician Enterprise Visits
<b>1,055</b> Employed Physicians	<b>81,047</b> Inpatient Admissions
<b>664</b> Advanced Practitioners	<b>2,944</b> Hospice Patients
<b>23,601</b> Mission Partners	<b>866,868</b> Persons Served
<b>294,770</b> Home Health Annual Visits	<b>\$3.1B</b> Net Revenue



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# Integrated health care



## Digital Health

- Ambulatory Care**
- Virtual Visits
  - Clinician to Clinician
  - Remote Monitoring
  - Health Apps
- Acute Care**
- Virtual Visits
  - Clinician to Clinician
  - Remote Monitoring
  - Health Apps

## Systemwide service lines

- Cardiovascular**
- Neurosciences**
- Women's and Children's**
- Oncology**
- Surgical Services**
- Emergency Medicine and Hospital Medicine**
- Community Medicine**
- Medical Specialty**
- Behavioral Health**

## Ambulatory Services

- Ambulatory Care Sites**
- 11 Centers for Health
  - 17 OSF PromptCare locations
  - 15 OSF OnCall Urgent Care locations
  - 120+ OSF Medical Group locations
- Home Health Services**
- OSF Rehabilitation**

## HOSPITAL

- Joint Ventures**
- 3 Ambulatory Surgery Centers**
  - 2 Imaging Centers**
  - 2 Cancer Centers**
  - 1 Urgent Care entity**
  - 6 Other/Non-clinical**

## Support Services

- OSF Aviation**
- Medical Education**
- Preferred Skilled Nursing Network**
- Ministry Shared Services**



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# MarCom Vision Statement

To *inspire* **TRUST**  
 in the  
 OSF HEALTHCARE BRAND  
 and  
*motivate* **THOSE WE SERVE**  
 throughout their  
 HEALTH AND WELLNESS  
*journey.*



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# MarCom's Collaborative Approach



**1 Opportunity**  
Operational opportunity  
Strategic Planning/Initiative Lead  
Research discovery  
Marketing & Communications

**2 Insights**  
Data driven observations  
Marketing & Communications,  
Strategic Planning/Initiative Lead,  
Healthcare Analytics

**3 Decision**  
Operational decisions  
Strategic Planning/Initiative Lead,  
Marketing & Communications  
(consult)

**4 Development**  
Points of entry journey map  
**Marketing & Communications,  
Strategic Planning/Initiative Lead**  
Product/service development  
Strategic Planning/Initiative Lead, Operations,  
Marketing & Communications

**5 Market**  
**Strategic marketing plan development**  
Marketing & Communications,  
Strategic Planning/Initiative Lead

**Implement marketing plan**  
Marketing & Communications

**6 Results**  
**Actionable outcomes**  
Marketing & Communications,  
Strategic Planning/Initiative Lead,  
Healthcare Analytics



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# The Strategic Brief

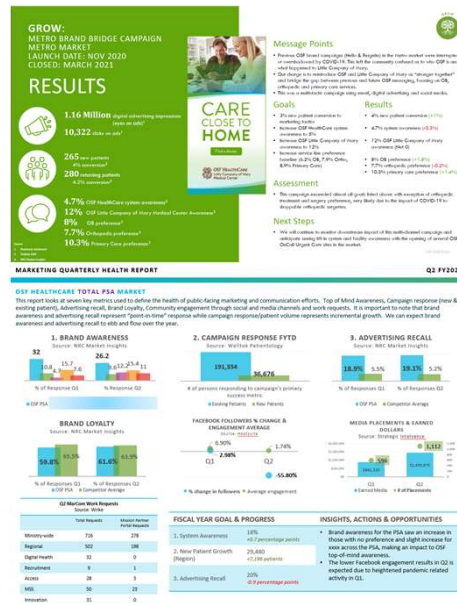
The image displays a grid of 12 screenshots from a 'Strategic Marketing Brief' document. The screenshots show various sections such as 'Executive Summary', 'Objectives', 'Audience', 'Market Analysis', 'Competitive Landscape', and 'Implementation'. Each screenshot contains detailed text, tables, and diagrams related to the marketing strategy.



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# Delivering Results



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# Growing our Insight Garden with NRC



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## A great reminder...

“For years now, consumers have made consistent appeals for **autonomy**, for **convenience**, and for **freedom of choice**. They’re not looking for top-down, authoritative relationships with providers. They’re looking for **partnerships** – relationships that respect their time and their judgement, that deliver an excellent experience, and that pursue a sense of meaningful human connection.”

– NRC HEALTH 2021 CONSUMER TRENDS REPORT

## Hearing from the patient to inform...

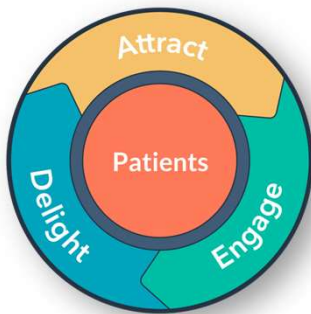
# COVID Impact: Brand Loyalty – Patient Trust

- Over the course of COVID, data for the OSF primary service area has shown a steady **increase in No Preference** – and a **reduction in Brand Preference**  
[Source: NRC COVID-19 Report]
- This reflects **competitive barriers coming down** as universal respect has risen for the *collective* role health care has played during COVID – opening a door to connect with *No Preference* audiences
- Simultaneously, COVID has **driven trust in health care** with a 9% increase in positivity  
[Source: NRC COVID-19 Report, filtered to the State of Illinois; 7/2020-12/2020]
- Opportunity lies in targeting those with no preference with –
  - Convenience – Location, digital options, telehealth  
(OSF OnCall Urgent Care, Chatbot Clare, MyChart, Online Scheduling)
  - Commitment to providing **personalized health care experiences** born from our Mission and Vision
  - Continuum of care driven by the dedicated human connection our Mission Partners are committed to provide



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# Ministry-Wide Content Strategy

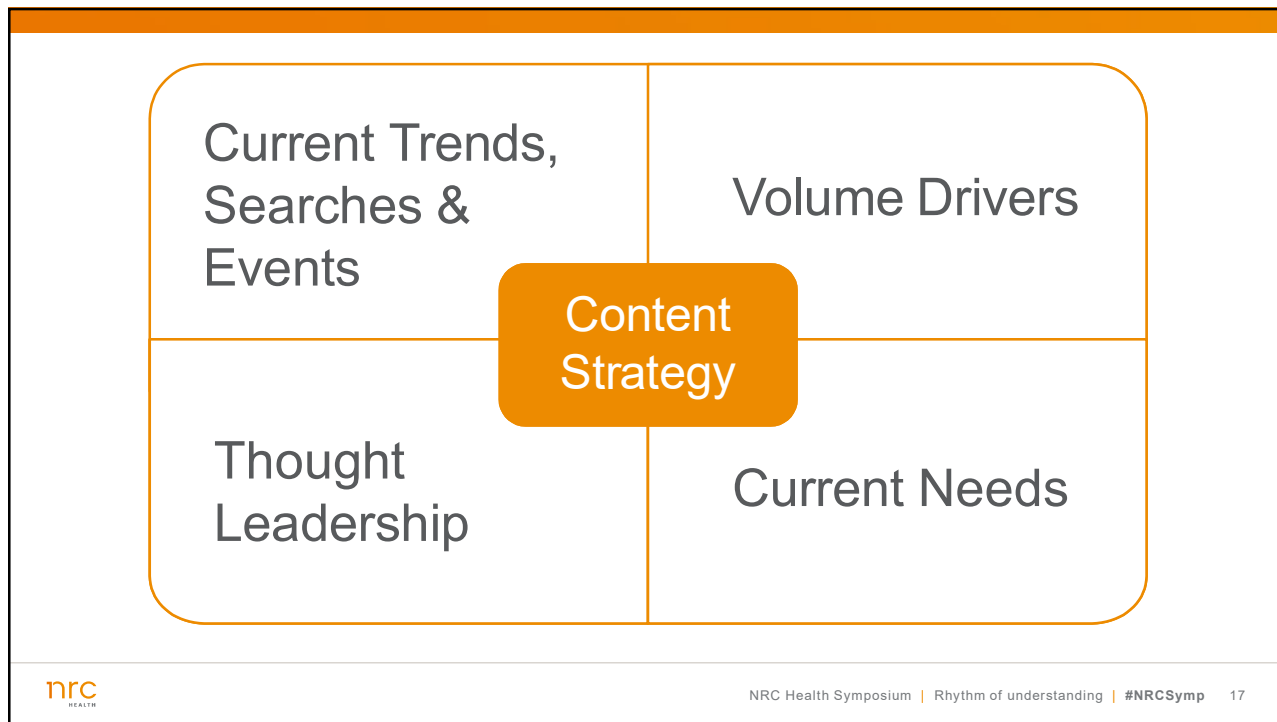


When they ask...  
and, we answer...  
it builds **TRUST**



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# Crisis Communication

## 5 TIPS

on talking about COVID-19 vaccines with friends and family

- 1 Listen to their questions with empathy.
- 2 Ask open-ended questions to explore their concerns.
- 3 Ask permission to share information.
- 4 Help them find their own reason to get vaccinated.
- 5 Help make their vaccination happen.

OSF HEALTHCARE  
Source: U.S. Center for Disease Control and Prevention

### Frequently Asked Questions

Catholic Values	General Questions	Vaccine Safety
Supply & Availability	Who Can Get the Vaccine?	After Receiving the Vaccine

**Catholic Values**

What is the position of OSF on the vaccines and the use of fetal cells? +

**General COVID-19 Vaccine Questions**

What do we know about COVID-19 vaccines? +

Why should I get the COVID-19 vaccine? +

How effective are the three COVID-19 vaccines? +

Will I have to pay for my COVID-19 vaccine? +

How do the COVID-19 mRNA vaccines work? +

OSF HealthCare was live. April 27 · 📺

Join pharmacist Brian Laird and primary care provider Maryann Fisher, MD, as they answer your questions about the COVID-19 vaccines. Have a question? Ask it in the comments, and our team will answer it during the event.

nrc HEALTH | OSF HEALTHCARE

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**OSF OnCall**  
URGENT CARE

Talk to Us Now | In-Person Visit | Virtual Visit

# New Product Development

## NEW NAME

Same convenient urgent care

**nrc** HEALTH | **OSF HEALTHCARE**

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# Service Area Exploration

**nrc** HEALTH | **OSF HEALTHCARE**

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## Service Line Strategy



## Campaign Planning

### Creatives –

#### Bowl

Things have changed.  
Cancer hasn't.

Stolen challenges have taught us to be more careful. We know we're being seen and it's personal. It's a challenge. It's a reality. It's a war. We're not alone in this. We're all in this together. We're all in this together. We're all in this together. We're all in this together.

While challenges in our past are... there is a way to win. It's a war. It's a war. It's a war. It's a war.

#### Weights

Things have changed.  
Cancer hasn't.

We've had a new vision of health. It's not just about living longer. It's about living better. It's about living better. It's about living better. It's about living better. It's about living better. It's about living better. It's about living better.

To make your journey, you... and we're all in this together. We're all in this together. We're all in this together. We're all in this together.

#### TP

Things have changed.  
Cancer hasn't.

We've learned to be grateful. We've learned to be grateful. We've learned to be grateful. We've learned to be grateful. We've learned to be grateful. We've learned to be grateful. We've learned to be grateful. We've learned to be grateful.

Check why we're getting... and we're all in this together. We're all in this together. We're all in this together. We're all in this together.



## Dig Deep



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### Andrea Bonk

Program Manager of Marketing  
Research & Analytics

Three things about me:

1. Coffee, please.
2. Amateur photographer
3. Traveler to out of the way places

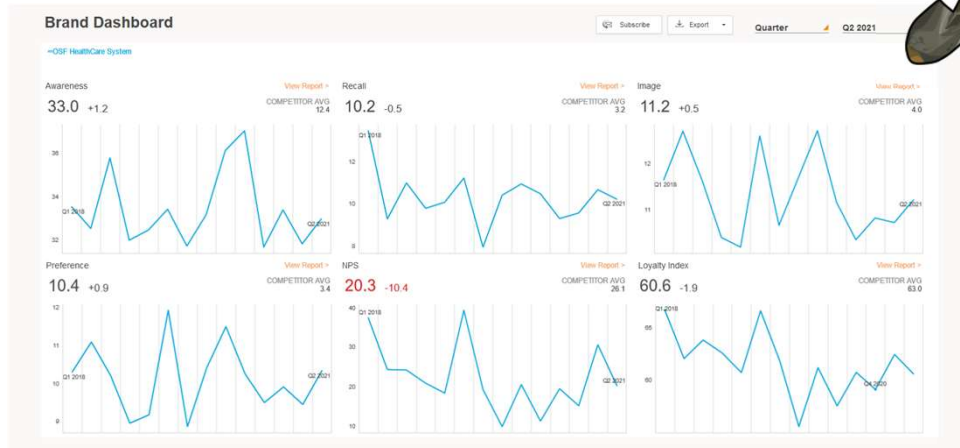


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# Digging Beyond the Dashboard



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# Setting Accountable Metrics



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# Setting Accountable Metrics

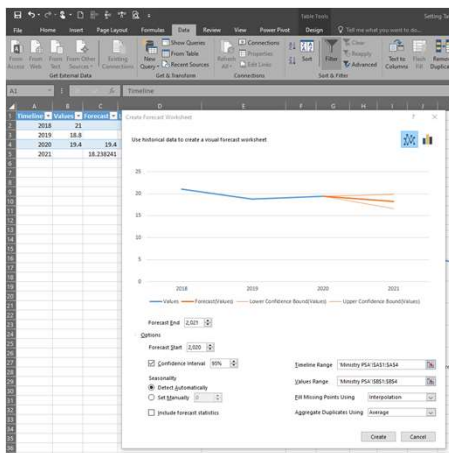
- Awareness**
- Preference**
- Advertising Recall**

Forecast Sheet

TOM Awareness Hospital (ranking report)							
Column1	2018	2019	2020	Trends	Forecast	Upper Confidence Bound	Target
<b>Service Line Preference</b>							
Cardiovascular							
Neurology							
Cancer							
Pediatric							
Women's							
Primary Care							
<b>Advertising Recall (Branding Dashboard)</b>							
Brand Market Ad Recall	2018	2019	2020	Trends	Forecast	Upper Confidence Bound	Target

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# Use Excel to Forecast

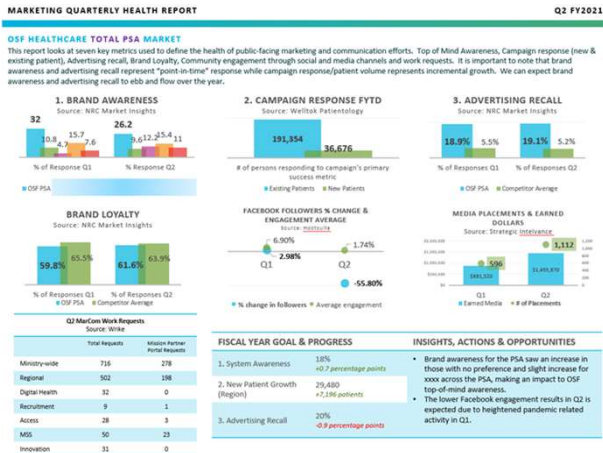


- At least 3 data points for evenly spaced timeframe and results
- Review upper and lower results with key stakeholders to set targets

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# Sharing Accountable Metrics

→ Define your standard KPI to monitor



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# Campaign Performance



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## Monitor Campaign Performance with Ad Hoc Reporting

- Adhoc Reporting
- Select Trending
- Split by Question
- Select only your brand as competitor
- Choose questions to monitor trends



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## New Product Development



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# New Product Development



## What to check...

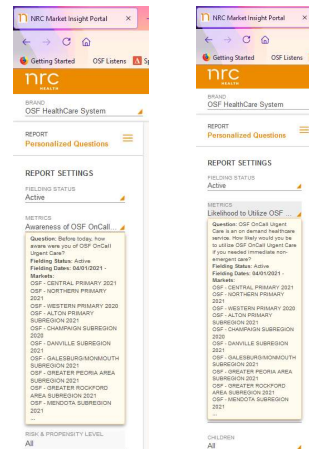
- Local system loyalty
- What's important in choosing a doctor
- Innovation readiness
- Loyalty drivers
- Preference indicators (if appropriate)
- Online reviews/ratings for shoppable services
- Reputation



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# New Product Development follow-up

- Personalized Questions FTW
  - How aware are you of OSF OnCall Urgent Care?
  - How likely are you to try OSF OnCall Urgent Care?



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## Getting to know your consumers



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## New Service Area Exploration



### Ranking Report & Consumer Behavior

- Demographics
- Behaviors
- Health Profiles
- Innovation Readiness
- Communication Preferences

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## New Service Area Exploration



### Competitive Analysis

- Brand Dashboard
  - Awareness
  - Preference
  - Image & Reputation
  - NPS
  - Brand Loyalty Drivers
- Brand Personality
  - Distinction
  - Value

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## Service Line Strategy



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# Developing Future Strategies for Service Lines



## Modules, Modules, Modules

- Work with your CSM
- Modules ask probing questions like:
  - How far willing to travel
  - Assumptions consumers have about a service
  - Desire for a service
  - What's important to consumers

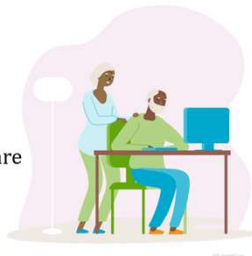
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# What can it look like?

## WHEN SELECTING A DOCTOR, WHICH OF THE FOLLOWING WOULD BE MOST IMPORTANT TO YOU?

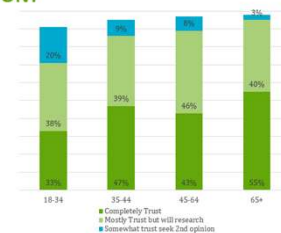
TOTAL OSF PSA – TREND FY 2018 THROUGH MARCH 2021

- 65%** Listens to me
- 60%** Explains things well
- 53%** Provides high quality care



## WHEN YOUR PRIMARY CARE DOCTOR RECOMMENDS SOMETHING TO YOU, WHAT DESCRIBES YOUR LEVEL OF TRUST IN HIS/HER RECOMMENDATION?

STATE OF ILLINOIS RESULTS



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## Inspiration from Brand Loyalty



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## Brand Loyalty Index



### Seven for the price of one

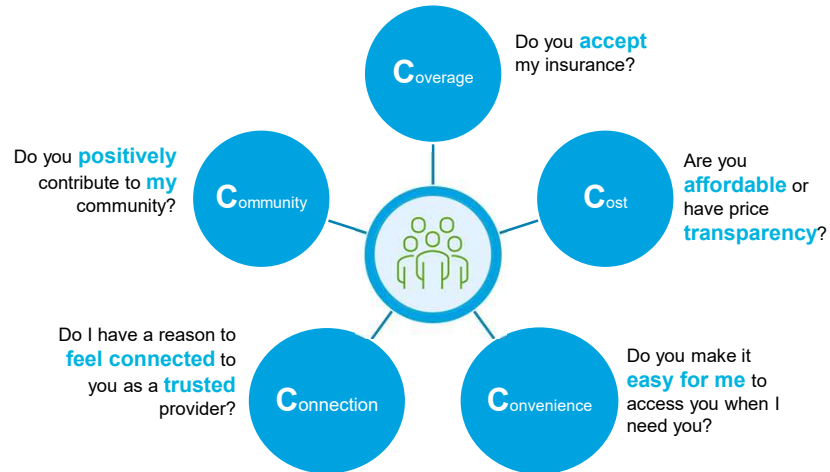
- Set timeframe at a year
- Choose brands/markets
- Compare to benchmarks
- Set Goals
- Define Focus Efforts

Market Average: National

Brand Loyalty Index	Brand Score	Engagement Score	Need Score	Access Score	Motivation Score	Experience Score	NPS Score
57.2	72.1	26.0	77.6	60.6	65.2	80.6	18.6

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## The 5 C's of Health Care Consumerism



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# Questions?

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