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**Title:** Patient Portal Marketing Plan

**Author:** Jim Meyers, DrPH

**Context for Use:** This guide provides detailed information on developing patient portal marketing plan for community health clinics.

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# Marketing a Patient Portal In Community Health Clinics

*Jim Meyers, DrPH*

Patient Portal Coach

[jimmeyersdrph@gmail.com](mailto:jimmeyersdrph@gmail.com)

## Introduction

Recent studies show the numerous benefits of patient portals to providers and patients of health clinics. Effective introduction of these websites has the potential to improve the quality of healthcare by encouraging patients to communicate electronically and securely with their provider, view their medical records and test results, request appointments, pay bills, refill prescriptions, access useful health information and many additional and emerging functions. For providers, the portals may help encourage patients to more active participants in their own care, enhance patient-provider communication, increase patient satisfaction, and improve the efficiency of care delivery.

This marketing plan provides basic framing for managing a marketing program for a patient portal through three distinct phases - pre-launch, launch and optimization. Even the best-designed portal may not achieve the aims of robust patient enrollment and active usage without a structured marketing plan that provides a road map for introducing this new service in a community health clinic. This plan is intended to provide such a road map to assist clinics that have decided to launch a portal or re-launch efforts to improve use. It is designed to provide a comprehensive guide that can be followed in whole or in part, to make easier the process of rolling out the website.

## The Pre-Launch Phase

**Overarching Theme:** Choose a theme that will guide marketing during all phases of the patient portal. Examples: “My Health Care Online” or “My Health Record Online”

**Phase Theme:** Develop a theme for this phase that relates to the goals your clinic wants to accomplish. Theme Examples: “Getting On Board with Online Health” or “Countdown to Launch”

**Target Market:** A small group of test patients and several providers.

**Positioning Statement:** Effective introduction of patient online access, or a patient portal, has the potential to improve the quality of healthcare and enhance the patient experience. Building knowledge of the portal's benefits and achieving broad acceptance and participation of the patient website during the pre-launch period is important to the success of the project.

**Offering to Customers:** Opportunity to be first test group of online services and resources.

**Timeline:** Six-month period prior to launch.

**Distribution:** Test patients only.

**Service Strategy:**

Have representatives from information technology, medical and administrative staffs guide test patients and providers through each step of website use. Plan workflow for handling each type of portal request (requesting appointment, provider e-mail, etc.) and schedule advance training of all staff.

Because the initial user experience is crucial to acceptance, develop workflow for responding to messages no later than 24 hours after they're received. (Use test patients to evaluate during this period with goal of *improving* response experience from prior experience.)

**Communications Strategy:**

Communication activities during this phase help to build awareness, anticipation and enthusiasm about the patient website.

- Use posters, brochures and other materials. Potential benefits of the patient website include enhanced patient involvement in their own health.
- For clinic staff, materials should highlight benefits including higher patient satisfaction, improved loyalty and satisfaction for physicians, nurses and other caregivers, and better retention of both patients and clinic staff.
- Communications should also anticipate potential barriers to acceptance among physicians, nurses and other caregivers, such as "This is another demand on my time." Explain how portal can enhance patient-caregiver communications and improve care efficiency.
- When preparing communication materials, consider referring to the patient website as something other than "portal," as that term may not be easily understood by patients and could be a barrier to acceptance. Choose a term that resonates with patients, such as "Your Health Online" or "[Your Clinic Name] Online."
- Consider a "naming contest" for the website for clinic staff, with a small prize or incentive.

**Communication Tools:**

The following recommendations are designed to build anticipation and increase awareness of the benefits of the website.

- Put up posters in provider and staff work areas that describe the benefits (“Fewer phone calls!”) of the website and set up expectations for launch date (“Your Health Online Arrives on July 1!”)
- Place posters in the waiting room to introduce website and simply describe its benefits, such as “24-hour Access to Your Electronic Health Record,” “Safely Email your Physician,” and “Easily Access Your Lab Results at Home.”
- Place PowerPoint slideshow in provider/staff break area to explain features of portal to build anticipation and awareness.
- Schedule all-staff meeting to discuss details of product rollout.
- Create and post a “Countdown Clock” 30 or 60 days prior to launch as reminder of project deadlines and to build anticipation. Choose highly visible location in non-patient area, such as a break room.
- Prepare information handouts and/or handbooks for clinic staff.
- Provide “one-on-one” training sessions for clinic staff.
- Provide e-mail updates and reminders to keep staff informed about timetable for launch, website features and related activities.

**Promotion Strategy:**

- Identify “champions” among providers and administrative and technical staff who enthusiastically support and can effectively communicate benefits to others.
- Identify “non-enthusiasts” who are skeptical of project and could potentially derail efforts. Engage with them to make sure they understand implementation plans and benefits in context of overall clinic mission and goals.
- Use staff meetings to introduce the project, assess staff acceptance and provide regular progress reports on implementation and launch. Solicit questions and input from staff throughout the process.

**Marketing Research:**

- Conduct market research to assess community needs and best practices. What portals are “competitor” health organizations using? What has worked or not worked? What improvements can be made by your organization?
- Develop patient questionnaires or surveys to assess patient awareness and solicit input about what portal features would be most useful to patients.

**Feedback Strategy:**

- Regularly meet with test patients and providers to discuss user experience, questions and suggestions.
- Solicit ongoing feedback from clinic staff via e-mail, during one-on-one training or group “hands-on” training.

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## *The Launch Phase*

**Phase Theme:** Develop a theme for this phase that relates to the specific goals around launch of the portal. Examples: “Ready, Set, *GO ONLINE!*” or “Your Online Medical Record is Here!” or “Take Charge of Your Health.”

**Target Market:** Current and new patients and all providers.

**Positioning Statement:**

Welcome to the patient portal: a safe, secure website where patients and their families can view a patient’s medical record, privately communicate with their physician office via e-mail, request appointments and prescription refills.

**Offering to Customers:** Depending on the portal features at launch, these can include:

- Access to electronic health record
- Secure e-mail communication with doctor and other caregivers
- Access to laboratory test results
- Request appointments and prescription refills
- Health education information

**Timeline:** Launch and subsequent 3 months.

**Price Strategy:** Free.

**Distribution:** Current and future patients. Also people within the community looking for a new physician and care site.

**Service Strategy:**

- Respond to patient e-mail to providers, requests to schedule appointment or refill prescriptions within 24 hours.
- Respond to requests for technical assistance, such as sign-on/password issues, within 24 hours.

### **Communication Strategies:**

Communication strategies during this phase should focus on promoting the availability of the portal, its features and benefits, and that sign-up is free.

- Have a “Launch Day” promotion that includes posters, postcards, contests and/or giveaways.
- Develop “pitch” e-mail and contact the local newspaper, local news website, TV or other outlets that are most suitable for reaching patient population.
- Develop short, 3-4 sentence, easily memorized “elevator pitch” for clinic providers and staff to use for communication with patients. Some staff may not need or want to use elevator pitch, while others may be more comfortable “knowing what to say.”
  - (Elevator Pitch Example:
    - *“Mrs. Jones, did you know we just started an online website for patients that can help you with some of your health needs? It’s called XXXX, and it’s free. The website lets you safely email your provider, view your lab results online as soon as they’re available and request office appointments and prescription refills. If that’s something you’re interested in I have more information on how to sign up; it’s really easy.”*
- Provide information to patients while they are in the office by using administrative staff, providers and/or volunteers to actively encourage sign-up, Prepare simple, step by step “how-to-sign-up” handouts for distribution to patients at clinic and for publication on the portal website. Should include portal web address, access log-in codes, how to get “help” for portal issues.
- Create *Frequently Asked Questions* document to distribute to patients and publish online on clinic and portal websites. (Content should be simple, clear and concise. Avoid lengthy descriptions and excess detail that may be intimidating to users.)

### **Communication Tools:**

- PowerPoint slideshow running “on loop” in patient waiting room displaying key features of portal and how to sign-up information.
- Posters and postcards placed in waiting room and exam rooms displaying features of portal, sign-up information and QR codes to access portal from smartphones. A QR code is a bar matrix barcode, readable by QR scanners, mobile phones with a camera and smartphones. By creating a QR code, patients can scan a QR code and be taken directly to the portal home page to view information or sign up.
- Include stickers on appointment sign-up sheet with portal address.
- If the clinic has a Facebook and/or Twitter page, post “Portal News” (highlighting current features, planned new features or “patient testimonials.”) Include address and sign-up information.

- On-hold telephone voicemail that tells caller what the portal does and how convenient it is, that it would enable them to handle many issues 24/7 online instead of by phone, and what to do to sign up.
- Add Portal News section to clinic website home page.

#### **Promotion Strategy:**

- Develop a contest for office staff with prizes/giveaways or other incentives for signing up the most patients in the first month after launch.
- When portal goes live, have a launch party focused on patients, offering food and/or beverages, with chotskies and/or a drawing for a larger prize, possibly donated by local business. (Donated Gift Examples: \$25 gift card from local grocery store or retailer, month's supply of diapers, free ticket to children's amusement venue, \$25 worth of school supplies for August/September launch, etc.)
- Develop messaging for posters, banners and posting on website that highlight specific features of the portal that would appeal to clinic's patient population. (Example: If clinic has large population and working mothers and children, messages could include "Not Enough Time for All the Things You Need to Do? The (Patient Portal Name) Can Help."

#### **Marketing Research:**

- Track overall sign-ups weekly.
- Track in-office sign-ups by office staff and provider who interacted with patient.
- Track portal usage by enrollees monthly.
- Track response times to patient questions about technical assistance.
- Track response times to patient e-mails to providers and question topics (interpretation of lab results, post-office visit follow-up questions, medication questions, general queries re symptoms.)

#### **Feedback Strategy:**

- Provide "feedback buttons" on each portal page for immediate usability information.
- Consider feedback emails to new signees after enrollment to capture user experience; examples of questions are: How easy was it to log-in to the portal the first time? (1-5 rating); If you looked for specific information, such as requesting an appointment, how easy was it to complete the process (1-5 rating).
- Consider tracking patients' office calls to determine if there is a decline over time; a drop in calls would provide "proof point" re promised benefit to clinic staff of reduced phone calls.
- Test patients and providers would continue regular meetings to provide ongoing feedback.

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## *The Optimization Phase*

**Phase Theme:** Develop a theme for this phase that relates to the goals your clinic wants to accomplish. The tactics will support those goals. Theme Example: “Getting On Board With Online Health” or “Getting the Most From Your Online Health Record.”

**Target Market:** Current, new and prospective patients.

**Positioning Statement:** Join hundreds of other clinic patients in enjoying the convenience and benefits of the patient portal. Many patients like you are taking charge of their health and that of their families by signing up for the safe, secure website where you can view your medical record, privately communicate via e-mail, request appointments and prescription refills.

**Offering to Customers:**

- Easily download electronic health record
- Secure e-mail communication with doctor and other providers
- View laboratory results, health information and education.
- View available appointment times and request appointments for specific providers.
- View medical lists and request prescription refills.

**Timeline:** 3-9 months post launch

**Price Strategy:** Free.

**Distribution:** Current and future patients.

- Respond to patient e-mail to providers, requests to schedule appointment or refill prescriptions within 24 hours.
- Respond to requests for technical assistance, such as sign-on/password issues, within 24 hours.

**Service Strategy:**

- Route all portal requests through normal clinic operations.

**Communication Strategy:**

Communication strategies during this phase should focus on explaining the ongoing convenience, benefits and features of the portal, utilizing ongoing “learnings” from market research and patient and provider testimonials.



**Communication Tools:**

- PowerPoint slideshows with embedded video. Embedded video adds viewer interest and ability to include patient and provider testimonials, which can make the video more compelling and persuasive as a communication tool.
- Posters, postcards, brochures.
- Stickers on patient appointment sign-in sheets.
- Send reminders about appointments and health education messages to website enrollees who “opt in” to receive text messages from the clinic.

**Promotion Strategy:**

- Develop messaging for posters, banners and posting on website that highlight patient and provider experiences with the portal and appeal to clinic’s patient population.
- Display PowerPoint with embedded video that highlights patient and provider experiences.
- Personalized follow-up or thank-you cards to online users
- Special promotions for enrollees, such as flu shots a day earlier.
- Use portal to deliver health messages targeted at specific populations (seniors, new and expectant mothers, people with chronic conditions (asthma, obesity or diabetes), or frequent users of emergency room services.

**Marketing Research:**

- Research best practices in market area; determine changing SWOT for portal adoption and clinic enrollment/disenrollment of patients.
- Track overall sign-ups weekly.
- Track in-office sign-ups by office staff and provider who interacted with patient.
- Track portal usage by enrollees monthly.
- Track response times to patient questions about technical assistance.
- Track response times to patient e-mails to providers and question topics (interpretation of lab results, post-office visit follow-up questions, medication questions, general queries re symptoms.)

**Feedback Strategy:**

- Survey providers and staff on marketing and usage. (Examples of questions: What is working and what is not to initiate sign-up? Verbal feedback from enrolled patients during office visits? Provider sentiment re how portal impacting provider-patient relationships. Improved care).
- Assemble advisory group composed of users to meet regularly with the portal launch team (representatives from provider, administration staff and IT) to gather feedback.

- Provide “feedback buttons” on each website page for immediate usability information.
- Continue tracking patients’ office calls to determine if there is a decline over time; a drop in calls would provide “proof point” of the anticipated benefit to clinic staff of reduced phone calls.

Jim Meyers, DrPH has been a patient portal coach for many years and has focused his work primarily with safety net organizations. You can reach him at [jimmeyersdrph@gmail.com](mailto:jimmeyersdrph@gmail.com).