

A photograph of three healthcare professionals (two men and one woman) sitting around a conference table, looking at a laptop. The image is partially covered by a dark blue diagonal overlay. A thin yellow line runs from the top right corner towards the laptop.

2022 Digital Marketing State of Technology Survey Healthcare

LeapPoint 




 Adobe



Table Of Contents

Summary of Results	3
5 Steps to Digital-First, Personalized Healthcare	4
Step 1: The Consumerization of Healthcare Requires Operations-Focused Digital Transformation	5
Step 2: Select a Tech Partner with an Rx for Self Sufficiency	7
Step 3: Create One Marketing System of Record for Improved Employee Collaboration and Performance	9
Step 4: Connect Data and Cross-Industry Expertise	11
Step 5: Align Corporate Strategy, Digital Marketing and Tech Investment Priorities	13
Industry Expert Point of View	15



Summary of Results

The **Adobe+LeapPoint 2022 State of Digital Marketing Technology Survey** asked Marketing, Operations and IT managers to share their current digital marketing and customer experience challenges and what they need from technology providers and partners to move their digital marketing goals forward.

Across the board, respondents said they want technology providers to listen more to their challenges and provide strategic guidance. Given the complexity and breadth of today's healthcare environments, more technology is not always better.

Instead, companies are looking for a Connected Work approach that intentionally combines strategy, processes, people, data, analytics, and the right new technology investments to build a bridge everyone in the organization can traverse together.

For healthcare organizations, making the shift from a traditionally episodic healthcare model to one of continuous digital customer engagement is difficult, even for the most committed and strategic customer-centric companies.

Consumers expect the same self-service, personalized and proactive digital experience from their healthcare providers as they do from personal banking, travel, and retail brands including:

- personalized online portals that make it easy to view health data, test results, physician instructions, upcoming appointments, insurance, and billing information all in one place;
- the ability to easily send a message from anywhere, at any time, and receive an immediate response instead of calling and waiting on hold;
- access to their medical team when it is convenient for them, sometimes from the comfort of their own home via telehealth options, especially in rural communities where access to doctors is limited;
- carefully curated and personalized information at each new step of their unique healthcare journey so they know providers are paying attention to the "person" in personalization.



5 Steps to Digital-First, Personalized Healthcare

The following **5 Steps to Digital-First, Personalized Healthcare** provide solutions to the top challenges shared by managers in our survey, as well as key lessons learned from successful digital marketing transformations at Adobe and LeapPoint healthcare customers across providers, payors, life sciences and pharmacies.



DIGITAL-FIRST, PERSONALIZED HEALTHCARE

1 The Consumerization of Healthcare Requires Operations-Focused Digital Transformation

The rapidly changing healthcare competitive landscape combined with expectations for healthcare to feel as frictionless and simple as a retail buying experience, makes improving customer journeys and digital experiences a top marketing growth opportunity.

For decades, healthcare has lived on an “experiential island” where face-to-face sick management was the prevailing model, patient interactions were cyclical, and digital was a nice to have, certainly not business critical. The pandemic disrupted all of that and thrust patients into a digital-first frame of mind, with no turning back.

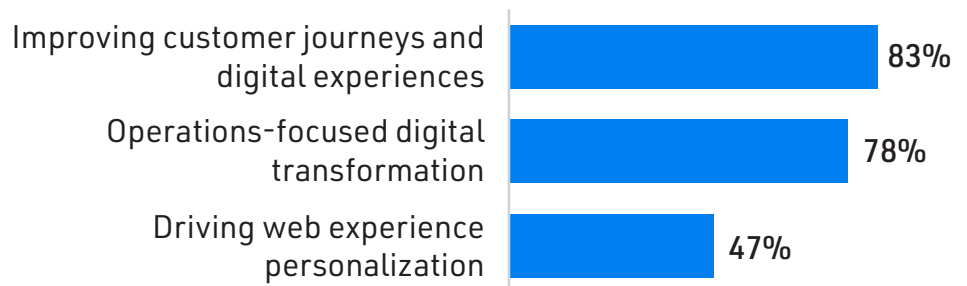
The good news for legacy healthcare companies is they hold a position of trust and history with customers, versus the new digital disrupters who are still establishing their credibility. But that trust will only last so long if receiving healthcare services is

inconvenient, confusing, or inaccessible from a device while sitting at the kitchen table.

Our survey found that although healthcare organizations acknowledge improving personalized customer journeys and digital experiences is a top goal, a lack of integration across their tech stack is a barrier. The issue is compounded further as they struggle to find the talent within to initiate and execute the necessary operations-focused digital transformation. These skills are required to address other obstacles standing in the way such as reacting to customer preferences for communication in order to build trust and preparing for a future without 3rd party cookies. As a result, they are increasingly looking outside of their organizations to help them see desired outcomes.

A strong correlation exists between improving customer journeys/ personalization and the need for operations-focused digital transformation to achieve that outcome.

Biggest non-sales / Marketing growth opportunities



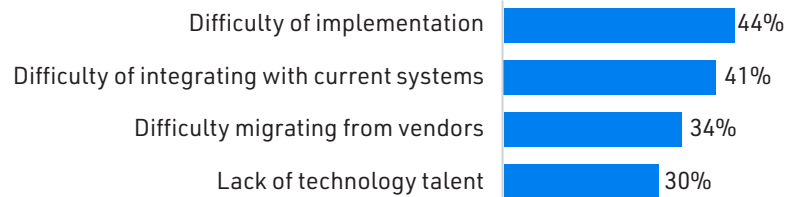


While all are considered at least somewhat challenging, marketing departments are particularly concerned with a lack of integration across their technology landscape.

Difficulty in Addressing Top Marketing Issues

- 1 Lack of integration across multiple point solutions
- 2 Overlaying customer preferences for communication on top of first party data to build trust
- 3 Adapating to a cookie-less ecosystem with the expectation that cookies are to be eliminated by 2023

Barriers to Greater Tech Investment



Our survey found that although healthcare organizations acknowledge improving personalized customer journeys and digital experiences is a top goal, a lack of integration across their tech stack is a barrier.





DIGITAL-FIRST, PERSONALIZED HEALTHCARE

2 Select a Tech Partner with an Rx for Self Sufficiency

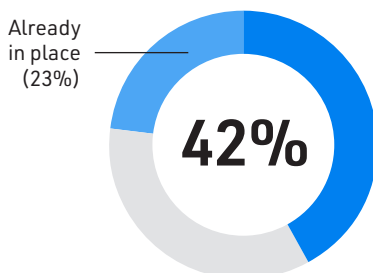
While most healthcare providers are reliant on technology integration and implementation partners to initiate strategic, operations-focused digital transformation, the long-term goal should be self-sufficiency.

To that end, our survey found that for healthcare organizations, any new technology investment must be compatible with current solutions, easy to deploy and implement with minimal post-deployment ongoing management required.

The more a tech partner can do to “teach a company to fish”, the quicker the healthcare provider can reduce expenses and begin creating improved experiences for employees, members, and patients on its own.

Interest in Working with Tech Partners

% Very Interested



65% of survey respondents are planning to engage with tech partners, or already have them in place to help them map and achieve their vision of better more personalized customer journeys.

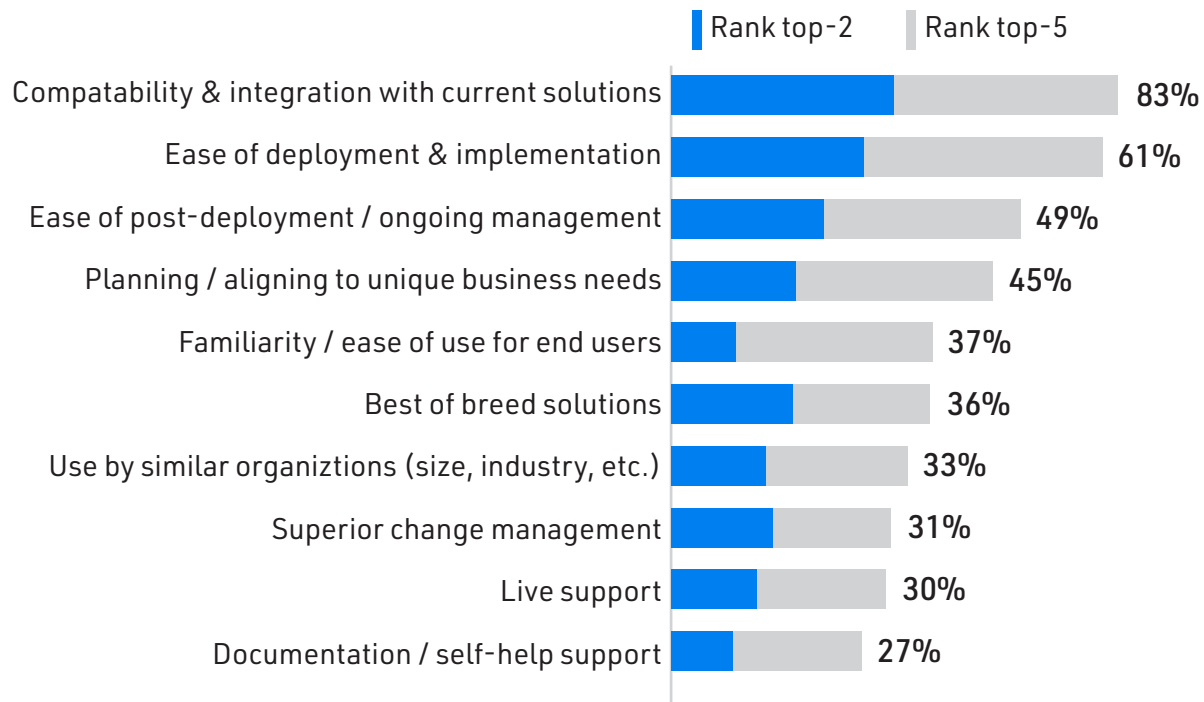
The best technology providers and partners focus on:

- Breaking down internal silos and drive improved employee experience (EX) so teams can do their work developing a better customer experience (CX)
- Creating one unified operational system of record to foster greater visibility and better decision making across the enterprise
- Aligning creative team requests with the phase of the patient journey to drive a better and more consistent experience throughout the continuum of care
- Validating data policies and improve the capture of first-party data to deliver truly personalized experiences across channels and organization brands
- Enabling delivery of creative content to market faster and more efficiently, with strategic accommodations for operational shifts, and remote work
- Swiftly and consistently support brand, regulatory and brand requirements



The top three tech provider criteria speak to the expectation that solutions play nice together across platforms and do not put undue stress on the organization to implement and maintain.

Most Important Tech Provider Evaluation Metrics



Given the complexity and breadth of today's tech environments, any solution without sufficient compatibility or integration will be abandoned. Deployment & integration are seen as significant barriers, so easing this process as much as possible is a significant benefit.

These align very well with the top barriers to additional tech investment cited earlier.

Beyond ongoing management, several second-tier factors are more perception-based than technology solution functionality: aligning with business needs, established best of breed, used by similar orgs, and familiarity for example.





DIGITAL-FIRST, PERSONALIZED HEALTHCARE

3 Create One Marketing System of Record for Improved Employee Collaboration and Performance

It is easy for healthcare organizations to look disproportionately at the customer side of the equation and underestimate how important workload visibility, transparency, collaboration, and quality is on employee satisfaction and productivity.

As digital marketing becomes more personalized and complex, healthcare organizations need to change how they work to become scalable, sustainable, and meet increased marketing and communications demands with the teams they have in place today.

Managers in our survey said investing in project and work management solutions to manage marketing efforts and improve productivity is the number one technology-driven priority “critical to business success.”

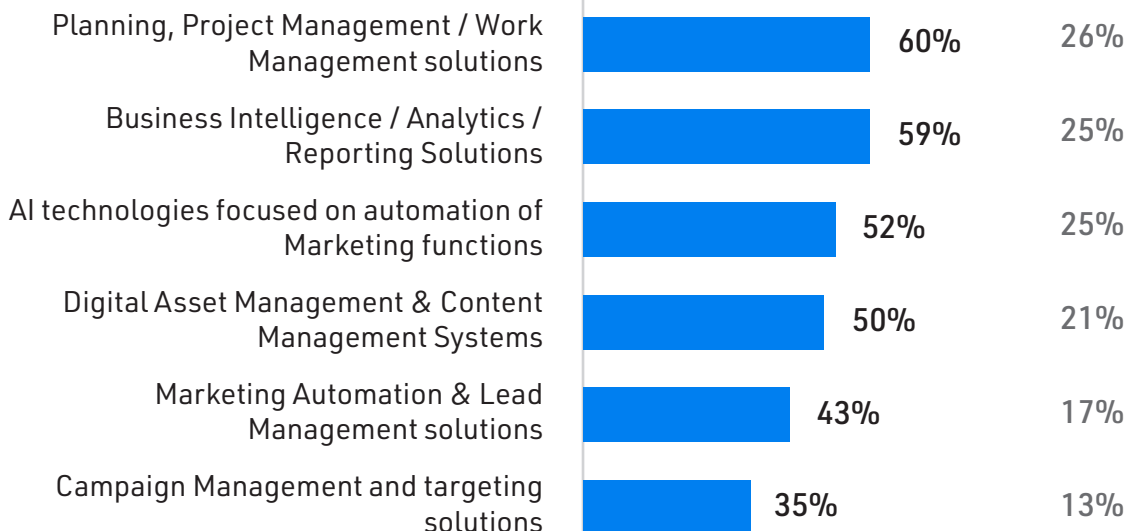
Companies are looking to ensure employees are equipped and the organization has all necessary competitive advantages without falling behind.

The ability to manage marketing efforts is the biggest technology-driven priority just ahead of BI and Analytics. Almost universally across categories, 75%+ have yet to make a significant investment.

Software critical to future success

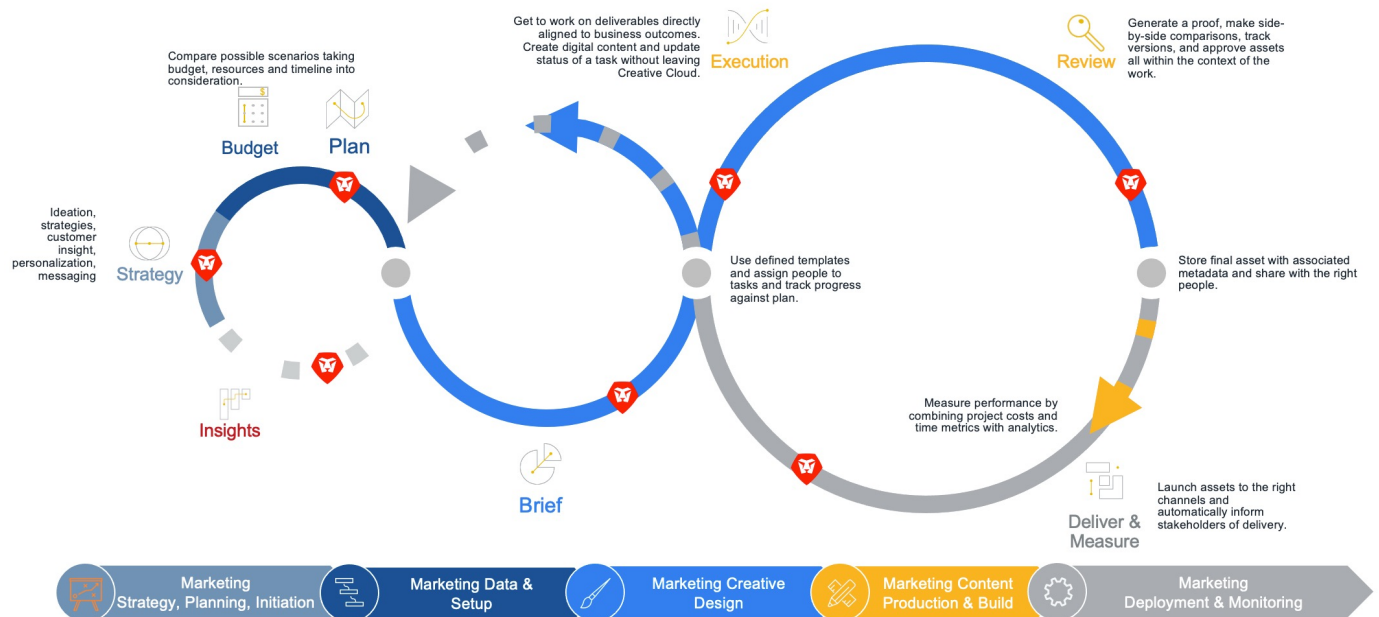
Next 3 years

Made significant investment





A Digital Marketing Operational System of Record is the Engine for Personalized Digital Marketing Content Creation, Deployment and Monitoring



"Digital doesn't mean easier. It's not getting simpler. There are more channels emerging. There are more expectations from customers. You have to be quicker, smoother, more seamless and integrated."

Matt Harker
VP of Global Marketing Strategy and Transformation,
Walgreens Boots Alliance



DIGITAL-FIRST, PERSONALIZED HEALTHCARE

4

Connect Data and Cross-Industry Expertise

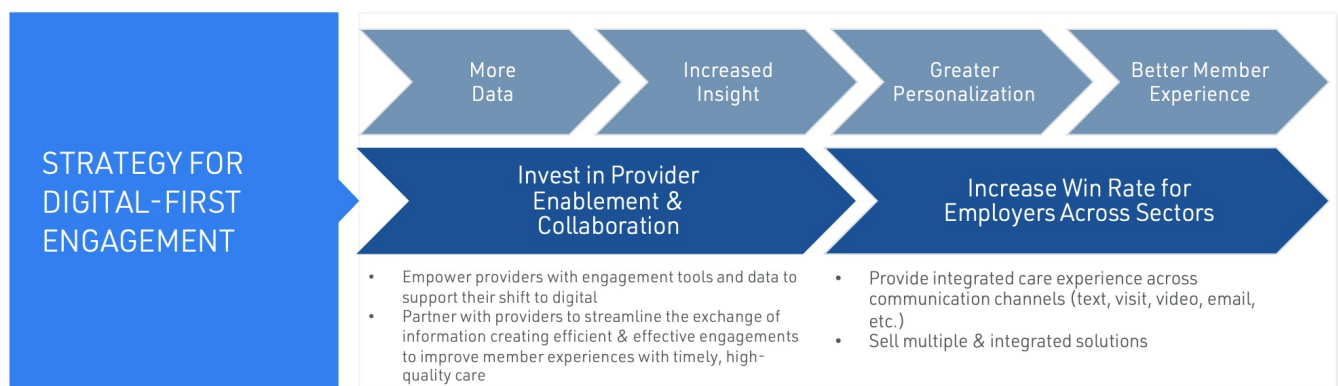
There is a tremendous amount of data available to healthcare organizations waiting to be used in compliant and secure ways to improve patient experiences and outcomes. Unfortunately, that data is often locked away or “owned” by one business unit, never to be seen by another.

A healthcare insurance company, for example, may have multiple internal business units and a customer could conceivably pass through each unit at one time or another during their journey. Yet each time, that customer’s interactions and history with the organization is unknown from one internal group to the next. A customer may conclude that if they must start over each time, why not try starting new with a different healthcare organization?

Investing the time to connect the data and systems you already have in place will provide more opportunities for personalized interactions with the customers you want to keep, and the future customers you want to earn.

And as we’ve already mentioned, consumers expect their healthcare digital experience to rival their personal banking, travel, and retail brand experience. It makes sense, then, to bring on digital marketing expertise from other vertical markets for fresh perspectives on how to successfully connect data for more integrated and meaningful interactions with your patients customers.

Translating Data to Insights For a More Personalized Patient/Member Experience





DIGITAL-FIRST, PERSONALIZED HEALTHCARE

5 Align Corporate Strategy, Digital Marketing and Tech Investment Priorities

Healthcare organizations need to define their shared values both internally and externally to create, cultivate and communicate a differentiated brand identity. While this is important in every industry, it is critical in healthcare.

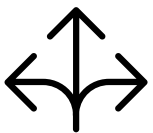
The consumerization of healthcare necessitates that every customer interaction reflects a brand's mission, vision, and goals. A Connected Work approach to Digital Marketing built and executed around Corporate Strategy will help create transparency, build more efficient processes, and seamlessly integrate best-in-class

technology to support personalization campaigns and projects that deliver more brand value and meaningful experiences to employees and customers.

A connected, integrated strategy also informs investment priorities across the organization to ensure that as technology decisions are made all teams consider the outcomes critical to the business, not just their own department.

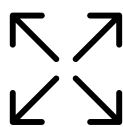
Nearly half of organizations **do not** have a clear integrated technology strategy across the business with many organizations still allowing different parts of the business to make potentially misaligned investment. Combine this with growing technology budgets and the potential for proliferating disconnected systems is high.

Formal Strategy for Tech Investment



51%

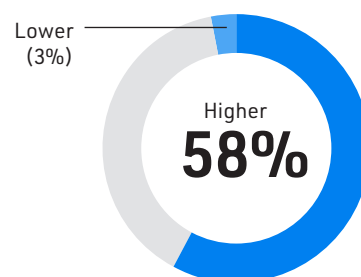
clear integrated strategy across different parts of the business



44%

different parts of the business invest according to their own strategies

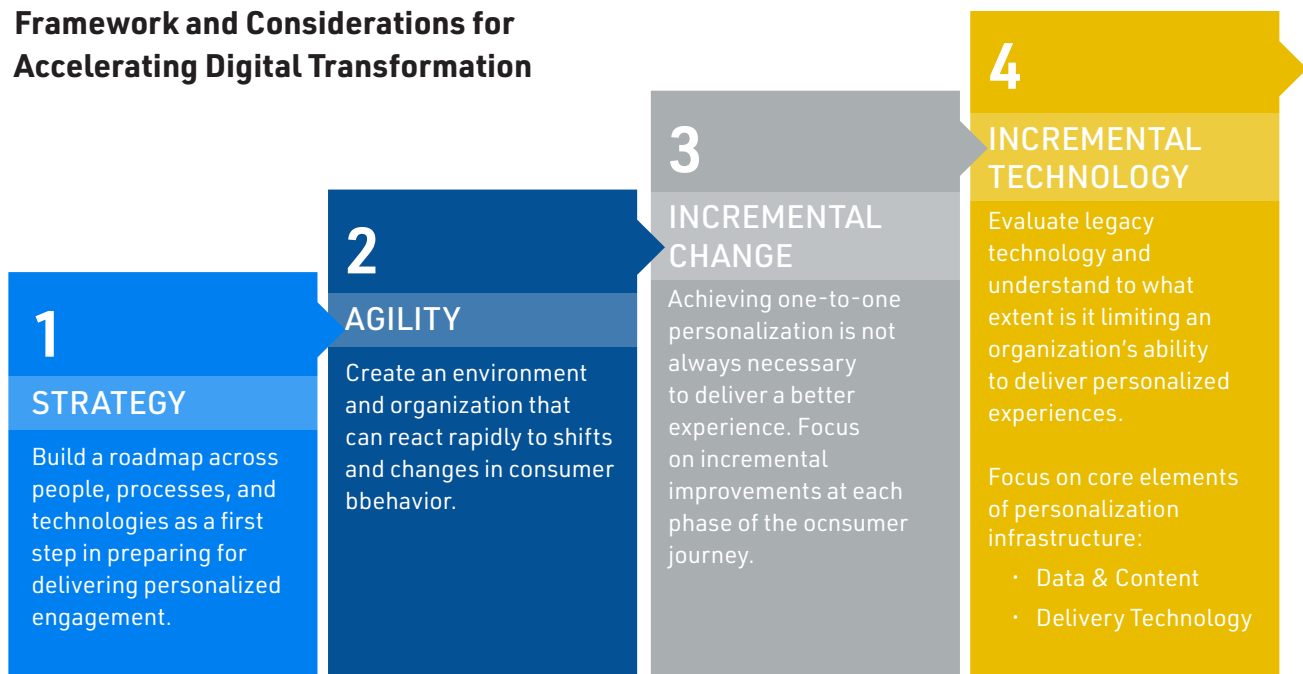
2022 Tech Budget vs. Pre-COVID



Confidence in increased tech budgets & adoption is buoyed by strong optimism for overall growth in the next 12 months (97%)



Framework and Considerations for Accelerating Digital Transformation



The consumerization of healthcare necessitates that every customer interaction reflects a brand's mission, vision, and goals.



Industry Expert Point of View

"As high-deductible healthcare plans and out-of-pocket expenses motivate customers to shop around for the best experience and value for their dollar, Adobe is focused on helping organizations modernize their digital healthcare delivery with privacy and security top of mind, to create new, personalized service offerings that engage patients, members, providers, and healthcare professionals with experiences that really matter."

Tom Swanson,
Head of Industry Strategy and Marketing,
Adobe Health and Life Sciences

"By managing marketing efforts through one Digital Marketing Operational System of Record, healthcare organizations can improve creative workflow processes, provide visibility into resource capacity, support capacity planning and provide qualitative data about customer engagement where none existed before. At LeapPoint, we are working with healthcare organizations to Connect Work in exciting new ways and provide a path to self sufficiency through technologies that make digital marketing more personalized, collaborative, efficient and meaningful for customers and employees."

Jen Krempa,
Global Head of Delivery, LeapPoint

Adobe powers digital experiences for:

7 of the top 10

HEALTHCARE PROVIDERS

8 of the top 10

HEALTHCARE PAYERS

9 of the top 10

PHARMACEUTICAL COMPANIES

– delivering experiences with agility and at scale.





About Adobe

Adobe Workfront is enterprise work management software that connects work to strategy and drives better collaboration to deliver measurable business outcomes. It integrates people, data, processes, and technology across an organization, so you can manage the entire lifecycle of projects from start to finish. By optimizing and centralizing digital projects, cross-functional teams can connect, collaborate, and execute from anywhere to help them do their best work.

To discover more about the tools you need to succeed at every step of the customer journey, visit www.adobe.com.



About LeapPoint

LeapPoint Consulting is changing the way companies connect work, technology, and talent to solve big business challenges and drive successful outcomes. Established by Big 4 alumni who sought more flexibility and agility in meeting clients' most critical business needs, LeapPoint is committed to making life and experiences fundamentally better for employees, customers and those they serve.

As the go-to Adobe and Adobe Workfront partner in financial services, healthcare, travel & hospitality, retail, and more, LeapPoint's break-through Connected Work[®] services are the essential framework for driving experiences that deliver business outcomes that matter.

To learn more about LeapPoint and our promise of Connected Work[®] for powerful experiences, visit www.leappoint.com or email info@leappoint.com.

