



# RELATIONSHIP MARKETING:

How To Grow Your Organization - One Person At A Time

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## WORK EXPERIENCE



Senior Associate, Marketing Consultation, *OPEN MINDS*  
July 2017 – Present



Marketing Manager – Global Manufacturer & Healthcare  
Technology Company  
July 2015 – July 2017



Marketing Director – Camelot Care Centers / Providence  
Human Services  
April 2009 – July 2015

## EDUCATION



Master of Science | Communication & Marketing  
Franklin University, Columbus OH | 2017

Bachelor of Science | Visual Communication & Graphic Design  
Lambuth University, Jackson, TN | 2003

# AGENDA



Basics Of Marketing

Low Cost Marketing Options

Case Study Example

Wrap Up With Q & A

# TRADITIONAL MARKETING MIX

## The 4 P's Of Marketing

### **PRODUCT**

A product can be either a tangible good or an intangible service that fulfills a need or want of consumers.

### **PRICE**

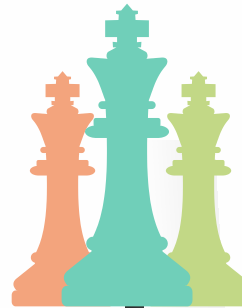
Price is the final amount your customer buys your product and will impact profit margins, supply, demand and marketing strategy.

### **PLACE**

In marketing, the place where your customer is exposed to (and hopefully purchases) your product is the foundation for any successful marketing mix.

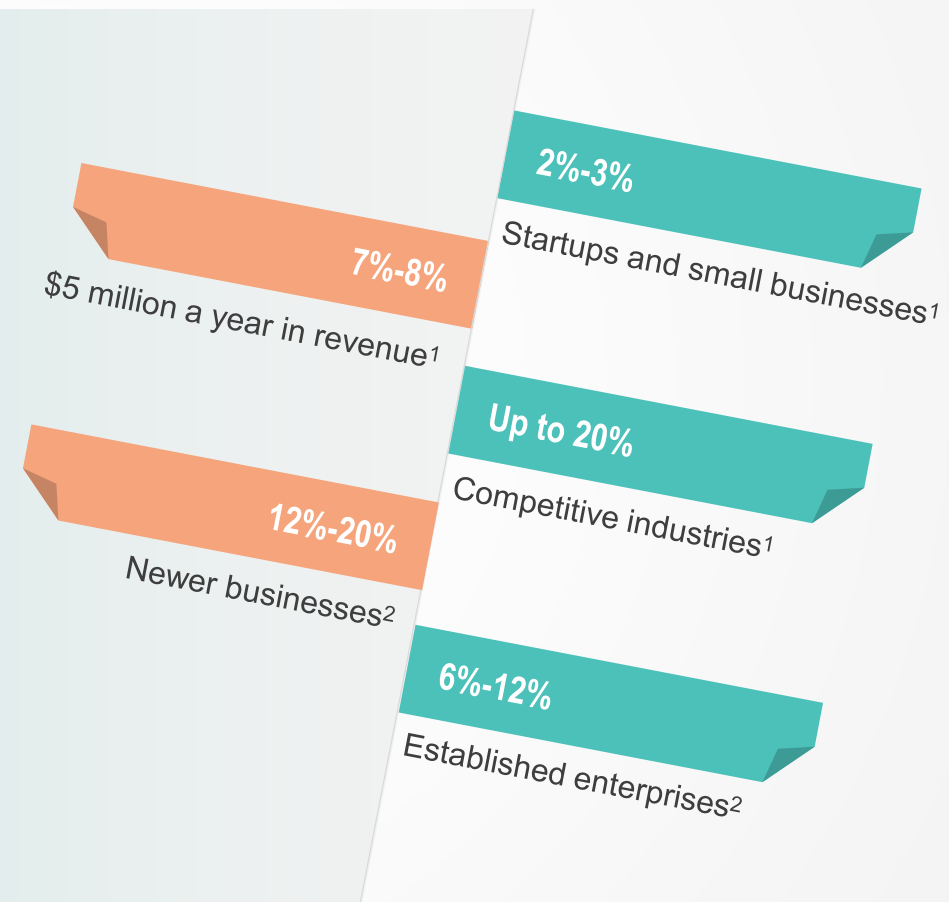
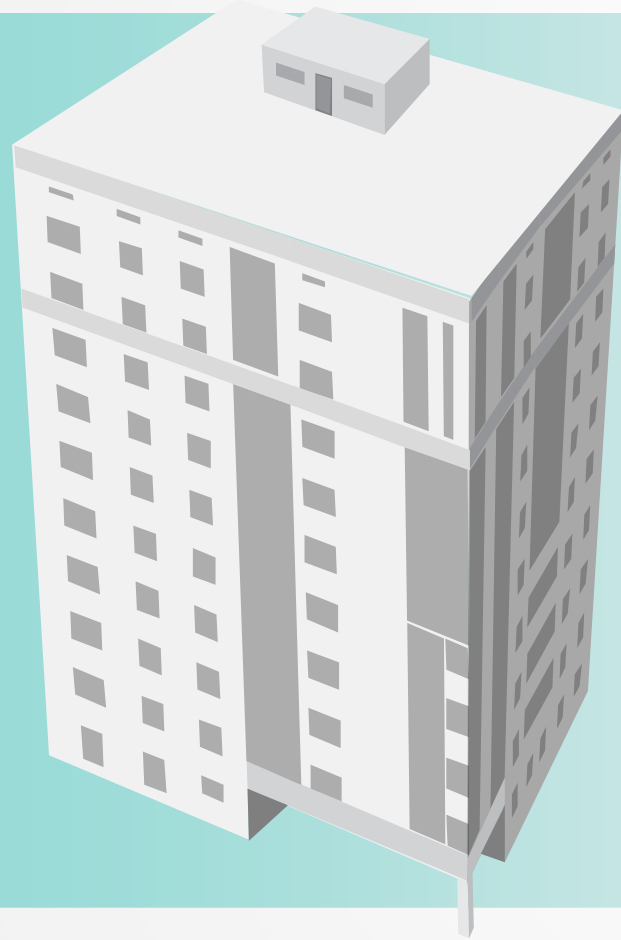
### **PROMOTION**

Promotion includes elements like: advertising, public relations, social media marketing, email marketing, search engine marketing, video marketing and more.



# MARKETING SPENDING

Typically, Businesses Spend 1%-20% Of Revenue On Marketing

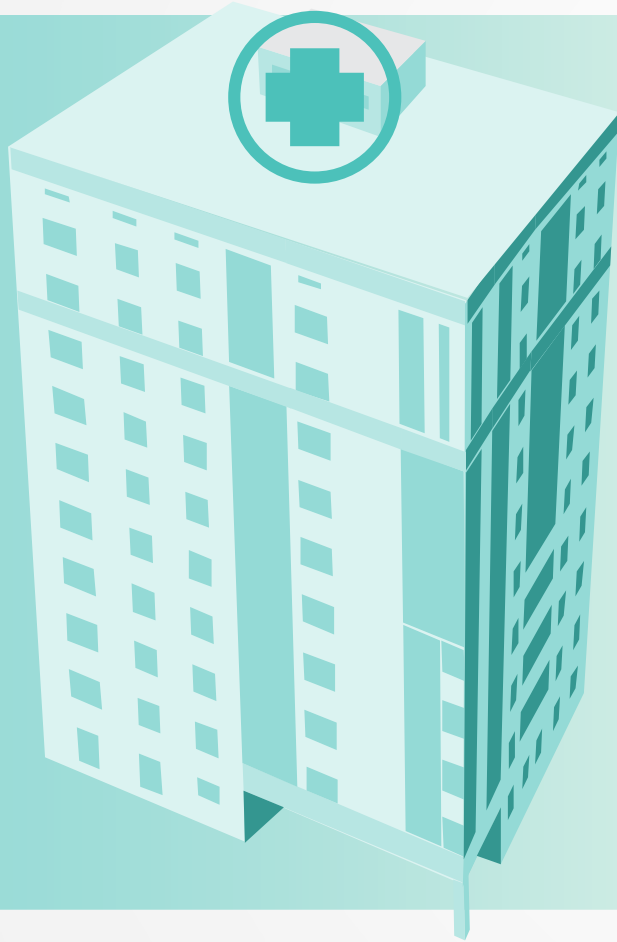


1. <http://smallbusiness.chron.com/percentage-gross-revenue-should-used-marketing-advertising-55928.html>

2. <https://www.forbes.com/sites/steveolenski/2015/12/21/a-practical-guide-to-determining-your-perfect-marketing-budget/#4bd0ed1f360d>

# HEALTHCARE MARKETING SPENDING

How Much Should You Spend?



1. <https://www.kunocreative.com/blog/2016-healthcare-marketing-budget>



# ORGANIC GROWTH WITHOUT MARKETING

Lots Of Behavioral Health Organizations  
Have Grown Without A Formal Marketing  
Strategy

- Applied for new services delivery contracts
- Developed a new service line
- More people are enrolled in a health plan because of the ACA
- Mental health / physical health parity laws





# BEHAVIORAL HEALTH SERVICES

Service Needs - Mental Health Spending - Medicare Reimbursement

41M

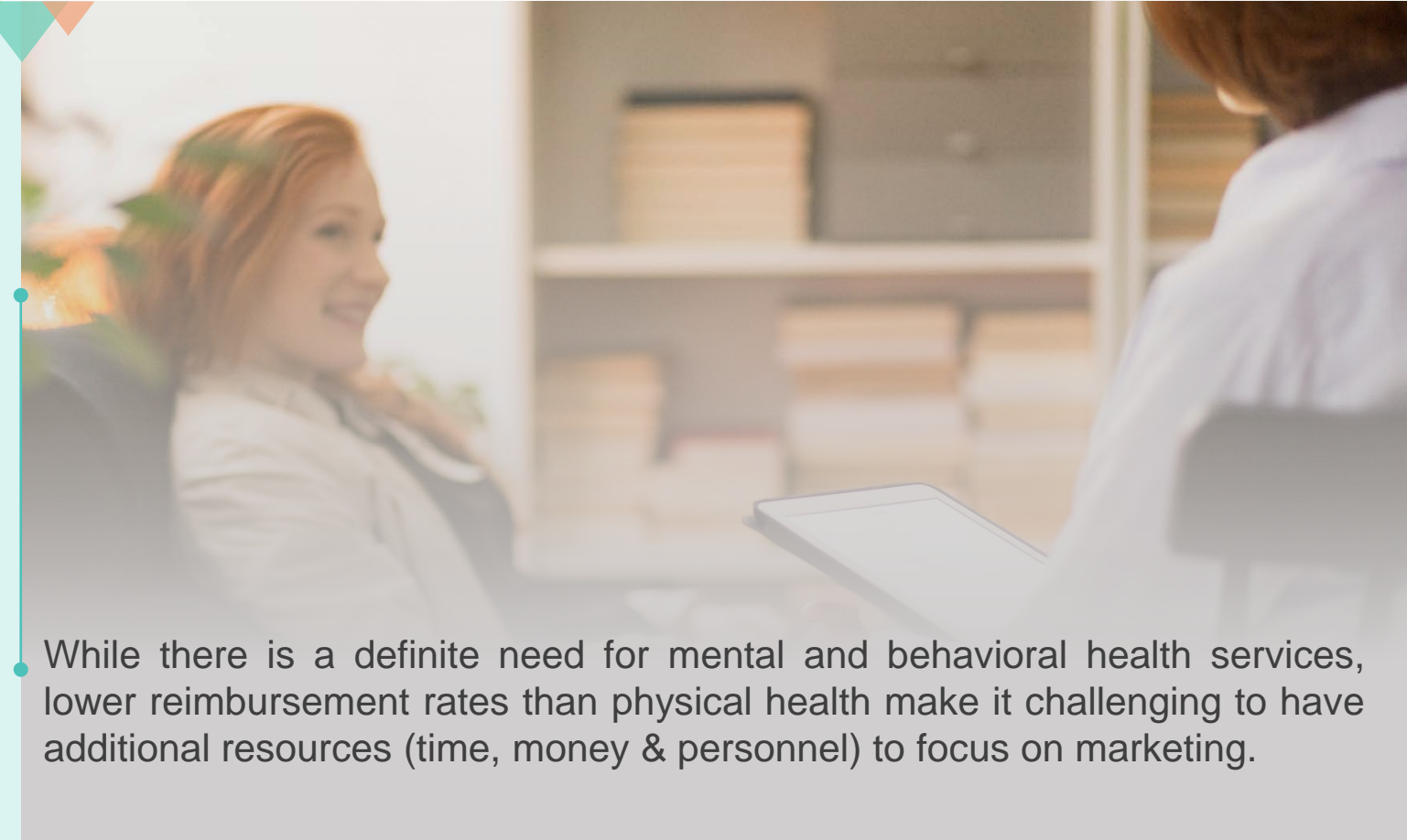
Americans Experience A Mental Health Illness Each Year

\$221

Billion In Mental Health Spending in 2014

75%

Medicare Reimburses Clinical Social Workers



While there is a definite need for mental and behavioral health services, lower reimbursement rates than physical health make it challenging to have additional resources (time, money & personnel) to focus on marketing.



# HOW TO MARKET IN THIS ENVIRONMENT



# MARKETING

## Revenue

Low reimbursement rates and small margins mean that most organizations operate at barely breakeven



## Investment

However, investment in marketing is needed to grow

# OBJECTIVES

OBJECTIVE 1



Identify ways to implement relational marketing strategies

OBJECTIVE 2



Define opportunities to improve interpersonal marketing skills within the organization

OBJECTIVE 3



Recommend relational marketing solutions to improve service delivery & gain brand awareness

# AUDIENCE QUESTIONS

Do you have a marketing person at your organization?

1



Who has a marketing or business development team?

2



Do you have a marketing budget?

3



If you don't have a marketing department or budget, you might be wondering where to even start.



# DEVELOPING A MARKETING STRATEGY

Unique Low-cost Marketing Opportunities & How To Implement

## Internal Marketing



Address Your Internal **Culture**,  
Including Mission, Vision & Values

## External Marketing



Get Involved In Your  
**Community**

## Both Kinds Of Marketing



Your Team's **Customer Service**  
Is Your Largest Marketing Asset



# AUDIENCE QUESTIONS

How Do You Define Organizational Culture?

# I CULTURE

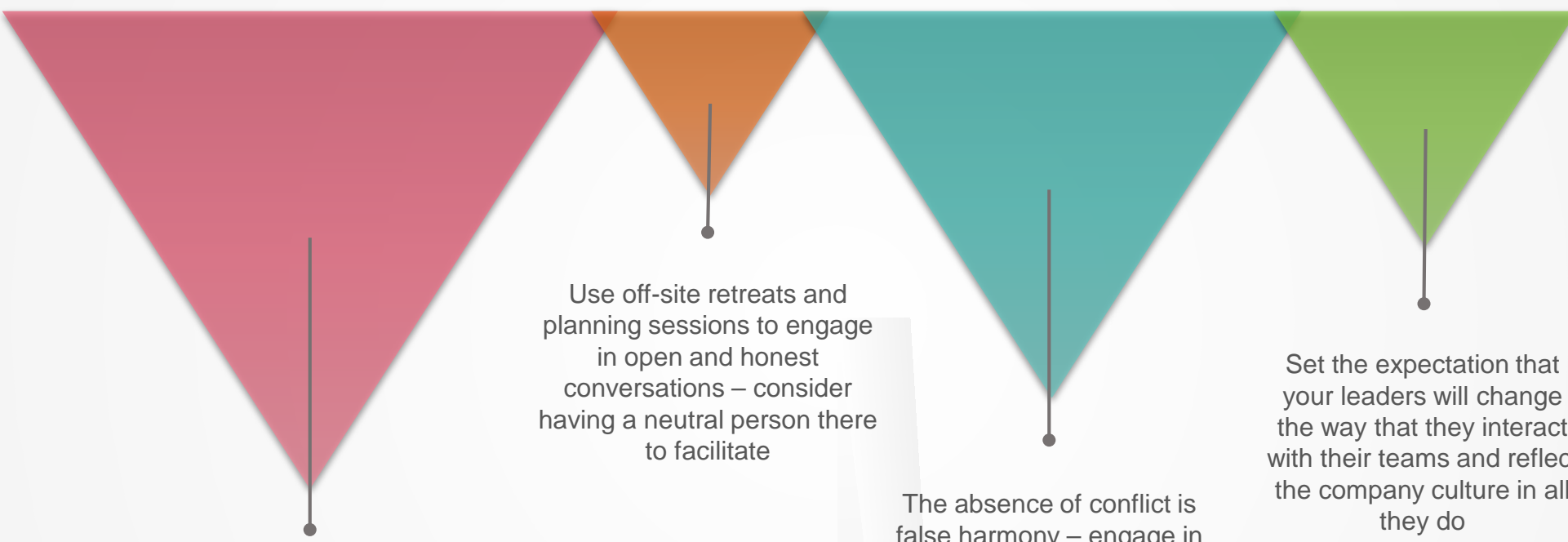
- When I say “organizational culture,” what do you think of?
- Can you list some companies that are known for a good/fun working environment?
- How does your own culture compare?

# WHY CULTURE MATTERS



# CULTURE CHANGES

## Where To Start



Make sure all of your leadership team is involved in changing your culture and committed to putting in the transformative effort

Use off-site retreats and planning sessions to engage in open and honest conversations – consider having a neutral person there to facilitate

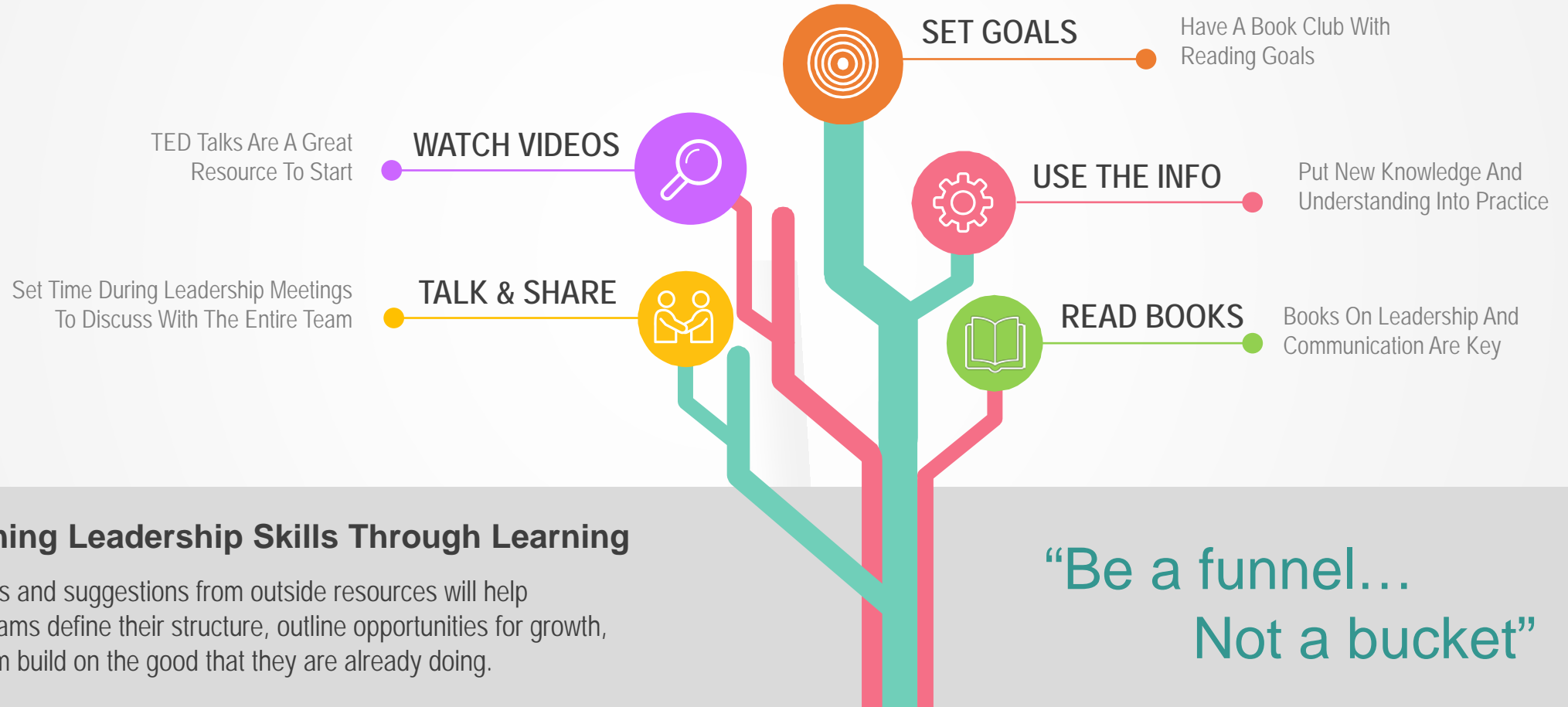
The absence of conflict is false harmony – engage in difficult conversations and healthy confrontation in your organization

Set the expectation that your leaders will change the way that they interact with their teams and reflect the company culture in all they do



# BE A LEARNING ORGANIZATION

Encourage Reading Books, Articles & Watching Videos On Leadership



## Strengthening Leadership Skills Through Learning

The strategies and suggestions from outside resources will help leadership teams define their structure, outline opportunities for growth, and help them build on the good that they are already doing.

“Be a funnel...  
Not a bucket”

# CULTIVATE LEADERS

Empower & Educate Your Employees To Be Able To Make Critical Decisions

## MANAGER

Do Things Right  
Work Focused  
Count Value  
Have Staff  
Transactional Process



## LEADER

Do The Right Thing  
People Focused  
Create Value  
Have Followers  
Transformational Process

# INTERNAL MARKETING STRATEGIES

Your Team Matters – Let Them Know That



*Change your language*



*Encourage collaboration & fun*



*Celebrate achievements*



*Recognize birthdays & work anniversaries*



*Empower your teams to offer ideas*



# FINAL THOUGHTS ON CULTURE

Live Out Your Mission, Vision, And Values

## YOUR CULTURE

Each organizations' culture will be a unique environment. Your mission, vision, and values will be distinctive to the kind of work you do and the populations you serve. No matter what the end result is – live it out every day!

- 1 Increases loyalty at your workplace
- 2 A strong, positive company culture attracts better talent
- 3 You have brand ambassadors, not people collecting a paycheck
- 4 A healthy culture is a key to retaining top talent
- 5 Culture is becoming a more popular consideration for jobseekers
- 6 Corporate culture also adds to your brand identity



# AUDIENCE QUESTIONS

What Is Community Involvement To You?



# COMMUNITY OUTREACH

- How many events does your organization participate in each calendar year?
- What types of community involvement does your organization partake in?
- How do you communicate the good work you're doing?



# COMMUNITY OUTREACH PROGRAMS

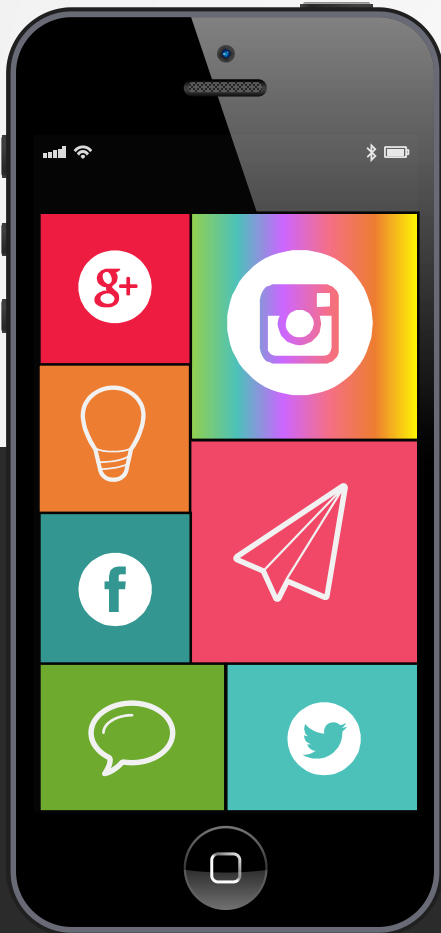
- Volunteer at community events
- Take part in 5K walks, children's festivals
- Have a booth at small and local events to talk about your services
- Ask team members to participate in a community services project
  - Give blood in honor of a cause that makes sense for your organization
  - Build a home in a neighborhood that needs affordable housing
  - Plant a community garden that nourishes local families
- Attend conferences to network



**Kid's Fest • Nashville  
2012**

# DIGITAL COMMUNICATION STRATEGY

Email Marketing - Social Media - Online Presence



## Email Marketing

Create an email marketing campaign list to use as a regularly-sent newsletter. Develop informational content around different audiences – social workers/ policy makers/ consumers. Create a content calendar and email consistently.



## Social Media

While you're at all of these events, take lots of pictures and videos to post to your social media channels. If you have any concerns regarding HIPAA, have your legal department craft a release – or don't post about clients.



## Online Presence

Your online presence reaches beyond your website and your social media channels. What do your online reviews reveal? Google, Facebook, Yelp, Glassdoor, Indeed all tell the world about your organization. Have you read it?



# EMAIL MARKETING

Know Your Audience – Provide Useful Content

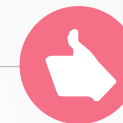
Build your email list at events, your website, and your social media channels



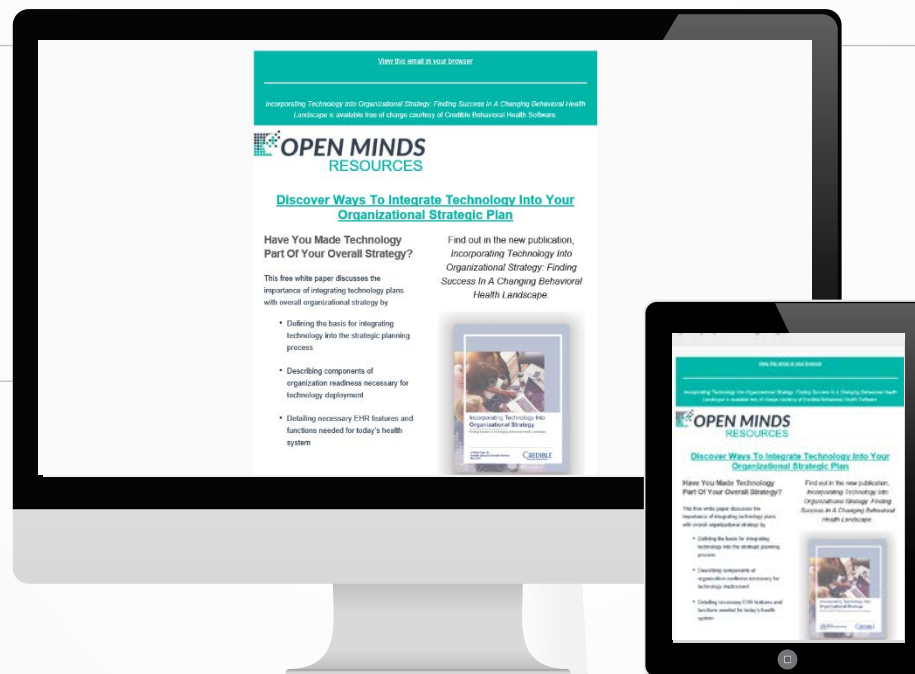
Solve a problem for your audience, entertain them, or give them useful information



Allow your audience to change email preferences easily



Make sure your content is mobile-ready and can be accessed across platforms



# SOCIAL MEDIA ENGAGEMENT

- The internet has **3.17 billion users**
- There are **2.3 billion active** social media users
- Internet users have an average of **5.54 social media accounts**
- Social media users have risen by **176 million** in the last year
- 1 million new active mobile social users are added every day - that's **12 each second**
- Facebook Messenger and WhatsApp handle **60 billion messages a day**

# SOCIAL MEDIA CHANNELS

Statistics - Audiences - Demographics

## Twitter

Evenly split between male and female, urban/suburban/rural, more education

## Facebook

Skews female, heavy usage in with 18-49 year olds, some education



## Instagram

Skews very much toward females in urban settings, more usage in younger demographics

## LinkedIn

More men than women use the site, urban population, 50% hold a college degree

You don't have to do everything! However, whatever you do, do it consistently with entertaining or informative content. Different channels reach different audiences. Define what is the right medium for the people that you are trying to connect with.

# YOUR ONLINE PRESENCE MATTERS

Why Focus On Online Marketing With Behavioral Health Services?



The majority of consumers now get their health information online

Social media and websites are now the primary driver in building 'reputation' for provider organizations

Referral sources use the internet & your website as a reference for making client referrals

Donors, especially young donors, refer to websites when seeking detailed information about charitable organizations

Creating and managing an online presence – an integrated website & social media presence - is key to maintaining a positive brand image

An integrated online communication strategy is the most cost-effective way to communicate with external stakeholders

# PUBLIC RELATIONS

It Can Be Complicated - Or Cost You Money

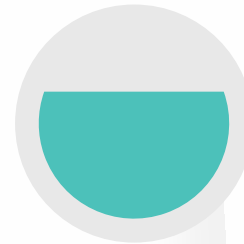
## Pick A Strong Writer

Knowing how to effectively communicate is the first step. News organizations will not pick up a poorly written story.



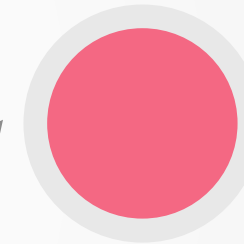
## Have Something To Talk About

All those fun events you've been helping out at, write about them!



## Strategic Distribution

Larger news markets typically have enough stories to report. This strategy works better in smaller news markets.



When all else fails, if the story is big enough and warrants spending money, you can pay a press release distribution site to send out your content.



# AUDIENCE QUESTIONS

What Does Customer Service Mean To You?

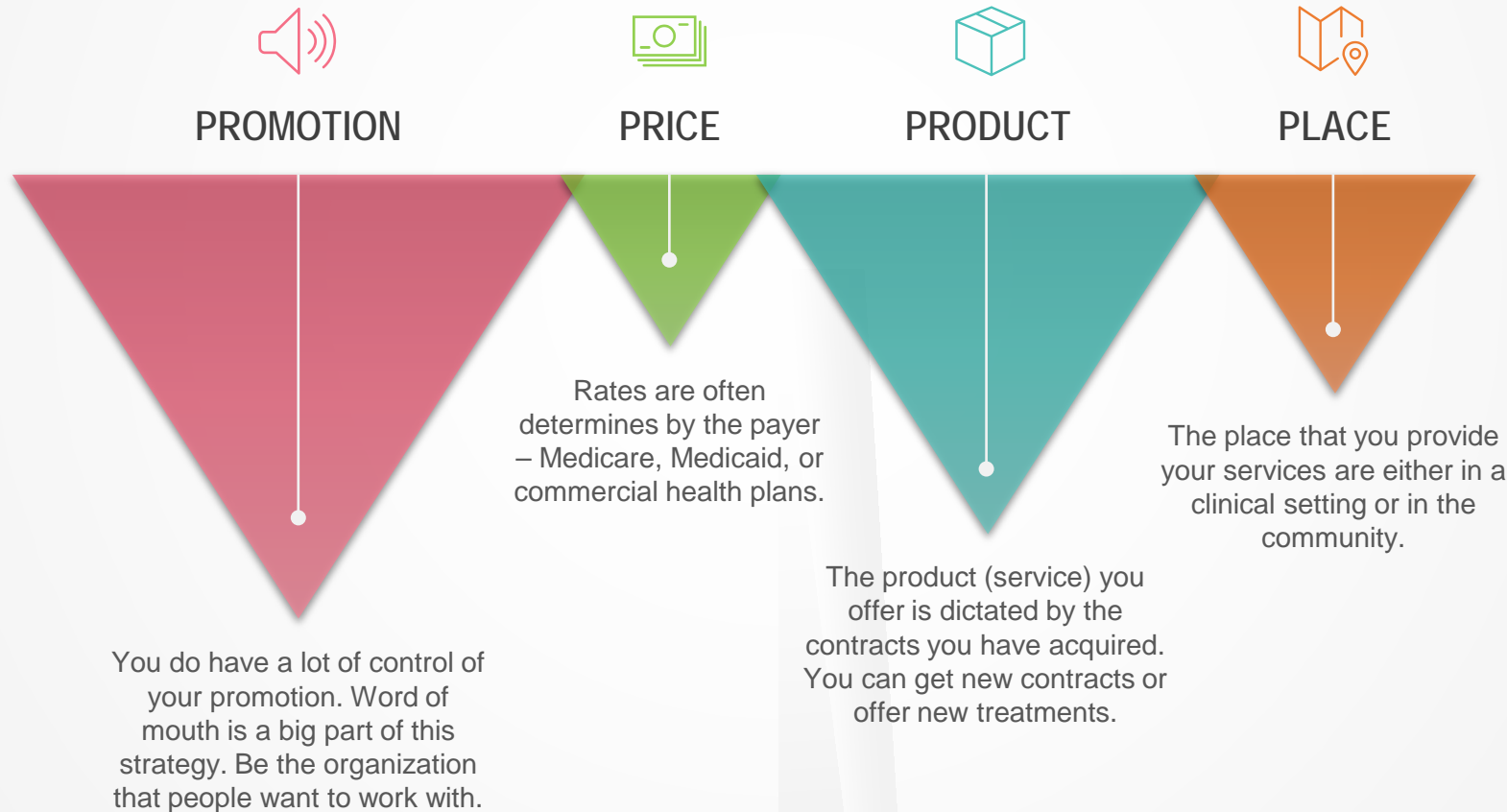


# CUSTOMER SERVICE

- Was there a time when you had fantastic customer service with a company?
- How many times have you had a poor customer service experience?
- Have either of those situations affected how you spend your money?

# THE 4 Ps REVISITED

How Customer Service Affects Your Marketing Strategy





# CUSTOMER SERVICE DATA

Do You Have Happy Or Unhappy “Customers”?

  
**BUILDING**  
RELATIONSHIPS



1

Happy clients will tell others about your services – On average, happy customers tell nine people about their experiences with a company.

2

One person who complains usually means there are a lot more unhappy people who never speak up.

3

Unhappy customers will tell on average sixteen people about a poor customer service experience they had.

4

In a recent survey 40% of respondents—more than double the second place answer—said “better human service” was most important.



9 Potential Referrals



26 Who Are Silent



16 Anti-referrals



Empathy Matters

# GIVING GREAT CUSTOMER SERVICE

One Minute Service Model – Find One That Works With Your Culture





# CUSTOMER SERVICE IN ACTION

- Your team members are your customer service and marketing departments
- Your organization is shaping the “user experience” everytime they come in contact with clients or external stakeholders
- Your reputation and how people perceive you matters – be the provider people want to work with
- Your culture – whether intentionally or unintentionally created – is being represented in your community
- Cultivate an organizational mind-set that it is everyone’s responsibility to be a resource to community partners

All of these actions are enhancing your brand and building a more positive customer experience – and remember that everyone is your customer.



**Greet** • Talk To The Other Person First • Smile • Make Eye Contact • Be Authentic



**Relate** • Build Rapport • Create A Positive Environment • Be Encouraging • Personalize



**Exceed** • Ask Questions • Go The Extra Mile • Under Promise, Over Deliver



**Affirm** • Validate Others • Empathize • Invest In Peers • Inspire Growth



**Thank** • Show Gratitude – Even For Negative Feedback • Perform Random Acts Of Kindness



# MARKETING EXAMPLE

Culture - Community - Customer Service



# CASE STUDY

- Real-life strategy and implementation
- Results-driven decision making
- Changes developed into happier employees and more clients

# THE PLAN FOR CHANGE

Your Organization Should Always Be Changing And Growing





QUOTE BY SIR RICHARD BRANSON

“**Employees** come first. If you take care of your employees, **they will** take care of the clients.”



# INTERNAL CULTURE CHANGES





# EXTERNAL MARKETING STRATEGIES

Plan - Execute - Evaluate - Repeat



*Displayed our culture  
to the community*



*Attended community  
or networking events*



*Wrote press releases  
across the state*



*Planned out an  
editorial calendar*



*Engaged followers on  
social media*

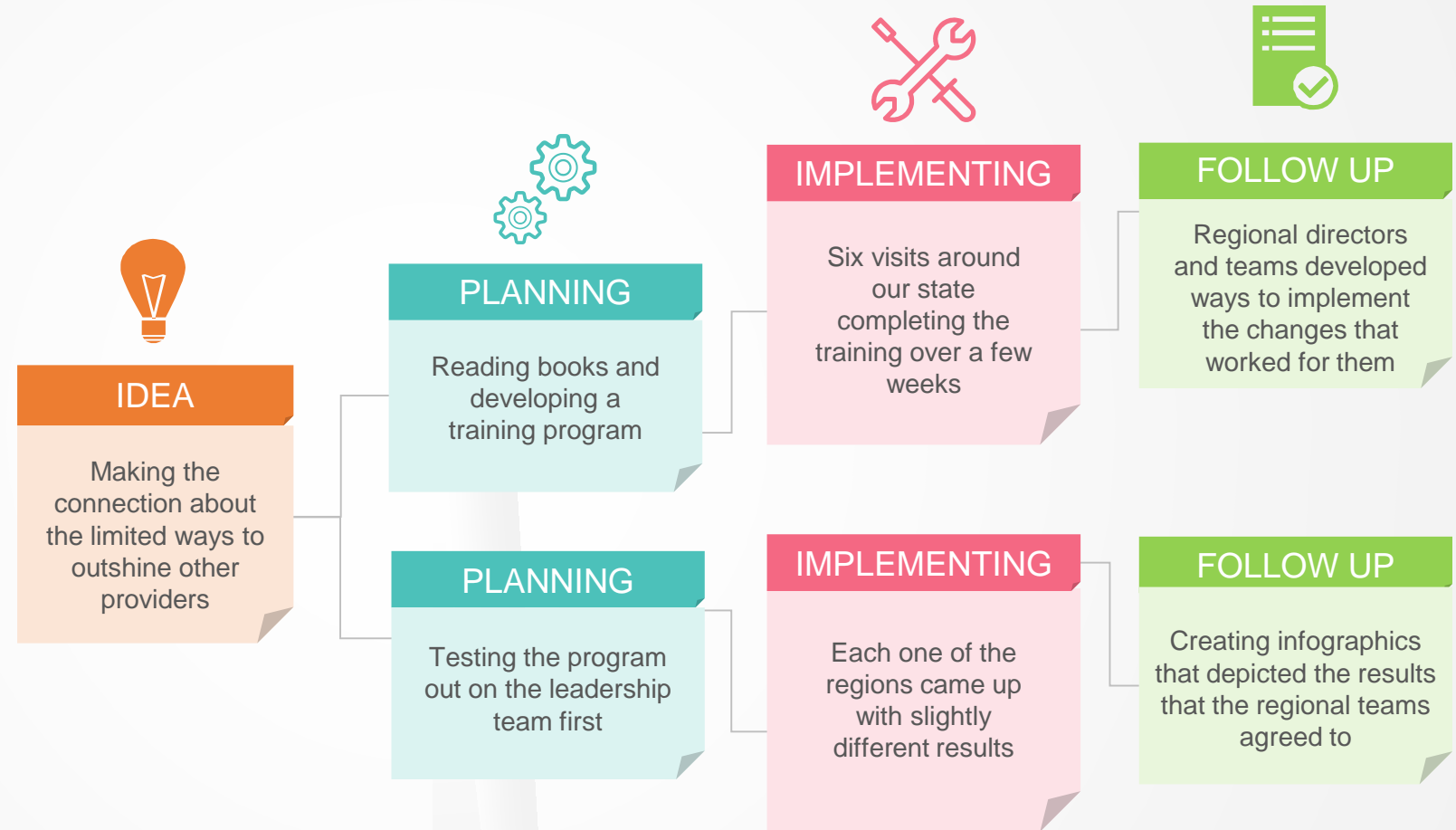


# CUSTOMER SERVICE TRAINING

## OUR PROCESS

Using two books and the basics of a training that a fellow team member already completed, we developed a fun and comprehensive training program over several months. We tested the half-day educational program on the leadership team. This gave us feedback on how they thought their teams would perceive the program and work out any hitches before doing the real training with the regional offices.

After the leadership team approved the customer service program, we went to each of the 6 grand regions and had a fun day with all of the employees.



# OPERATIONAL GROWTH

Office Expansion With More Employees



The organization grew from five regional offices to 17 in a few years



More offices helped minimize travel costs for in-home counselors

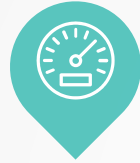


Additional employees were added to every month



# CENSUS GROWTH

Increased Census To Reach More Children & Families



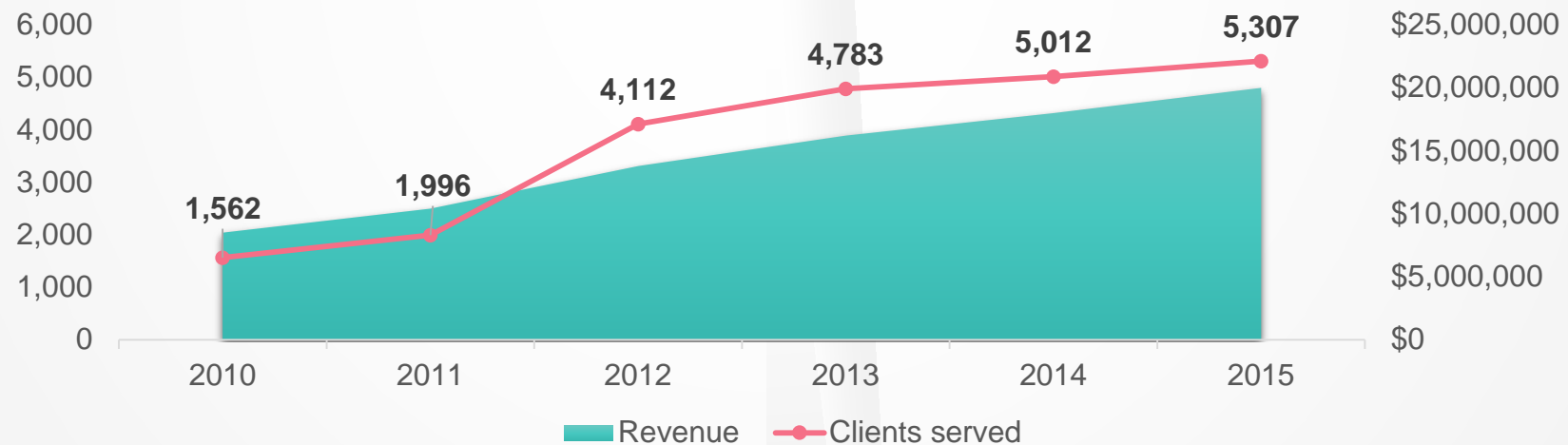
More employees meant we could serve more clients



The census more than tripled in five years



By serving more clients, we were able to increase revenue



# FINAL THOUGHTS

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# THANK YOU

RELATIONSHIP MARKETING:  
How To Grow Your Organization - One Person At A Time

# RESOURCES – MARKETING/BEHAVIORAL HEALTH INDUSTRY STATS

- What Percentage of Gross Revenue Should Be Used for Marketing & Advertising? *Article:* <https://smallbusiness.chron.com/percentage-gross-revenue-should-used-marketing-advertising-55928.html>
- A Practical Guide To Determining Your Perfect Marketing Budget *Article:* <https://www.forbes.com/sites/steveolenski/2015/12/21/a-practical-guide-to-determining-your-perfect-marketing-budget/#30de51d360d8>
- What Do Different Industries Spend on Marketing? *Article:* <https://blog.indinero.com/marketing-spend-industry-breakdown>
- Average Marketing Budgets Of Health Care Companies In The United States In 2016 And 2017, By Type (In Million U.S. Dollars) *Article:* <https://www.statista.com/statistics/275384/marketing-budgets-of-us-health-care-companies/>
- 3 Things Every Healthcare Marketing Budget Should Include For 2016 *Article:* <https://www.kunocreative.com/blog/2016-healthcare-marketing-budget>
- Medicare Reimbursement *Article:* <https://www.socialworkers.org/Advocacy/Policy-Issues/Medicare-Reimbursement>
- Behavioral Health Industry Update - July 2017 *Article:* <https://www.stoutadvisory.com/insights/industry-update/behavioral-health-industry-update-spotlight-substance-abuse-treatment>

# RESOURCES – CULTURE

- Start With Why – Simon Sinek *TED Talk*: [https://www.ted.com/talks/simon\\_sinek\\_how\\_great\\_leaders\\_inspire\\_action](https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action)
- Patrick Lencioni *Books*: <https://www.tablegroup.com/books/>
  - The Advantage
  - The Five Dysfunctions Of A Team
- Leader Who Had No Title – Robin Sharma *Book*: <https://www.robinsharma.com/book/the-leader-who-had-no-title>
- Three Differences Between Managers and Leaders *Article*: <https://hbr.org/2013/08/tests-of-a-leadership-transiti>
- Why it's Important to Build a Good Work Culture *Article*: <https://www.entrepreneur.com/article/270338>
- Why Corporate Culture Is Becoming Even More Important *Article*: <https://www.forbes.com/sites/larryalton/2017/02/17/why-corporate-culture-is-becoming-even-more-important/#1f51380569da>



# RESOURCES – COMMUNITY OUTREACH

- Social Media Planning *Article*: <https://www.openminds.com/market-intelligence/executive-briefings/40-consumers-wont-know-without-social-media-plan/>
- Social Media Demographics *Articles*:
  - <https://sproutsocial.com/insights/new-social-media-demographics/>
  - <http://www.pewinternet.org/2016/11/11/social-media-update-2016/>
- Online Reviews *Article*: <https://www.openminds.com/market-intelligence/executive-briefings/cant-ignore-online-reviews-can/>
- Consumer Reviews *Article*: <https://www.openminds.com/market-intelligence/executive-briefings/oh-those-consumer-reviews/>
- Press Release Writing *Article*: <https://coschedule.com/blog/how-to-write-press-releases-examples-templates/>
- Press Release Distribution (Not Free): <https://www.prnewswire.com/>
- Free MailChimp Account: <https://mailchimp.com/help/about-the-forever-free-plan/>

# RESOURCES – CUSTOMER SERVICE

- One Minute Service – Bruce Loeffler *Book*: [https://www.barnesandnoble.com/p/one-minute-service-bruce-loeffler/1102878149/2679071462949?st=PLA&sid=BNB\\_DRS\\_New+Marketplace+Shopping+Books\\_00000000&2sid=Google\\_&sourceId=PLGoP211463&gclid=Cj0KCQjwnNvaBRCmARIsAOfZq-1C7Cfy3xCEYupydzCb4j60kKMLjbRGrdqB5s7bc1t74zPCpSzHZMcaApCYEALw\\_wcB](https://www.barnesandnoble.com/p/one-minute-service-bruce-loeffler/1102878149/2679071462949?st=PLA&sid=BNB_DRS_New+Marketplace+Shopping+Books_00000000&2sid=Google_&sourceId=PLGoP211463&gclid=Cj0KCQjwnNvaBRCmARIsAOfZq-1C7Cfy3xCEYupydzCb4j60kKMLjbRGrdqB5s7bc1t74zPCpSzHZMcaApCYEALw_wcB)
- Be Our Guest – The Disney Institute & Theodore Kinni *Book*: <https://www.amazon.com/Be-Our-Guest-Perfecting-Institute/dp/1423145844>
- The Customer Rules – Lee Cockerell *Book*: <https://www.amazon.com/Customer-Rules-Essential-Delivering-Sensational/dp/0770435602>
- 22 Customer Support Statistics That You Absolutely Need to Know *Article*: <https://www.groovehq.com/support/customer-support-statistics>
- 8 Reasons Marketing and Customer Service Should Collaborate *Article*: <https://blog.hubspot.com/service/marketing-and-customer-service>
- Marketing Is Everyone's Job *Presentation*: <https://www.openminds.com/market-intelligence/resources/marketing-apart-everyones-role-job-description-coffee-break-case-study/>

# RESOURCES – DESIGN ELEMENTS

- Social Media Toolkit: <https://www.socialmediatoolkit.co/toolkit>
- Social Media Image Templates – Canva: <https://www.canva.com/>
- Social Media Image Templates – Pablo: <https://pablo.buffer.com/>
- Graphic Design Templates – Envato (\$30/month): <https://elements.envato.com/>
- Graphic Design Templates – Snappa: <https://snappa.com/>
- Free Stock Photos – Pexels: <https://www.pexels.com/>
- Free Stock Photos – Pixabay: <https://pixabay.com/>
- Free Stock Photos – Librestock: <https://librestock.com/>
- Free Stock Photos – Librestock: <http://www.designerspics.com/>
- Free Icons – Flat Icon: <https://www.flaticon.com/>
- Infographic Creator – Easelly: <https://www.easel.ly/>

# FREE RESOURCES – FOR CLINICIANS

- Substance Use Topic Library: <https://www.psychu.org/resource-library/topics/co-occurring-substance-use/>
- Alcohol Use Disorders Identification Test (AUDIT-C) *Psychiatric Scale* : <https://www.psychu.org/alcohol-use-disorders-identification-test-audit-c/>
- Opioid Risk Tool© (ORT) *Psychiatric Scale*: <https://www.psychu.org/opioid-risk-tool/>
- Mental Health Treatment Best Practices *Psychiatric Scale* : <https://www.psychu.org/resource-library/collections/mental-health-treatment-best-practices/>
- HEDIS® Behavioral Health Measures: An Update From NCQA© *Presentation*: <https://www.psychu.org/hedis-behavioral-health-measures-update-ncqa/>