



Referral Marketing: A Team-Based Approach in the B2B Space

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Learning Objectives

- Learn how to leverage existing assets in provider content marketing.
- Learn best practices for provider-to-provider marketing messages.
- Leave with a playbook on how to implement a results-oriented referral marketing strategy in your organization.

What is Referral Marketing?

- Two types:
 - Provider referrals
 - Patient referrals
- Provider referrals = Written requests from one provider to another for diagnosis/treatment of a patient for a particular condition
- Typically from a general practitioner to a more specialized practitioner

52% of patients say that referrals from medical professionals are one of the most important factors when choosing a doctor.¹

Why is Referral Marketing so hard?

- Buyers aren't pulling your product off a shelf.
- For many specialties, there's a long consideration and purchase cycle.
- Established referring patterns are hard to break.
- You have to develop relationships first...internally and externally.

POLL: How many of you have a hard time getting a seat at the table?

SWOT Analysis



Strengths

- Strong physician and admin leadership
- High patient satisfaction scores
- Productive research and innovation mechanism
- New neonatology fellowship



Weaknesses

- CFNC did not trust marketing
- DTC marketing ineffective
- No B2B marketing function
- Too many online referral options caused confusion



Opportunities

- Fastest growing metro area in the USA
- Over-indexed on young families = lots of babies



Threats

- Bigger, regional health system moving into direct competition
- Local MFM market in flux - leaving, joining, acquiring, etc.

Building Your Referral Marketing Strategy



CHOOSE YOUR PARTNER(S)

Clearly identify and understand the specific service lines or programs you will support.

Start with a test case or proof of concept - who is most likely to partner with you?

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DATING

Ask questions.
Get to know them.
Understand their vision & the biz.

NEXT LEVEL

Build trust. Deliver.
Learn from each other.
Wine and dine them
with small wins.

COMMITMENT

Develop a strategy.
Execute.
Grow and evolve.

PARTNERS

Leverage assets.
Plan for the future.
Weather the storms.

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Whether it's increasing brand awareness, generating referrals, or recruitment, clear objectives will help you stay focused and track your progress

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How will you differentiate your program?

Clearly identify and understand what sets your clinical experts apart. Why would other clinicians listen to them? What value can you offer a busy provider?

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EVALUATE THE OPERATIONS

Is the service line marketing ready for this professional audience and its expectations?

What is your CTA - do you need to build it? Can Physician Relations offer any field intelligence to inform your work? Do you need research?

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CREATE ENGAGING CONTENT

Develop high-quality, relevant, and valuable content that resonates with your target audience.

Consider various content formats such as blog posts, videos, infographics, podcasts, and interactive experiences.



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Think Like a Doctor

- 01 Higher Reading Level - More Clinical
- 02 Doctor-to-Doctor Communications
- 03 Outcomes - They are Scientists
- 04 Influencers




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Curate Rather Than Create

- Research and publications
- Press releases and articles
- CMEs and grand rounds
- Videos
- Surgery livestreams
- Lectures and speaking engagements



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Repurpose, Repurpose, Repurpose

Name	Website	Email	LinkedIn	Doximity	Podcast
Transverse Limb	✓	✓	✓	✓	✓
Prenatal Detection of CHD	✓	✓	✓		✓
4-D Fetal Cardiac Imaging	✓	✓	✓	✓	
Grand Rounds	✓	✓	Pull quote		✓



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...and in our **Innovation Report**

Three Key Take-Aways

- Take the time to build a strong foundation.
- Work smarter, not harder.
 - What already exists that you can leverage?
 - Bonus if it's ongoing content generation that you can leverage.
- Pay attention to the details!
 - Optimize profiles
 - Look at online reviews
 - Listen to the field intelligence



Questions?

Please be sure to complete the session evaluation!





Shelly Caldrello, Director of Physician Relations

With more than 20 years of experience in healthcare physician relations, marketing, and sales, Shelly is passionate about developing strong internal and external relationships through understanding each client's needs.

Before moving to Phoenix, Shelly was manager of the Colorado Fetal Care Center, manager of Brand Marketing for UHealth, director of Business Development for South Denver Cardiology Associates, and art director for *TWINS* magazine.

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Loren Farquhar, Principal

Loren Farquhar has more than 20 years of experience in healthcare marketing and communications. Before founding her consultancy in 2021, she served as the vice president of Marketing & Communications for Luminis Health. During her career, Loren has worked for both payers and health systems, giving her a deep understanding of how the industry works – and what it takes to succeed. She is skilled at taking the complex and making it understandable, as well as identifying where clinical expertise and strategic priorities intersect with key decision points on the consumer journey.

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Bibliography/References

1. [RepuGen Patient Survey 2021](#)