



# Healthcare Association Digital Transformation Playbook

EBOOK



# WELCOME TO THE FUTURE

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Technological change never slows down. Rather than resist progress, many associations are embracing that change. By leveraging innovative digital tools, they're able to provide better services and attract new members.

But that doesn't mean change is easy. Shifting online environments come with challenges. Digital evolution is how your association transforms into a finely-tuned, agile organization that can meet those challenges. Your association matters more than ever. Integrated cloud-based digital solutions give your organization the power to fulfill its mission and provide an enhanced membership experience.

The future is now, and there's never been a better time to get started.

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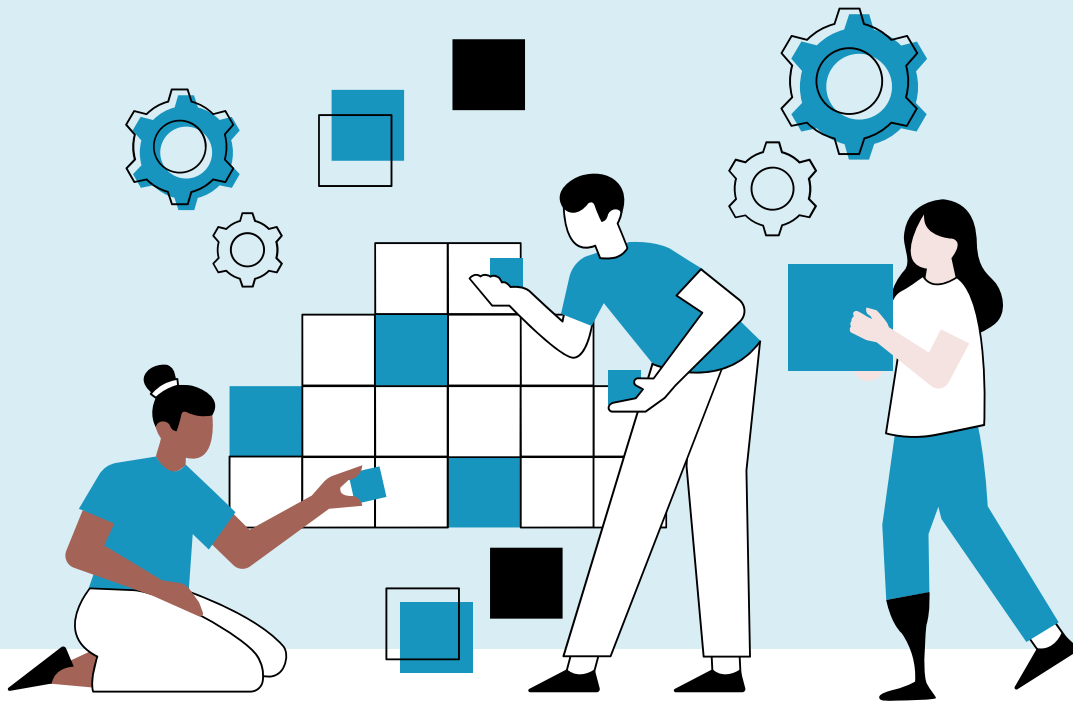
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# Part 1: Digital Transformation



Like many things, marketing has completely transformed in the digital age. Modern digital channels spread messages faster and wider than ever before. It's critically important to take advantage of this fact.

Digital transformation is the process that upgrades your existing systems to make them compatible with high-speed digital communication tools. Your marketing strategy depends on it.

And though it may not be easy, it's not as difficult as you might think.

**So let's get started.**

# Why digital transformation?

Technology has completely changed how we communicate, conduct transactions, and do our jobs.

Businesses across all industries are adapting to a shifting digital world. Healthcare associations are no exception. In order to serve the next generation of healthcare workers, associations must offer the kinds of services that new and existing members now expect.

For many associations, that means digital transformation is needed. Too many associations continue to operate using traditional processes that no longer serve them in a digital-first economy.

As a result, their memberships are declining as new professionals turn to other organizations that provide the digital services and communications they need.



# Digital Transformation is the Answer

Digital transformation solves challenges posed by the rapid pace of technological change, shifting membership needs, and new ways of working.

Imagine logging into a system with one interface that connects all organizational departments.

Picture a system that just “works” to coordinate activities within your association and unite your team.

Now envision how it all comes together to provide better services that grow memberships and boost revenue.

Digital transformation makes this possible by upgrading your existing systems to share data and provide tools that improve efficiency and increase productivity.

# Don't Be Like Blockbuster

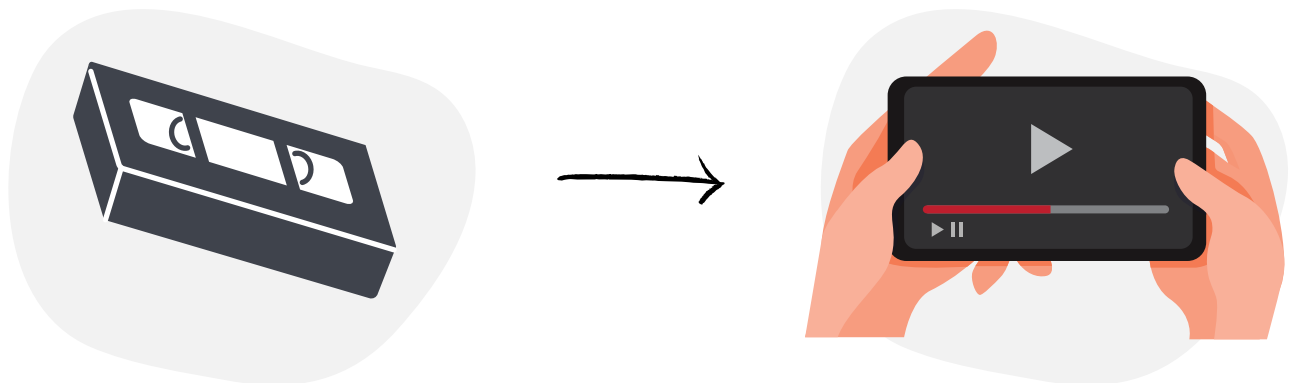
Remember Blockbuster? From 1999 to 2010, it dominated the home video market with over 9,000 stores across the world.

Today there is only one left — “The Last Blockbuster,” as people call it, in Bend, Oregon. Not all video rental companies suffered a similar fate.

Unlike Blockbuster, companies like Redbox and Netflix adapted to new technology. Netflix evolved from a DVD rental service into a multi-billion dollar streaming company. Redbox transformed by moving from its own DVD rentals to Redbox on Demand. Both companies still sold the same core product as before: video entertainment.

The difference is that they adapted their product delivery strategies to new digital methods that offered greater variety, convenience, and speed to their customers.

Your healthcare association can do the same.



# What Digital Transformation Looks Like

Digital transformation leverages the power of technology to offer an upgraded member experience using integrated cloud-based software solutions.

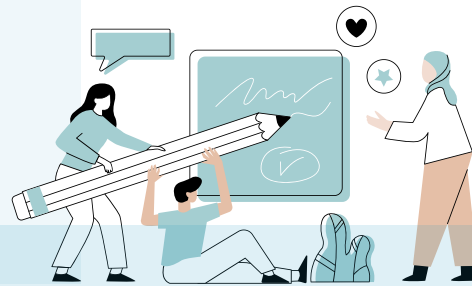
Components of digital transformation for healthcare associations include:

- ✓ Membership management systems
- ✓ Integrated accounting software
- ✓ Cloud-based learning management systems
- ✓ Digital advocacy software
- ✓ Integrated payment systems

Digital transformation initiatives adapt all areas of your association with a two-pronged approach:

## 1. Systems Integration

Systems integration brings your association into the digital age by incorporating digital technology and automation into all key roles and aspects of your business: communications, education, advocacy, and back-end operations.



## 2. A Cultural Shift

Digital transformation also requires that you change the culture from within. Some employees may be resistant to change — and that's understandable. Convince them that emerging digital tools will free up time, reduce repetitive tasks, and enable them to focus on activities that require creativity.

Employees will enjoy their newfound freedom. Managers will appreciate increased accuracy and simplified processes. And your board members will be satisfied with a verifiable return on investment (ROI) that increases over time.

# Benefits of Digital Transformation

Nonprofits and associations differ significantly from most commercial businesses — and every dollar must count.

Digital transformation requires a significant investment. However, the benefits provide a substantial ROI in the long term.

Modern software provides significant advantages that allow your organization to:

- Automate member communications
- Increase member engagement
- Automate dues collection
- Provide interactive online training
- Streamline financial processes
- Easily organize live events
- Organize advocacy campaigns
- Easily publish website content
- Track metrics in real time
- Personalize dashboards and reports

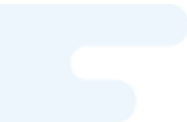
And don't be intimidated by the technological aspect. Today's systems are easier to use and require minimal to no coding.

# Components of Digital Transformation

Digital transformation unites systems across your organization to share data and leverage cloud-based features. Before considering the benefits of modern software, think about the drawbacks of your current legacy system by asking the following questions:

- Is your current website easy to use?
- Does your website look professional? Does it match the user experience offered by other websites in the healthcare industry?
- Does data need to be re-entered multiple times across departments?
- Is it easy to publish to your website and update social media accounts simultaneously?
- Can employees create courses with minimal training?
- Do members get automated due renewals with easy payment options?
- Does your software automatically update accounting systems with member payments?
- Does your online portal offer resources that members can easily access?
- Can employees easily upload and change member resources on your website?

Systems of the past were often uncoordinated and made the above tasks difficult — even for technologically-savvy employees. Today's integrated cloud-based software makes these processes easier than ever before. When considering upgrading your systems, look for features that enable your organization to:



# **Effectively manage and engage your members**

Imagine handling multiple membership functions on one interface, including membership, fundraising, content marketing, continuing education, and much more.

Modern membership systems take classic CRMs up a notch to provide healthcare associations with:

## **Easy website publishing**

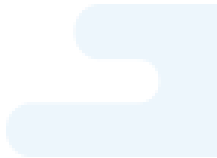
Publish to your website and automate social media updates on one interface. Customized membership applications fuse member management and website content creation to provide a seamless back-end experience with minimal coding.

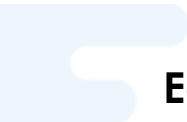
## **Automated tasks**

Automate emails, schedule tasks, and alert staff on critical items that improve the membership experience. As a result, back-end processes are streamlined to reduce data entry, minimize redundant tasks, and improve efficiency across your entire organization.

## **Data-powered membership management**

Easily manage contact information like addresses, emails, and phone numbers. You'll also have access to user data that enables marketers to create precision marketing campaigns and customized communications.





## **Easy event organization**

Modern software takes care of many administrative functions, allowing your team to focus on organizing events that offer members a unique experience. Event-based tools enable you to automate registrations, payments, and promotions so employees can use their creativity to organize “must attend” industry events.

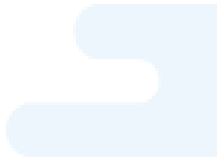
## **Precision marketing strategies**

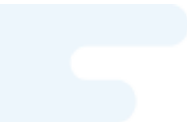
Boost communication and collaboration with your member community with membership management systems specifically tailored for healthcare associations. You'll be able to customize communications, leverage social media tools, and create precision advertising campaigns backed by robust data analytics.

## **Streamline financial processes and go data-driven**

Accountants and finance professionals thrive on quality data to make critical decisions that make a lasting impact on your organization. Today's integrated software solutions provide that information quickly with near real-time data that lets them know exactly what's happening, right now. The days of waiting for monthly and quarterly financial reports are over. Instead, modern software solutions now integrate with multiple systems to provide accurate information, allowing managers to make timely decisions and pivot their strategy when required.

Picture dashboard analytics customized to reveal the information you need with personalized reports produced in seconds. Finance software tailored for healthcare associations provides tools required by accounting teams to unlock the power of data to streamline processes and enhance decision making.





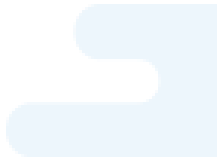
## **Make recurring dues payments and donations easy**

The growth of e-commerce has led to increased consumer demand for convenient payment options. Build trust with your audience with upgraded tools that improve the payment experience when purchasing goods, registering for courses, or paying dues on your website. Avoid buggy or outdated software that hangs, takes too long, and leaves your users questioning the professionalism of your organization.

Connected software simplifies the payment process, making transactions easier for members while streamlining back-office processes. As a result, duplicate data entry is eliminated and redundant tasks are reduced while improving the overall member experience.

## **Create engaging continuing education courses that help members reach their career goals**

Internet users of all ages are familiar with on-demand educational services through the growth of online learning services. Match competitors by offering the same experience on your website. Easy-to-use learning management systems make it possible to produce industry-standard academic courses that allow members to register, pay, and track their progress easily.



Continuing education is mandatory for most professions in the healthcare industry - so why not create an online portal that members can trust while boosting revenue? Offering on-demand continuing education services is a surefire way to improve services while adding value to association memberships.

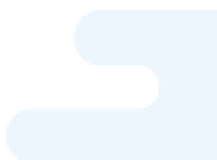
## **Upgrade your event experience**

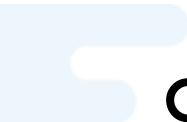
Covid-19 restrictions took many events online. While in-person events are now back, associations can continue to leverage digital tools to hold webinars and other educational presentations that increase profits and improve membership services.

Integrated software also provides critical data analytics that boosts marketing efforts through meaningful insights that include:

- Total participation by customer segment
- Length of time attended by each member
- Most-watched guest speakers
- Sessions abandoned before completion
- Event times and lengths with the highest participation
- Number of event shares across social media

Collecting meaningful data enables associations to plan better online and in-person future events. As the demand for webinars, seminars, and continuing education continues to grow, associations can take advantage of digital tools to tap into this valuable market.





## **Give members a voice on critical healthcare issues**

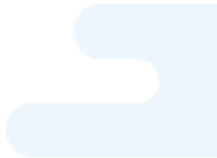
Many people enter the medical industry to help others. Associations can help them make a positive impact by enabling them to self-organize and advocate for issues that affect the industry, their workplace, and the communities they serve.

Digital software that integrates with your membership management system helps you create grassroots campaigns that target politicians responsible for legislation that affects the industry. Connected tools effectively promote your efforts throughout social media and allow members to take action in a few clicks.

Healthcare workers - especially the younger generation - want to feel like they are part of something bigger than themselves. Engaging in social cause marketing is a way to expand your reach to include this audience and give them a way to maximize their impact on issues they care about.

## **Leverage the power of social media**

COVID-19 restrictions led to the creation of online communities on social media networks. Associations can leverage this shift to promote events, educational courses, advocacy efforts, and other activities. In addition, social media networks provide advertising tools that leverage precision analytics to target your ideal audience.



# Digital Transformation Sets the Foundation for Online Marketing Success

Digital transformation is essential to executing a successful marketing strategy.

Integrated healthcare software and strategy solutions make it possible with cloud-based tools that connect your members, improve efficiency, and increase productivity.

Once the right systems are in place, you're ready to harness the power of technology to market to your ideal audience.

**So let's move on to Part 2: Digital Marketing**

# Part 2: Digital Marketing



The internet has completely revolutionized marketing. Businesses no longer have to spend excessive amounts on mass advertising and billboards.

Search engines can now bring the right clients directly to you. Viral images and videos can hit millions of screens in seconds. It all depends on the right message and digital infrastructure to back it up.

With the right systems and strategies in place, your association can access a nearly unlimited audience in a few clicks.

**So let's begin.**

# How Digital Transformation Powers Online Marketing

Let's first get back to basics.

Marketing is loosely defined as a set of practices that enable a business to share its message with a target group of prospective customers. These fundamentals remain unchanged - despite the progress of technology.

Effective communication is the key. Since the internet revolution, marketing strategies have adapted to leverage the combined power of images, sounds, and visuals backed by high speeds and connectivity.

Healthcare associations can take advantage of digital innovation to better connect members with industry-related services, continuing education, and networking services.

# Re-evaluate Your Business Model

Great marketing depends on your core services. No amount of tactics or techniques can create a lasting audience of satisfied clients without a great product or service to back them up.

That's why digital transformation is the critical first step in your strategy. With the right digital tools in place, your association is now equipped to offer better services that meet the needs of today's medical workers. So before we create our marketing strategy, let's define what your association can now provide professionals in the healthcare industry.

Some services include:

- Continuing medical education courses (CME)
- Medical resources, research, and reports via your online portal
- Industry news on the front page of your website and social media channels
- Private forums and groups on your website and social media networks
- Networking opportunities via in-person and online events
- Guest speakers via live streaming and webinars
- Multiple ways to donate to charities and social causes
- Mentorship and volunteer opportunities

Take some time to consider the above services and which ones are likely to add the most value to prospective and current members. Once you have a core set of services in place, you can create a unique selling proposition (USP).

Your USP describes the benefits of association membership, how your services solve member needs, and what sets your organization apart from the competition. Once formulated into clear, defined statements, your USP should appear on all marketing campaigns and feature prominently on your website.



# Components of an Effective Marketing Strategy

A well-researched and future-forward marketing strategy helps your association define clear, realistic, and measurable marketing objectives.

Some of the main components of an effective marketing strategy include:

- Organizational goals
- Product and service descriptions
- Market position of products and services
- Customer personas
- Competition analysis
- Marketing Tactics
- Key performance indicators (KPIs)

Staying ahead of the curve is critical to marketing success. That's why it's essential to revisit your strategy often and make adjustments that help your organization adapt to evolving user preferences.

# 7 Steps to Creating an Effective Association Marketing Strategy

## Step 1: Start with a marketing plan

A general marketing plan provides the background information needed to create an effective marketing strategy. Marketing plans vary considerably from industry to industry, and their contents depend on the type of business.

All organizations are different, so for this exercise, we will use the following marketing plan components:

- Business summary
- Strength/Weakness/Opportunities/Threats (SWOT) Analysis
- Goals and objectives
- Competition analysis
- Budget estimates
- Software and tools required

Some typical marketing plan components — like buyer personas and goal setting — will be covered in later steps because we believe they deserve their own section.

So let's get started with the basics:

## Business Summary

A business summary starts the marketing plan with a paragraph that outlines the name of the business, its location, and members of the team responsible for marketing activities.

## Strength/Weakness/Opportunities/Threats (SWOT) Analysis

A SWOT analysis identifies what the association does well, where it can improve, new opportunities, and threats to growth. Use the following template to conduct a SWOT analysis:

### Strengths

- Areas of success
- Popular member services
- Team strengths

### Weaknesses

- Services that need improvement
- Processes that can become more efficient
- Technology that needs to be upgraded

### Opportunities

- New target markets
- Software additions/upgrades
- Additional services that can add membership value

### Threats

- Competitor associations
- Industry changes and regulations
- Technological barriers to growth

## Competition Analysis

Associations and nonprofits operate differently than for-profit companies. Without a profit motive, some may feel they do not have the same level of competition as commercial businesses.

We invite you to look at your competition differently.

Prospective members may believe they do not need to join an association when they have other networking opportunities that include:

- Social media groups
- Website forums
- Volunteer organizations
- Newsgroups and mailing lists

The above list is just a sample of the possible competition faced by your association. In addition, consider that national and regional associations also compete for new members.

Competition analysis is critical to formulating a marketing strategy that wins over your target audience. Pick three major competitors you believe are attracting prospective members and complete the following exercise:

## Competition Analysis

| Name of Competitor  | Ways competitor outperforms my association:                                                                                                                                                                  | Action steps to improve competitive advantage:                                                                                                                              |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Example Association | <ul style="list-style-type: none"><li>• Better user experience on website</li><li>• 50,000 Facebook group members</li><li>• Conference attendance: 5000 members</li><li>• 70,000 Twitter followers</li></ul> | <ul style="list-style-type: none"><li>• Redevelop website</li><li>• Launch Facebook campaigns</li><li>• Rethink events strategy</li><li>• Create Twitter strategy</li></ul> |

Stick to a few main points when completing the exercise. And always remember that the competition will always be there, so this is a work in progress.

## Software and Tools Required

The software and tools section of your business plan details briefly what software and services your organization will use to execute the marketing plan.

Some possible software applications include:

- Membership management/engagement systems
- Cloud-based accounting software
- Learning management systems
- Advocacy software

Online tools and networks include:

- Social media networks: Twitter, LinkedIn, Youtube, and Facebook
- SEO tools: Moz, SEMRush
- Social media listening tools: Hootsuite, Brandwatch, Meltwater

Adding applications one at a time might make sense for some organizations. Others may get a better return on investment when switching their legacy software to one integrated healthcare software and strategy solution that shares data between applications.

## Step 2: Create customer personas

Do you really know your target audience?

Some association managers may believe they understand the market, however we would like to challenge you to reevaluate what you might believe about your ideal customers. In fact, marketing professionals review their customer personas regularly to ensure they're up to date with constantly evolving market conditions.

### **Your audience is larger than you think**

Consider how the medical sector has changed to include different professions in emerging sectors in the last few years. Besides the increased prominence of frontline workers, telehealth specialists, and other workers in emerging sectors, entirely new technical roles have been created to support the growing digital infrastructure.

All these people are your potential audience, and your marketing strategy should target these professionals. Besides growing your membership, a diverse group of individuals helps create a well-rounded, holistic network of medical professionals within your association.

## **The Importance of Messaging**

Effective marketing boils down to messaging. To create content that speaks to your audience, you need to know exactly who you're talking to. Mass marketing to anyone and everyone typically leads to bland messaging that is predictable and ineffective. That's why customer personas are so important.

Besides providing effective messaging, marketing to the right audience also makes business sense. When you are serving your ideal customers, you can tailor your offerings to an audience most likely to be satisfied with your services. And when your existing clients are happy, they are more likely to refer your association to other coworkers.

An effective marketing strategy typically has several different personas. For this exercise, we'll get started with your first persona by completing the following five basic sections:

### **1. Demographics**

Demographic information includes an age range, income level, education level, job title, and career path.

## **2. Goals**

Outline specific career goals for each persona, including professional goals, promotions, educational attainment, and other desired credentials.

## **3. Pain Points and Challenges:**

What challenges does your persona face in their daily life? Define these pain points to create targeted messaging that speaks directly to them.

## **4. Media Preferences**

What online media does your persona consume? List any news, industry, and social media websites, including any influencers they may follow.

## **5. How our association can help**

List ways your association can help your persona deal with challenges and pain points. Outline any educational or mentorship programs your organization can launch to help them reach their professional goals. This section is critically important for your marketing messaging and can help refine your membership services.

## **Creating a “Negative” Persona**

Some marketers like to flip this process to create a “negative” persona to identify individuals that likely aren’t a good fit for their product or service. These people may be too junior, not tech-oriented, or in an unrelated field.

Discouraging individuals that wouldn’t benefit from your service is vital because it helps prevent negative customer experiences. A few negative comments can often prevent members from joining, no

matter how many positive reviews your association receives. Creating negative personas provides the messaging required to effectively communicate exactly who benefits from joining your association and who isn't a good fit.

### **Step 3: Evaluate the member experience**

Developing buyer personas is essential to creating effective marketing messages. The next step is to look at the current member experience to identify existing strengths and any service gaps that need to be filled.

Think about your competitors when evaluating your services. Since healthcare practitioners use online services from established healthcare brands, try to match your digital services to meet - and exceed - their expectations.

Some questions to ask during this process include:

- Does your website look consistent on all devices?
- Is your portal hard to use?
- Can users find what they are looking for within a few clicks?
- Is the website accessible to users with differing vision and physical abilities?
- Is your website fast? Try using online services to test page speeds and compare your results with competitor websites.

In addition, you can send surveys to current members for their input. It also helps to contact former members that did not renew to ask how you could have served them better. The process may be time-consuming and challenging, but it's imperative that your services are up to standard before executing your marketing strategy.



## Step 4: Set association goals

To get to where you need to go, you must first define your destination. Setting goals gives your association a clear direction. Get started by brainstorming 3-5 initial goals you want to achieve within the next 3, 6, or 12 months.

Some typical goals healthcare associations set include:

- Increasing memberships
- Reducing member churn (how many members leave a membership-based organization)
- Growing continuing education revenue
- Improving social media engagement
- Increasing event registrations

To make the process more effective, use the SMART formula to set goals that are:

**S: Specific**

**M: Measurable**

**A: Attainable**

**R: Realistic**

**T: Timely**



Taking the goal examples listed above, this would set goals that look like this:

- Grow memberships by 20% in 12 months
- Reduce member churn to less than 200 in 6 months
- Increase comments on Facebook to 10 per post
- Aim for 500 attendees at next year's annual association event
- Boost online event registrations by 30% for next spring's webinar

If your goals seem out of reach in the beginning, you can break them down into actionable steps. Make sure to plan for obstacles and track your progress. And always remember that goals can be changed to accommodate changing conditions, so be prepared to shift your strategy when necessary.

## Step 5: Define key performance indicators

Key performance indicators (KPIs) are the metrics used to track progress. Each goal should have related KPIs that you track over time to ensure you are on the right track. For example, if you have a goal to grow association memberships, you can track KPIs that include:

- Website page visits
- Clickthrough rates from social media channels
- Newsletter sign-ups
- Social media engagement
- Member acquisition cost

There are hundreds of marketing KPIs to track that are associated with various goals. Choose the ones most relevant to your goals and track them regularly.

Tracking KPIs is critical because they indicate how well your marketing strategy is working. By monitoring the success of your marketing efforts, you can adjust your plan as required to ensure positive results over the long term.

## **Step 6: Set your marketing budget**

Marketing can generally be categorized as paid or organic.

Organic marketing focuses on generating engagement and website traffic through SEO-optimized content and content sharing. Conversely, inorganic or paid marketing uses advertising to quickly convert prospects to paid customers.

Neither option is better than the other as they are very different. Most associations use a mix of strategies to maximize their long-term and short-term marketing efforts.

Paid advertising includes paid search, pay-per-click ads, and social media campaigns to quickly drive traffic to optimized landing pages on your website. Consider allocating 5-15% of your sales revenue to paid advertising. If this seems too high, you can start with 2% and move up depending on your goals.

## Step 7: Start creating content

The previous steps set a solid foundation for your association's marketing strategy. Once completed, you are ready to start creating content that speaks to your target audience in various ways that include:

- Website blog posts and articles
- Guest posts on other websites
- Videos on networks like Youtube, Vimeo, and Rumble
- Email marketing
- Social media posts on networks like LinkedIn, Twitter, and Facebook

To get started, try launching two or three campaigns on the most popular networks. Track your progress and refine your strategy as needed.

And always remember that focusing on a couple of networks is much better than spreading content over too many. Building an audience takes time, so you want to make sure to nurture your channels accordingly.

# Key Takeaways

Redefining your association to adapt to the digital environment is a major step for most organizations. The process can be overwhelming at first, however taking it step-by-step makes it manageable.

Some key takeaways from this playbook include:

- Healthcare associations are losing memberships because they are failing to adapt to the needs of the next generation of medical professionals.
- Digital transformation is the answer because it modernizes your services to serve their needs.
- Modern integrated software systems provide a better member experience while increasing back-end efficiency and productivity.
- An updated software system is essential to launching an effective digital marketing strategy.
- Start with a marketing plan to develop the foundation for a successful marketing strategy.
- Create customer personas to target your ideal members.
- Evaluate the member experience and ensure it's up to industry standards.
- Set goals and KPIs. Revisit and track them regularly.
- Create content after establishing a solid marketing foundation.

# enSYNC is here to help you reach your goals.

Digital transformation is not easy. enSYNC can help.

We understand that associations and nonprofits are different, and are here to help customize digital solutions that simply work the way you want them to.

Contact us for a complimentary consultation.



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