



HEALTHCARE MARKETING PLAYBOOK

A healthcare marketer's guide
for campaign ideas, engagement,
retention, and growth



PLAYBOOK

Table of Contents

CHAPTER ONE	03
<hr/>	
Introduction: Healthcare Marketing Trends & Transformation	
CHAPTER TWO	08
<hr/>	
The Patient Journey	
CHAPTER THREE	12
<hr/>	
Nine Foundational Campaigns	
CHAPTER FOUR	26
<hr/>	
Driving Healthcare Marketing with Tech and AI	
APPENDIX	31
<hr/>	
Readiness Assessment and Checklist	

CHAPTER ONE

Healthcare Marketing Trends & Transformation



INTRODUCTION

The Digital Transformation of Healthcare Marketing

In just the past few years, the healthcare industry has seen an explosion of new consumer health brands, rapid digitization by traditional providers, and a dramatic shift in patient expectations. According to a healthcare survey, 60% of patients now expect healthcare experiences to match the convenience and personalization of other industries like retail.

Despite the best intentions of marketing teams, many are still dependent on IT to access and activate the data they need to run effective campaigns. The result is slow execution, missed opportunities, and disconnected experiences that erode patient trust.

To address these challenges, healthcare organizations are increasingly turning to Customer Data Platforms (CDPs)—a market projected to reach USD 1.6 billion by 2028.

CDPs unify patient data from multiple sources into a single, comprehensive profile, giving marketers direct access to real-time, reliable information—without the bottleneck of IT. With this unified data foundation, teams can deliver personalized, consistent communication that meets both patient expectations and regulatory standards.

Taking it a step further, AI-driven capabilities—the combination of agentic, predictive, and generative intelligence—empower marketers to scale 1:1 engagement quickly. It helps identify high-value segments, anticipates their next actions, and automates campaigns that adapt in real time. This enables teams to test more, personalize faster, and drive growth with less effort, all while maintaining trust through privacy-conscious practices.



THE DATA BEHIND THE SHIFT

Key Trends Shaping Healthcare Marketing

The path forward is clear: connected systems, smarter workflows, and data-driven insights enable more personalized care, streamlined operations, and improved experiences across the board. Here's why:

Patient Expectations are Higher than Ever

65%

of consumers now expect personalized health plans and communication, showing a clear demand for tailored engagement.

— *HealthEdge Consumer Trends, 2024*

Personalized Healthcare Starts with Data Integration

94%

of respondents agree that data-driven health care creates new opportunities for patients and doctors to benefit from more personalized health care approaches. 74% say their organization has spent more effort on its approach to data integration/interoperability in the past three years.

— *Innovation in Data-Driven Health Care, 2023*

Retention is the New Growth Strategy

80%

of patients indicate that they would consider switching providers for a better digital experience, demonstrating how the convenience of digital services directly impacts patient loyalty.

— *Yosi Health, 2025 Patient Experience Report*

By breaking down data silos and embracing the right digital technologies, healthcare organizations can meet rising patient expectations and drive better outcomes for both consumers and providers.

THE BARRIERS TO SMARTER ENGAGEMENT

Key Organizational Challenges in Healthcare Marketing

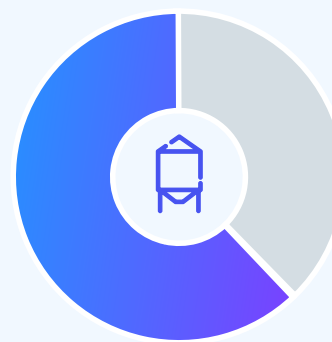
Internal barriers in healthcare marketing primarily stem from organizational complexity, data access issues, siloed technologies, compliance challenges, and IT resource constraints. Here are key barriers along with supporting statistics and reports:

Limited Data Access



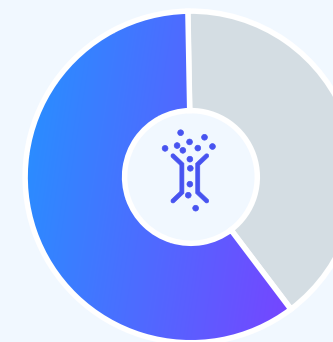
Only about **30% of healthcare marketers** report having direct, self-serve access to the customer data they need for timely decision-making, leading to dependency on IT teams.

Siloed Technology Systems



Approximately **62% of healthcare organizations** identify siloed systems and fragmented data as major barriers to effective digital engagement, making it difficult to have a unified patient view or execute coordinated campaigns.

IT Bottlenecks



More than **60% of healthcare IT leaders** say that constrained IT resources and prolonged approval processes slow down the implementation of new marketing tools, especially those handling Protected Health Information (PHI).

— Adobe Healthcare AI and Digital Trends, 2025

In addition to technology and data issues, healthcare marketers also face challenges such as lack of time and budget, which remain top barriers to digital marketing success according to industry surveys.

Unifying, Orchestrating, and Activating Healthcare Data

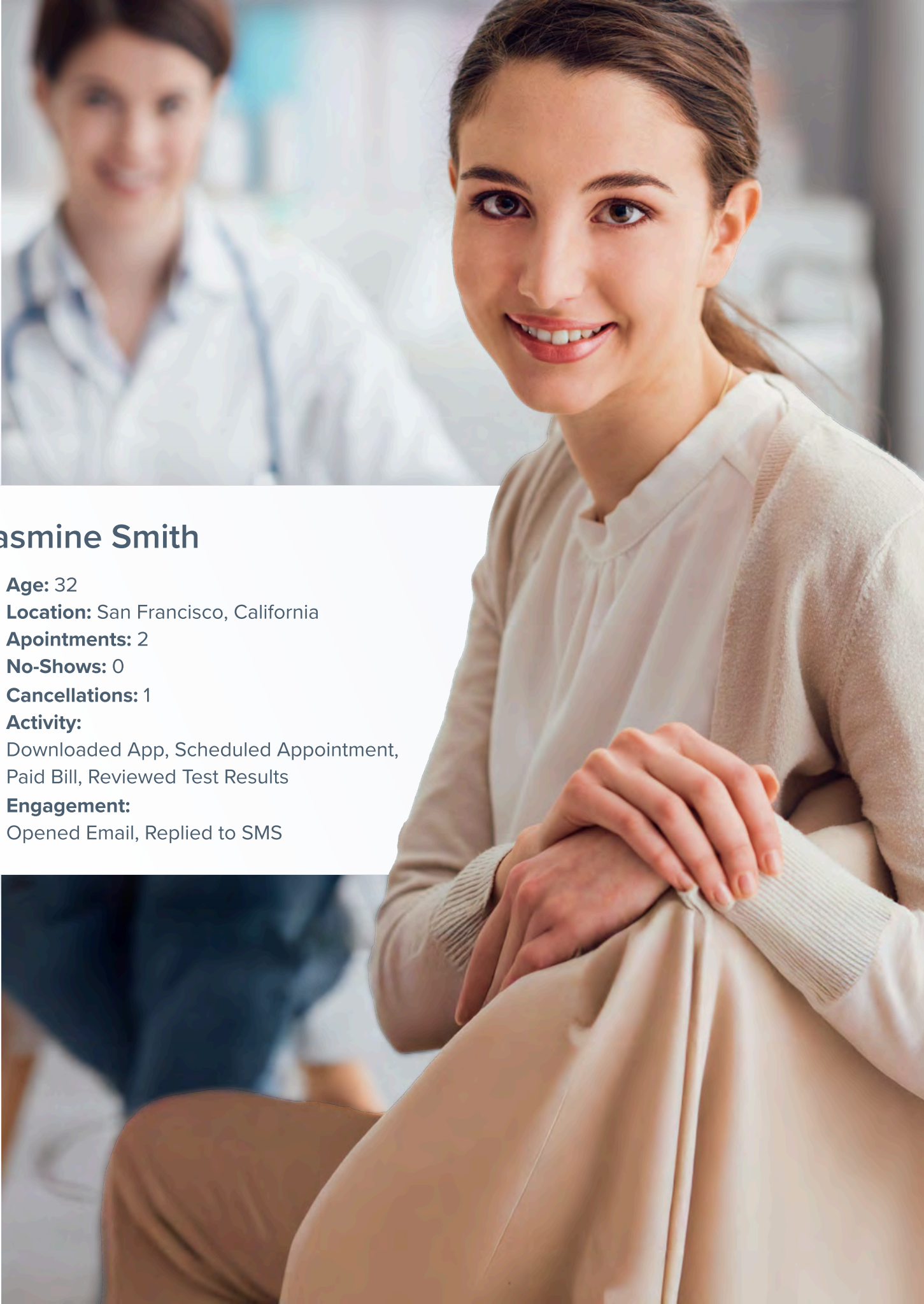
Effective patient engagement in healthcare starts with unifying data across touchpoints—EHRs, scheduling systems, digital campaigns, and mobile apps—to build a clear view of patient behavior. Yet, only 24% of providers effectively use clinical data. It’s not enough to know who’s missing appointments or skipping refills.

To drive meaningful outcomes, healthcare organizations must be able to:

- Coordinate timely, omni-channel interventions: automatically launching a targeted SMS reminder when a patient misses a refill, or following up with educational content after that patient completes an initial appointment.
- Adapt journeys in real time: recognizing when a patient is at risk of disengaging or non-adherence, and dynamically adjusting outreach to re-engage them where they’re most likely to respond.
- Personalize at scale: leveraging unified data to deliver tailored messaging and recommendations, whether it’s a wellness check for a patient due for a preventive screening or a motivational nudge for someone enrolled in a chronic care program.
- Measure impact beyond engagement: tracking not just open and click rates, but also operational metrics like reduced no-shows, increased appointment adherence, and better health outcomes.

EXAMPLE

AMN Healthcare uses an omnichannel strategy—email, SMS, and push—to engage clinicians with personalized job opportunities in real time. By unifying data and applying AI-driven send-time and channel optimization, they raised click-to-open rates from 19% to 30% in one year, improving engagement and hiring outcomes.



Jasmine Smith

- Age:** 32
- Location:** San Francisco, California
- Appointments:** 2
No-Shows: 0
- Cancellations:** 1
- Activity:**
Downloaded App, Scheduled Appointment, Paid Bill, Reviewed Test Results
- Engagement:**
Opened Email, Replied to SMS

CHAPTER TWO

The Patient Journey

PATIENT JOURNEY TOUCHPOINTS

Connecting Moments that Matter

1. Search and Discovery - Web, Social

- Patients typically begin their journey online: A study conducted by the [National Center for Health Statistics](#) found that 59% of U.S. adults used the Internet to look for health or medical information.
- Social media influences up to 40% of patient decisions, especially among younger demographics seeking peer reviews and trusted content.

2. Digital Scheduling and Intake - Mobile App, Website, Phone

- A study by [Amplify Care](#) found a 53% relative reduction in no-show rates among patients who used a patient portal with a scheduling function compared to those who booked appointments through other methods.
- Multi-channel reminder strategies (e.g., SMS + email) result in a [40% decrease](#) in no-shows compared to single-channel approaches.

3. Personalized Communications - Email, SMS, Portal

- [A study](#) showed that 78% of respondents wanted to receive appointment reminders, 56% wanted expiring insurance reminders, and 36% wanted reminders to take their medications.
- [90% of patients](#) say email reminders help them feel more connected to their provider.

4. Billing and Payment - Mobile App, Website, Payment Apps

- [71% of organizations](#) use patient portals as their primary billing channel, with 67% using email and 60% using text messaging

5. Feedback and Ongoing Engagement - Mobile App, Website, SMS

- Post-care feedback surveys and ongoing engagement via digital channels improve patient satisfaction scores and loyalty.
- Continuous engagement through mobile and SMS channels creates an ongoing relationship, fostering trust and promoting wellness or chronic care adherence.



Brian, your results are ready!



Ari, check out our patient portal!



How did we do, Sharon?



Eric, please review your insurance.

CHECKLIST

Mapping and Measuring the Patient Journey

Have you mapped all high-impact touchpoints?

- ✓ **Acquisition:** Search, reviews, website, social media
- ✓ **Activation:** Scheduling, intake, onboarding
- ✓ **Engagement:** Content, telehealth, reminders
- ✓ **Retention:** Follow-ups, billing, feedback, ongoing care

Are you measuring drop-off points?

- ✓ Where do patients abandon scheduling or forms?
- ✓ Are reminders and follow-ups reducing no-shows?
- ✓ Is there friction in billing or feedback processes?

Is patient data integrated to enable seamless, relevant messaging?

- ✓ **Secure Integration:** Are data sources (EHR, CRM, etc.) connected via secure, BAA-covered APIs?
- ✓ **Data Minimization:** Is data integration limited to what is necessary for patient engagement, adhering to the principle of data minimization?
- ✓ **De-Identification:** Are de-identified or aggregated data used for segmentation when possible, to avoid unnecessary PHI exposure?
- ✓ **Audit Trails:** Are regular audits conducted to ensure no unauthorized PHI leakage occurs between systems?

Checklist continued on next page



CHECKLIST (CONTINUED)

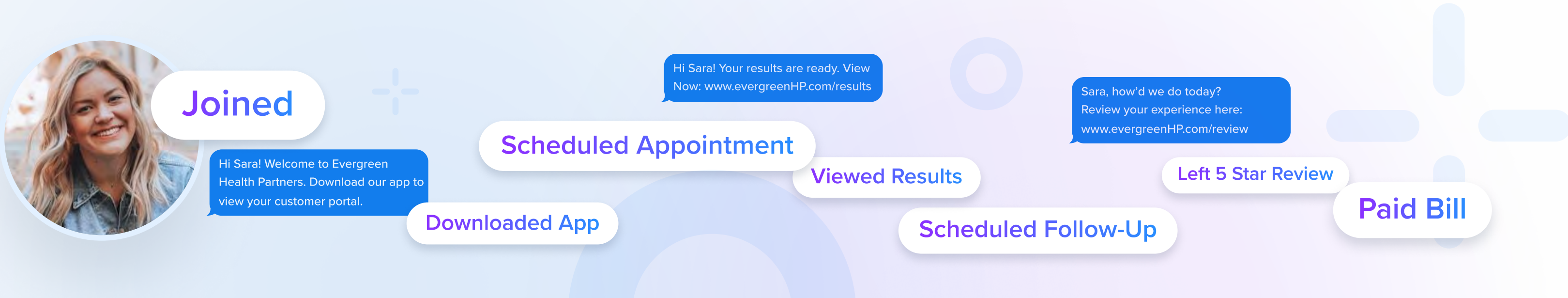
Mapping and Measuring the Patient Journey

Are communications unified and personalized across channels?

- ✓ **Consent & Compliance:** Does your system enforce channel-specific patient consent, so outreach only occurs on platforms the patient has explicitly opted into?
- ✓ **Minimum Necessary:** Does your content avoid exposing protected health information (PHI) unless absolutely necessary for clinical care?
- ✓ **Centralized Management:** Is there a centralized consent management system to honor opt-outs and channel preferences consistently across email, SMS, app, portal, and other channels?
- ✓ **Compliance Documentation:** Can you demonstrate—for audit or compliance review—that every message meets both privacy policy and HIPAA requirements?
- ✓ **Timely Updates:** If a patient revokes consent or changes preferences, are these changes reflected immediately across all channels?

Are preferences and behaviors driving the timing and content of outreach?

- ✓ **Consent-Driven:** Are you personalizing outreach using only first-party, consented data—not third-party tracking or inferred data?
- ✓ **Clinical Safeguards:** Do behavioral triggers (e.g., missed appointments) avoid exposing clinical details in marketing messages, reserving PHI for required clinical communications only?
- ✓ **Compliance Review:** Is there a process to review campaign content for HIPAA compliance before launch, especially when using behavioral or clinical triggers?
- ✓ **Dynamic Adjustment:** Are content and timing dynamically adjusted based on real-time patient preferences and consent status?



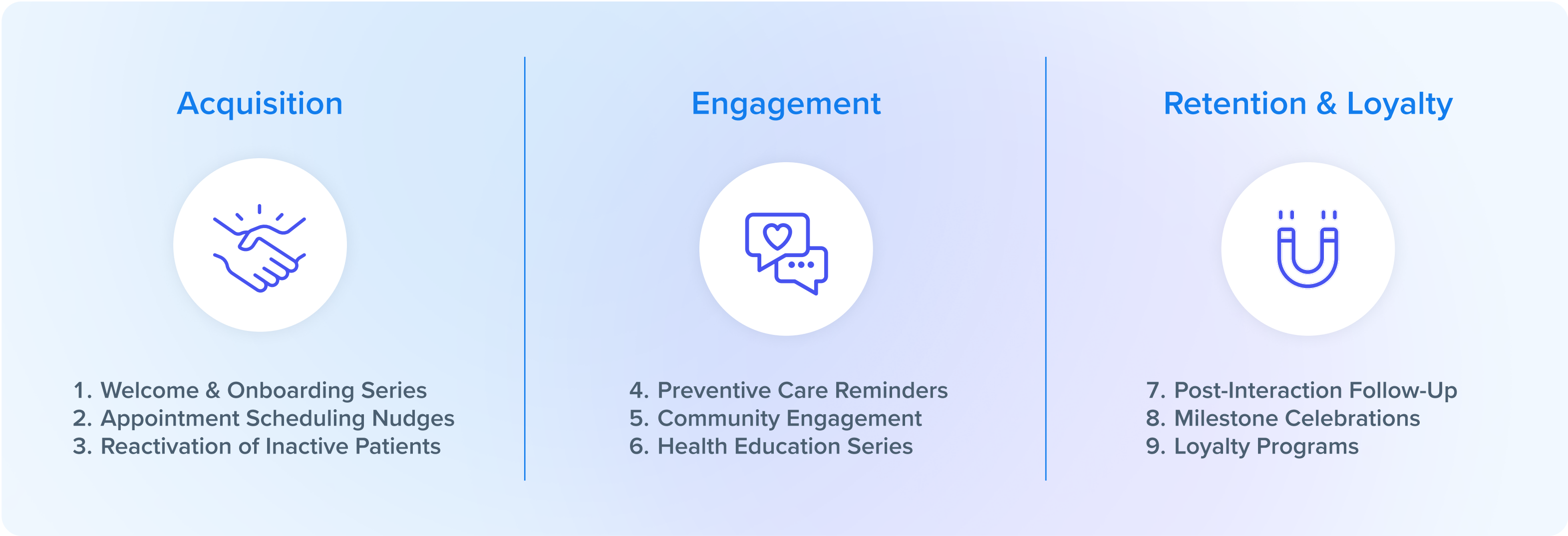
CHAPTER THREE

Nine Foundational Campaigns

FROM ACQUISITION TO LOYALTY

Nine Foundational Campaigns to Build Now

With more choices for care than ever, you need smart campaigns that guide people through their health journey. Here are nine to start with:



These nine campaigns form the foundation for building stronger patient relationships and driving measurable growth. By guiding people from acquisition to loyalty, they reduce friction, build trust, and deliver value at every step. Now is the time to put these essentials in place to stay ahead in a competitive healthcare landscape.

Acquisition Campaigns

An acquisition campaign is a coordinated marketing effort that uses multiple channels—such as email, SMS, push notifications, paid ads, and more—to attract and convert potential patients or providers. It is important because healthcare audiences now use many platforms to research and choose providers, and disjointed messaging can lead to lost opportunities; integrated, multi-channel campaigns deliver a seamless, consistent experience that increases engagement, trust, and conversion rates.

EXAMPLE

Spring Health, a behavioral health provider, stands out for its successful acquisition campaign targeting mental health professionals. Through a data-driven digital marketing strategy, Spring Health achieved a 113% increase in provider-qualified leads and a 58% rise in actual hires. The campaign excelled by identifying and targeting optimal advertising channels to reach high-quality candidates, significantly enhancing efficiency and lowering acquisition costs.



Did You Know?

12.4% of the U.S. population still lacks a regular healthcare provider, representing substantial opportunity for new-patient acquisition..



ACQUISITION CAMPAIGNS

Welcome & Onboarding Series

Email

SMS

Patient Portal

Direct Mail

PROBLEM

New patients are often anxious or unsure about the care process, leading to incomplete registrations, missed appointments, and poor initial impressions. Without a strong, personalized welcome, patients may disengage early or not take full advantage of digital tools and resources.

SOLUTION

- Implement a multi-touch welcome and onboarding email series
- Immediate welcome email upon registration or appointment
- Follow-up reminders with onboarding checklists, profile completion prompts, and patient portal introductions
- Personalize CTAs based on patient status (e.g., completed profile, scheduled appointment)

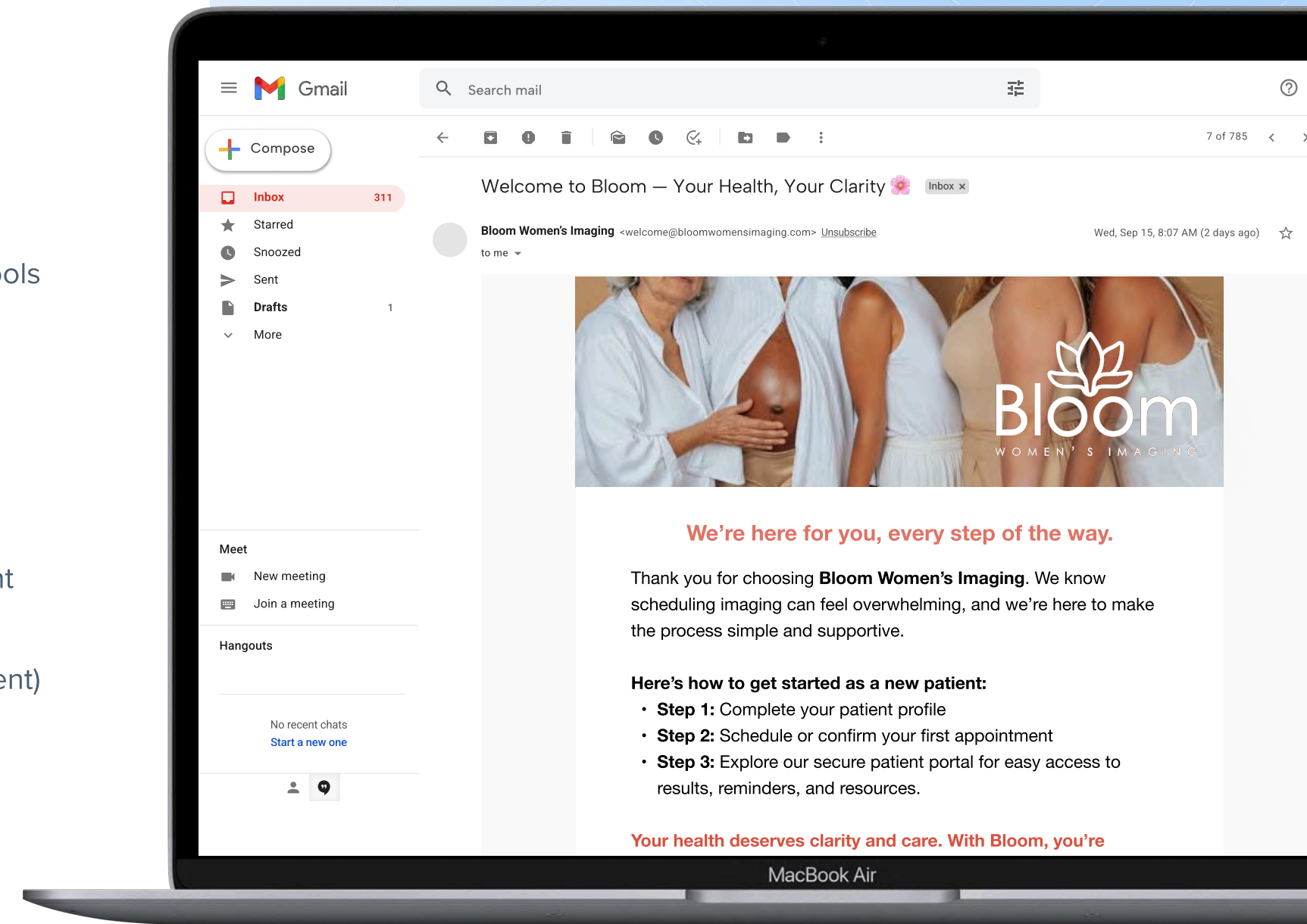
EXAMPLE

SesameRx, a prescription service, implemented a standout welcome email campaign to educate and guide new customers, delivering immediate value from the first touchpoint.



Did You Know?

60% of consumers now expect personalized health communications.



Difficulty Level ★★★★★



ACQUISITION CAMPAIGNS

Appointment Scheduling Nudges

Email

SMS

In-App Messaging

Push Notifications

PROBLEM

Patients frequently abandon scheduling processes, resulting in no-shows, delayed care, and lost revenue opportunities. Friction and forgetfulness during digital scheduling fuel high drop-off rates.

SOLUTION

- Trigger automated, personalized email nudges for patients who start but don't complete booking
- Reminders for routine or follow-up appointments based on patient records
- Include easy-access links to scheduling, support contact info, and flexible timing options

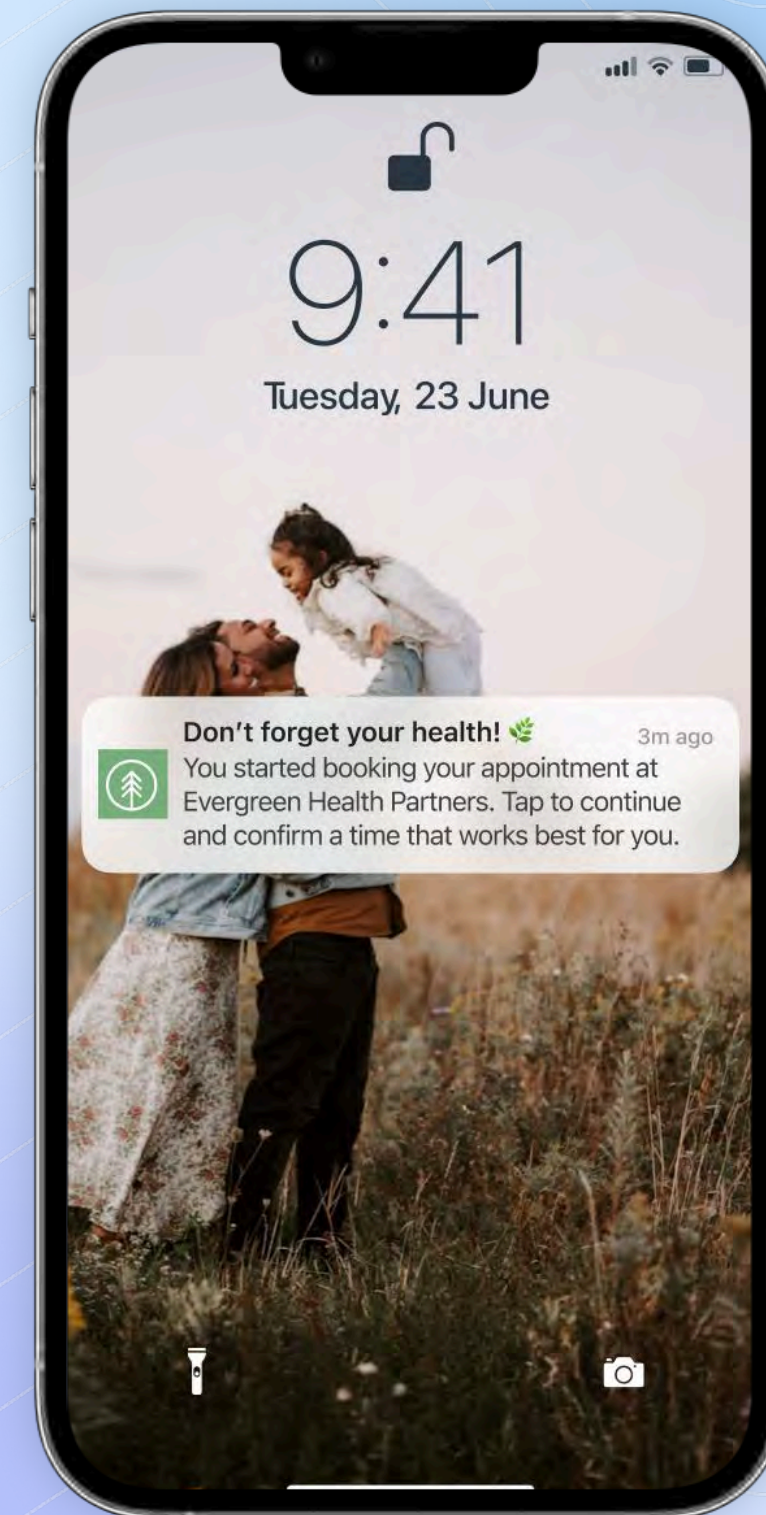
EXAMPLE

A leading Medicaid managed care plan (over 500,000 members) digitized appointment scheduling via automated outreach. The Patient Schedule platform allowed call center agents to book appointments digitally, dramatically improving appointment completion rates and streamlining follow-up, significantly increase show rates and member satisfaction



Did You Know?

Using both email and SMS reminders can decrease no-show rates by 40%.



Difficulty Level ★★★★★



ACQUISITION CAMPAIGNS

Reactivation of Inactive Patients

- Email
- SMS
- In-App Messaging
- Push Notifications

PROBLEM

Many patients become inactive over time, missing regular care and falling through the cracks. Unengaged patients mean lost trust, missed revenue, higher health risks, and greater difficulty re-engaging as time passes.

SOLUTION

- Segment lapsed patients (e.g., no visits in 6+ months) and send automated, personalized reactivation messages via email, SMS, and app
- Tailor content by referencing overdue care, previous visit reasons, or offering incentives
- Include one-click booking, support contacts, and gentle encouragement to return

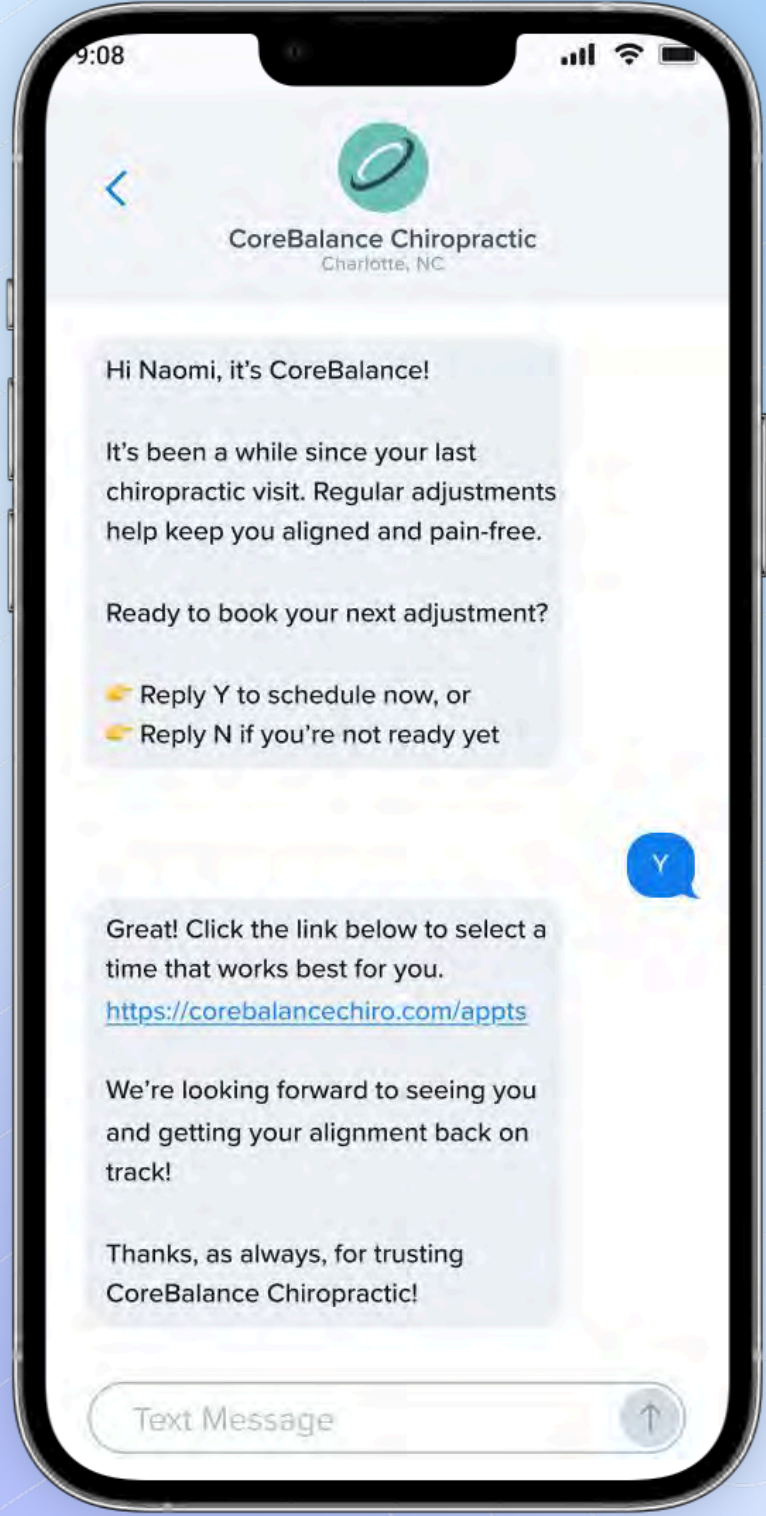
EXAMPLE

Chiropractic practices run dedicated reactivation campaigns customized for overdue or inactive patients. The process combined SMS/email reminders, easy portal access, and incentives, returning dormant patients to active care and achieving a measurable uptick in appointments and engagement metrics



Did You Know?

Reactivation campaigns can reduce overall patient churn by up to 20%.



Difficulty Level

Engagement Campaigns

An engagement campaign is a sustained initiative designed to actively involve patients in their own care through ongoing communication, education, and collaboration with providers. For healthcare marketers, these campaigns are essential because engaged patients are more likely to adhere to treatment plans, attend appointments, and participate in preventive care—all of which improve outcomes and reduce costs.

EXAMPLE

AMN Healthcare uses an AI-enabled CEP to redefine what engagement could deliver by unifying clinician outreach—email, mobile push, and SMS—through a customer data platform. This wasn’t just incremental improvement; by targeting each clinician with personalized, relevant communications based on behavioral data and preferences, AMN achieved a 50% increase in click-to-open rates.



Did You Know?

72% of health system executives ranked improving experience, engagement, and trust as a 2025 priority, driven by rising personalization demands.



ENGAGEMENT CAMPAIGNS

Preventive Care Reminders

Email

SMS

In-App Messaging

Push Notifications

PROBLEM

Patients often neglect or forget preventive screenings and check-ups, missing early detection opportunities and risking poorer health outcomes. Without timely reminders, compliance drops—leading to higher costs and preventable complications.

SOLUTION

- Use patient data to trigger personalized reminders for screenings, vaccinations, and exams
- Deliver multi-channel alerts (email, SMS, app) with scheduling links, tailored messaging, and clear calls-to-action
- Time outreach around birthdays, seasonal campaigns, or guideline windows

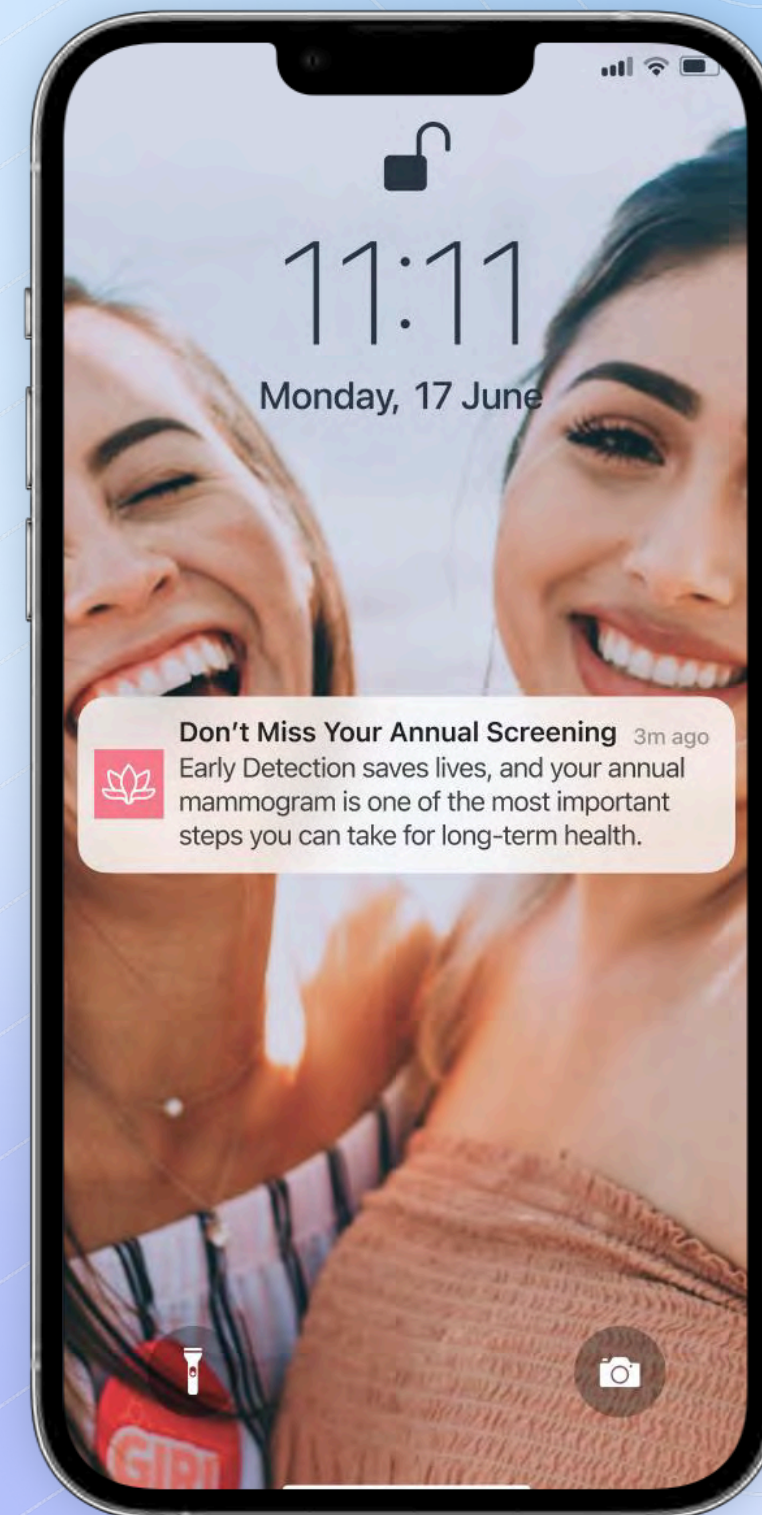
EXAMPLE

A multi-specialty practice integrated EHR data with an AI-enabled CEP to flag patients due for physicals, mammograms, or flu shots. Automated emails and SMS with personalized prompts and easy scheduling links boosted preventive appointments and improved population health.



Did You Know?

Automated reminder systems boost preventive care procedure use, with an average increase of around 13 to 16% across various procedures



Difficulty Level ★★★★★

ENGAGEMENT CAMPAIGNS

Community Engagement

Email

SMS

In-App Messaging

Push Notifications

PROBLEM

Patients often feel disconnected from providers and unaware of supportive resources or peer networks. Limited community engagement can reduce trust, loyalty, and health outcomes—especially in underserved populations.

SOLUTION

- Invite targeted patient groups to online and in-person events, webinars, support groups, and educational forums via personalized messaging
- Use segmentation to match invitations to interests, conditions, or languages, and enable interactive registration or Q&A
- Follow up through multiple channels and collect feedback to reinforce engagement.

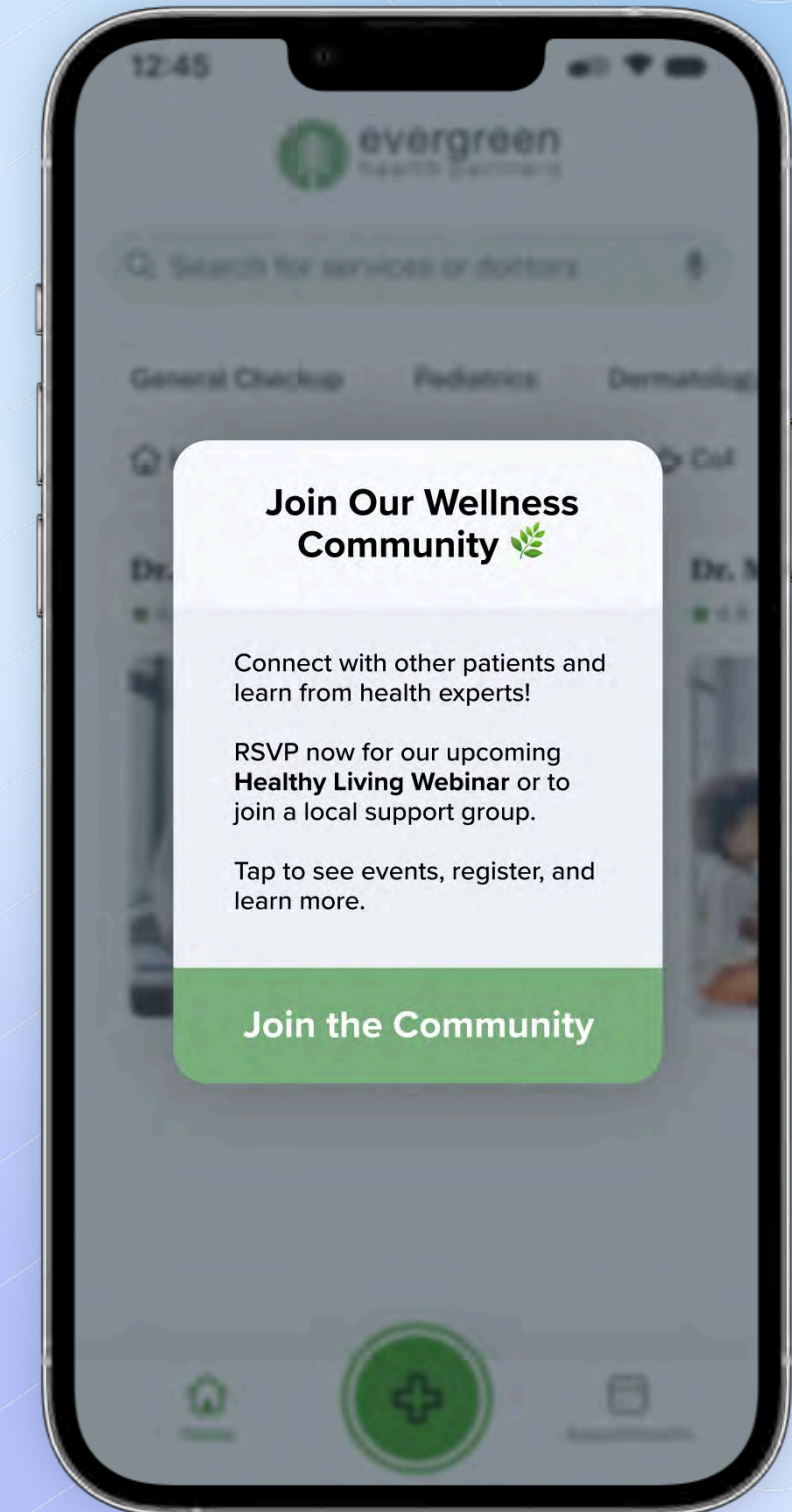
EXAMPLE

Sutter Health System sends targeted invites to webinars and support groups, increasing attendance and improving patient satisfaction and community connection.



Did You Know?

Nearly 80% of health system CEOs and senior leaders said building community partnerships and engagement is a key priority for future success



Difficulty Level ★★★★★

ENGAGEMENT CAMPAIGNS

Health Education Series

Email

SMS

In-App Messaging

Push Notifications

PROBLEM

Patients often lack clear, personalized guidance about their health, treatments, or wellness goals, leading to confusion, low adherence, and missed opportunities for better outcomes. Generic communication fails to engage diverse needs or encourage proactive self-care.

SOLUTION

- Send personalized educational content (e.g., monthly or bi-weekly emails) based on patient profiles, medical history, or diagnoses
- Include interactive tips, condition-specific guidance, medication reminders, and links to videos or community resources
- Use multiple channels to reinforce messages and drive engagement with patient portals.

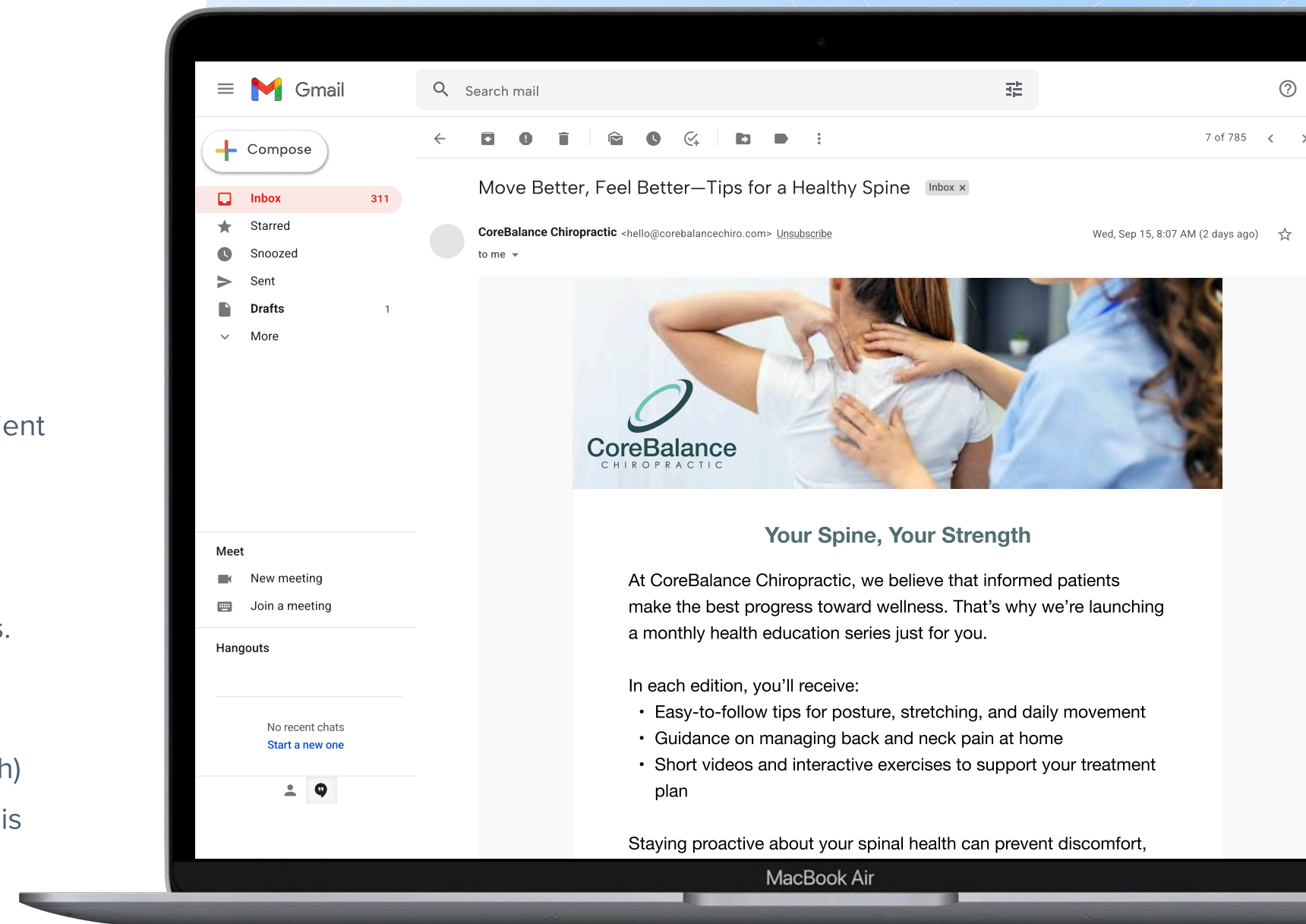
EXAMPLE

A national health system segments patients by chronic condition (e.g., diabetes, heart health) and sends monthly targeted emails with management tips, resources, and webinar links. This approach boosted open rates, click engagement, and patient satisfaction.



Did You Know?

Interventions to improve patient health literacy led to a 16% higher treatment adherence rate than those without such support.



Difficulty Level ★★★★★

Retention & Loyalty Campaigns

Retention is the new acquisition. A patient retention campaign is your strategic playbook for turning one-time visits into lifelong relationships. With acquisition costing 6–7x more than retention and 30% of patients switching providers due to frustration or poor experience, your ability to keep patients engaged is a make-or-break metric for growth and profitability. Retained patients are more likely to adhere to care plans, refer friends and family, and yield better health outcomes. They also provide a stable, predictable revenue stream, which is critical as healthcare providers face narrowing margins and rising costs

EXAMPLE

A multi-location clinic chain employed real-time SMS patient surveys after visits, achieving a 48% response rate. They leveraged this feedback to reduce waiting times and staff delays, which improved patient satisfaction and boosted retention. Additionally, they integrated online scheduling and reminder automations that reduced no-shows and encouraged repeat visits. This approach helped reduce patient churn and increased loyalty significantly.



Did You Know?

Average patient retention for healthcare providers is 77%, outperforming many industries and reflecting the sector’s focus on trust and continuity.



RETENTION & LOYALTY CAMPAIGNS

Post Interaction Follow-Up

Email

SMS

In-App Messaging

Push Notifications

PROBLEM

Patients may leave appointments without fully understanding care instructions, next steps, or medications, leading to confusion, low adherence, missed follow-ups, and lower satisfaction. Manual or generic outreach strains staff and increases risk of forgetting or misunderstanding.

SOLUTION

- Automatically trigger personalized follow-up messages within 24–48 hours after each patient interaction—visit, telehealth session, or procedure
- Include key content, like care summaries, actionable next steps, surveys, and links to portals or support staff
- Optimize delivery and boost engagement: customize channels and timing to patient needs

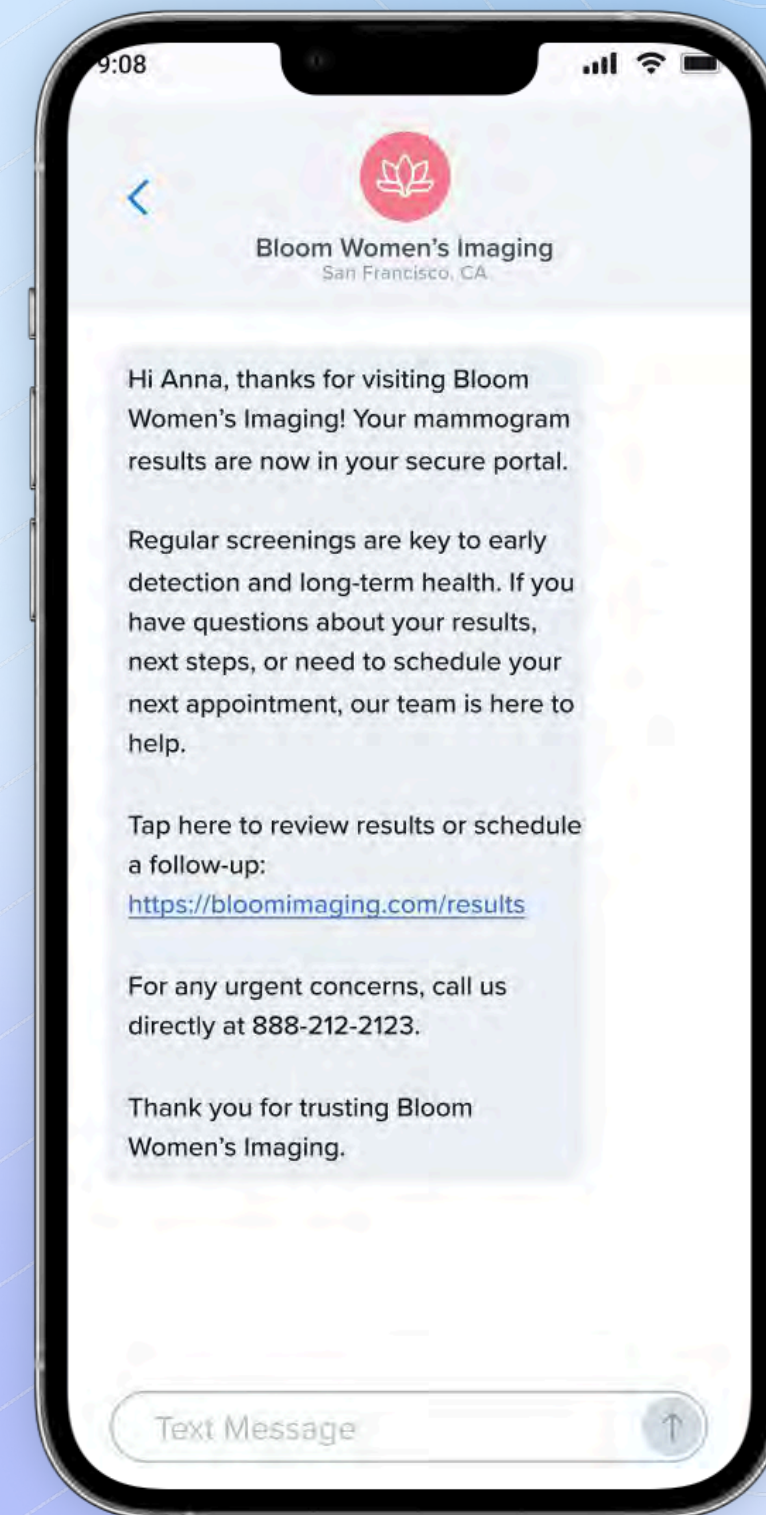
EXAMPLE

A large healthcare system automates post-visit communications via email and SMS, providing tailored recaps, reminders, and survey links. This improves care plan completion, patient satisfaction, and reduces administrative workload.



Did You Know?

20% of patients are more likely to return if they are part of a membership or loyalty program.



Difficulty Level ★★★★★

RETENTION & LOYALTY CAMPAIGNS

Milestone Celebrations

- Email
- SMS
- In-App Messaging
- Push Notifications

PROBLEM

Patients often feel like “just a number” and lack an emotional connection with their healthcare providers. Missing recognition of important milestones—such as treatment completions, anniversaries, or birthdays—means lost opportunities to strengthen loyalty, motivate continued engagement, and deepen patient-provider relationships.

SOLUTION

- Automatically send personalized milestone messages (birthdays, treatment anniversaries, recovery milestones) via multiple channels
- Include congratulatory notes, incentives, or reminders to encourage follow-up care
- Use custom logos, visual storytelling, and community events to make audience feel valued

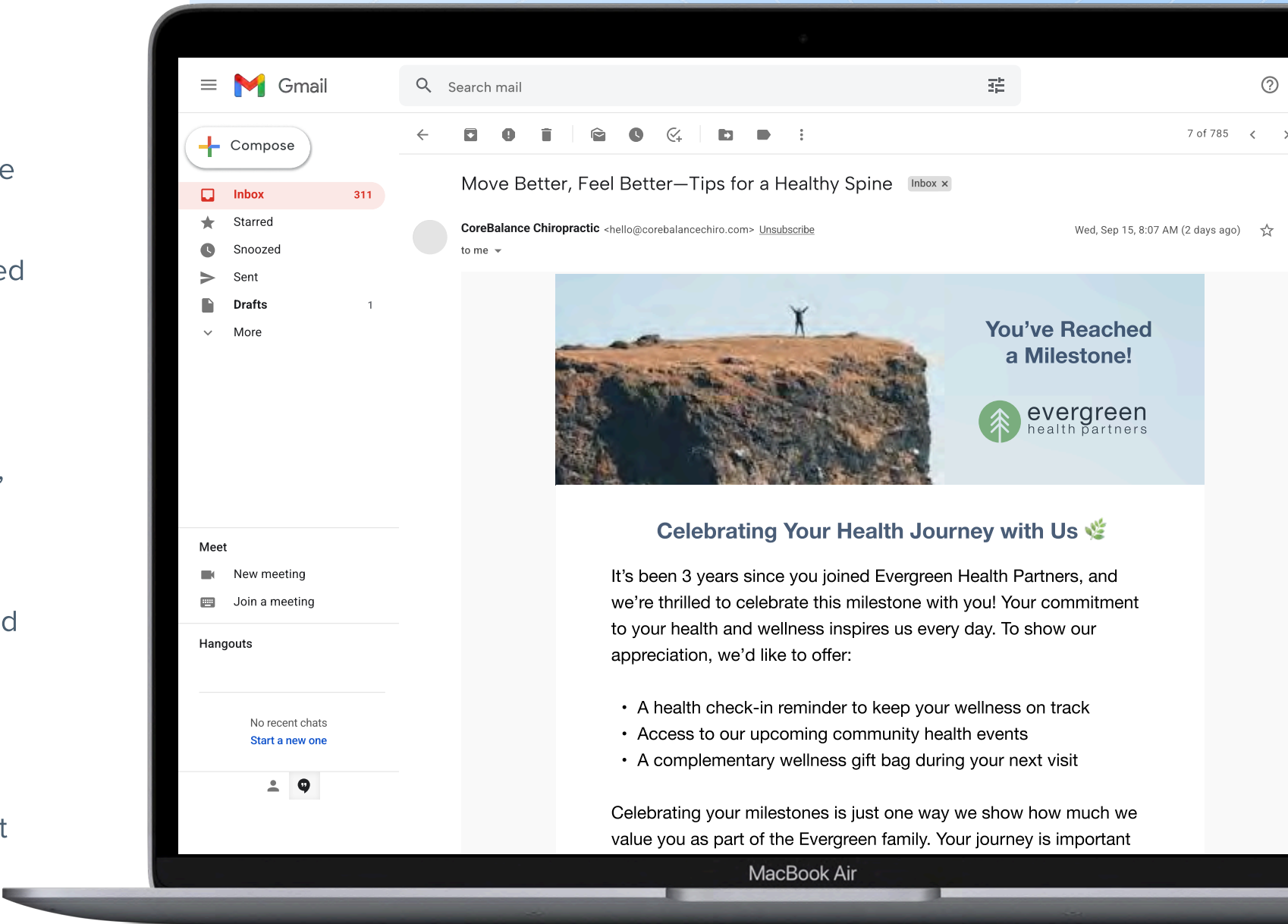
EXAMPLE

Smith County Children's Medical Center marked anniversaries with community celebrations and custom-branded materials (banners, pens, greeting cards), boosting goodwill and patient engagement at scale.



Did You Know?

An Accenture report found 83% of healthcare consumers want providers to acknowledge birthdays, anniversaries, or recovery milestones to feel valued.



Difficulty Level ★★★★★



RETENTION & LOYALTY CAMPAIGNS

Loyalty Programs

Email

SMS

In-App Messaging

Push Notifications

PROBLEM

Maintaining ongoing patient engagement and rewarding loyalty is challenging in healthcare. Without meaningful incentives, patients may feel undervalued, lowering retention, adherence, and increasing churn.

SOLUTION

- Implement automated, personalized loyalty communications for actions like appointment attendance, preventive care, referrals, and wellness program participation.
- Use multi-channel outreach to notify patients of earned rewards, points milestones, exclusive offers, and program benefits.
- Track loyalty with portals, apps, and EMRs for seamless experience and redemption.

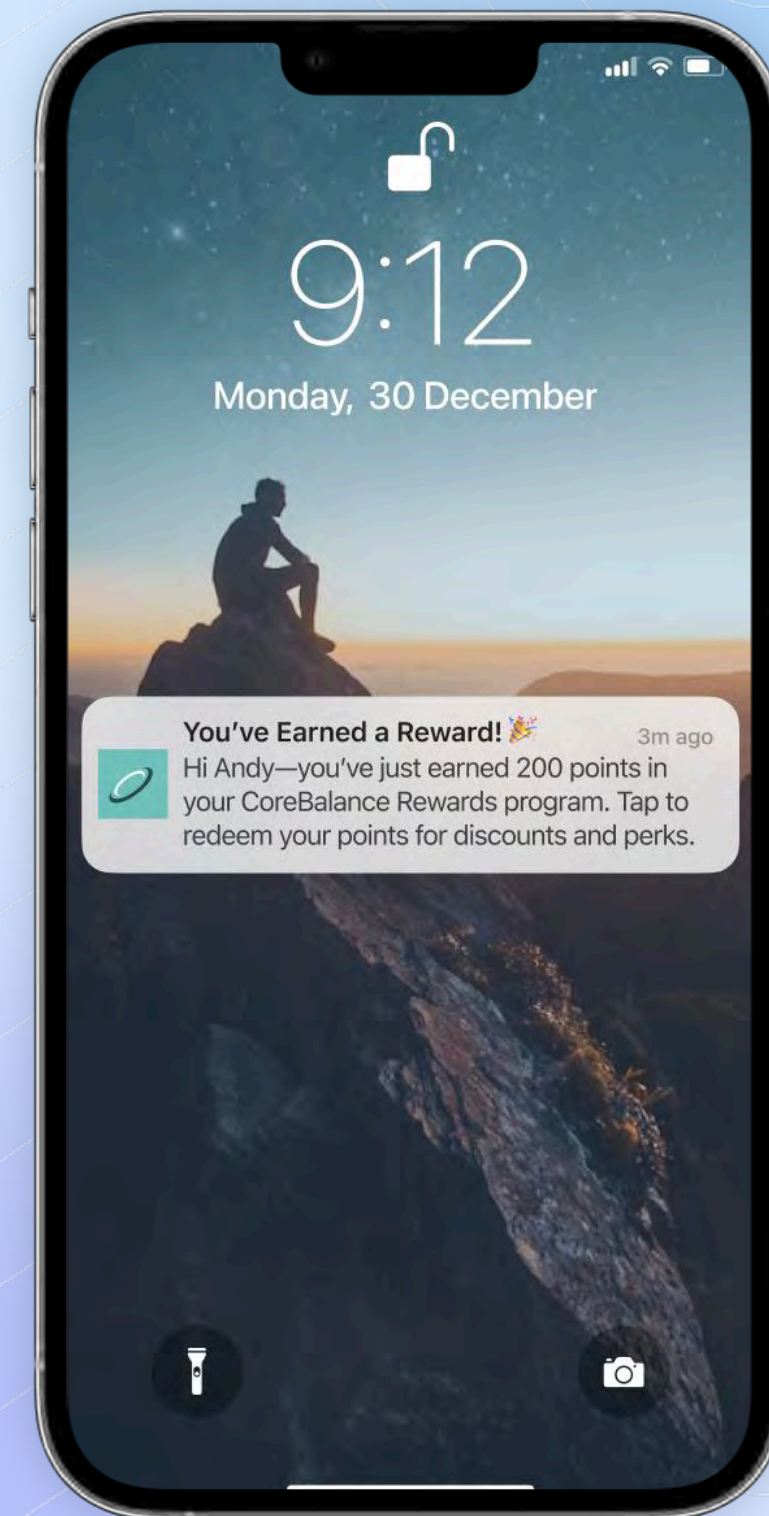
EXAMPLE

A leading healthcare system used targeted email, SMS, and push notifications to alert patients about earned points and reward redemptions. This increased loyalty program enrollment, repeat visits, and patient lifetime value.



Did You Know?

Automated, integrated loyalty communications boost patient engagement metrics by over 40%.



Difficulty Level ★★★★★

CHAPTER FOUR

Driving Healthcare Marketing with Tech and AI

BREAKING FREE FROM LEGACY BARRIERS

Why Healthcare Marketers Are Turning to AI-Enabled CEPs

Healthcare marketing today demands a partner who understands the complexity of fragmented data, evolving patient expectations, and the need for seamless, personalized engagement. Built for modern healthcare marketing teams, AI-enabled Customer Engagement Platforms (CEP) help you:

- **Unify Your Data, Without the IT Headaches:** Connect seamlessly to your existing EHR, data warehouse, and digital tools—eliminating silos and creating a single view of the patient journey.
- **Turn Real-Time Data into Real-Time Action:** Ingest and activate patient data instantly across sources, enabling timely, relevant outreach at every stage of care.
- **Move Faster, With Less Lift:** Launch sophisticated cross-channel campaigns in weeks—not months—using drag-and-drop builders and pre-built healthcare-ready templates.
- **Deliver Personalization at Scale:** Tap into built-in AI to identify high-value audiences, personalize content, optimize send times, and accelerate copywriting—no data science required.
- **Stay Secure and Compliant:** With enterprise-grade security and HIPAA-compliant infrastructure, your patient data remains protected and audit-ready.
- **Get a True Strategic Partner:** The right platform offers more than just technology—it comes with ongoing guidance, support, and training to help you succeed long after onboarding.



HIPAA MISCONCEPTIONS, DEBUNKED

HIPAA-Compliant Personalization with an AI-enabled CEP



MYTH

You can't do personalized marketing in healthcare because of HIPAA.

REALITY

HIPAA allows personalized outreach when using a HIPAA-compliant platform, obtaining consent, and following strict data governance. An AI-enabled Customer Engagement Platform (CEP) helps healthcare marketers run cross-channel, personalized campaigns while staying compliant. With proper consent, patient data can be used for segmentation and event-based triggers (e.g., appointment reminders, preventive care nudges) without exposing PHI.



MYTH

Email and SMS can't be used for healthcare marketing.

REALITY

An AI-enabled CEP supports HIPAA-compliant communication across email, SMS, and push notifications, with encryption, access controls, and audit trails built in. By obtaining proper consent and using secure channels, healthcare marketers can confidently deliver timely, personalized messages that patients value. These capabilities ensure outreach remains relevant and engaging while protecting sensitive data and maintaining full compliance.



MYTH

Personalization means exposing sensitive health details in messages.

REALITY

An AI-enabled CEP enables smart personalization while minimizing PHI exposure. For example, you can trigger a flu shot reminder to all patients over 65 in a specific ZIP code, or send diabetes management tips to patients who've consented to educational content—without including diagnoses in the message itself. With advanced segmentation and journey orchestration, CEP uses consented data to deliver secure, relevant messages at the right time.

Transform Healthcare Email Marketing with Agentic, Generative and Predictive AI

Healthcare email marketing is moving beyond batch-and-blast. With agentic, generative, and predictive AI, marketing teams can now deliver personalized, timely, and compliant campaigns that improve patient engagement and drive real outcomes.

An AI-enabled customer engagement platform (CEP) empowers healthcare marketers to:

- **Personalize Patient Experiences:** Unify EMRs, CRM, and digital channels to build 360° profiles, then use AI segmentation and predictive analytics to deliver tailored reminders, follow-ups, education, and product recommendations.
- **Engage Patients in Real Time:** Automate 1:1 touchpoints triggered by lifecycle events—missed appointments, medication refills, new program enrollments—delivered at the right time on each patient’s preferred channel across email, SMS, push, and web.
- **Optimize Outcomes and Growth:** Apply AI insights to recommend relevant products and services, enrich healthcare journeys, and continuously improve engagement and ROI by analyzing opens, clicks, and patient actions.
- **Orchestrate Cross-Channel Journeys:** Integrate email with SMS, push notifications, and web experiences to create seamless, consistent patient journeys across multiple touchpoints.
- **Upsell and Cross-Sell:** Apply AI insights to recommend relevant healthcare products, services, and educational content that enrich and support each patient’s healthcare journey.
- **Measure and Optimize:** Continuously analyze campaign performance with AI insights to improve open rates, click-through rates, and patient actions, maximizing marketing ROI.



CONCLUSION

Secure Your Success in the Healthcare Industry

As patient expectations evolve and digital engagement becomes the norm, healthcare marketers must adapt with smarter, more personalized strategies. From orchestrating cross-channel journeys to delivering timely, relevant messages, every interaction matters in building trust and driving better outcomes.

An AI-enabled customer engagement platform (CEP) is essential to scale these efforts. It empowers marketers to deliver proactive, compliant communication tailored to each patient's unique journey—without adding operational complexity.

Blueshift provides healthcare organizations with the tools to unify patient data, personalize outreach at scale, and activate campaigns across every digital channel. Our platform is trusted by leaders like Lane Health, Trulieve, and AMN Healthcare to drive loyalty, satisfaction, and measurable health outcomes.

If you're ready to stop wrestling with disconnected systems, disparate data, and start building better patient journeys, Blueshift is the partner that can help you unify, analyze, and activate your data across every channel—driving retention, loyalty, and improved patient outcomes. No data team necessary.

Schedule a demo today to see how Blueshift can transform your healthcare marketing without requiring more staff.

[Demo Request](#)[See How It Works](#)**ib**blueshift

PLAYBOOK



READINESS ASSESSMENT & CHECKLIST

WORKSHEET

Data Readiness Assessment

Use this worksheet to identify your current state and gaps before CDP implementation, a key part of a CEP.

Data Source	Available? (Y/N)	Quality (1-5)	Integrated? (Y/N)	Weight %	Weighted Score	Notes/Action Items
Website/App Behavior				15%		
Email Engagement				10%		
SMS/Push Engagement				10%		
Call Center Logos				5%		
In-Clinic Visit Data				15%		
EHR/EMR Data				25%		
Billing/Insurance Data				15%		
Social Determinants				5%		
Total				100%		

Instructions

- 1. Mark each data source as available or not.
- 2. Rate the quality (accuracy, completeness, timeliness) from 1 (poor) to 5 (excellent).
- 3. Indicate if it is currently integrated with your other systems.
- 4. Note gaps, issues, or next steps for each area.

Interactive Worksheet

Click the button below to download your own interactive copy of the data readiness assessment.

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CHECKLIST

Key Safeguards in an AI-Enabled CEP for Healthcare

HIPAA-Ready Infrastructure

End-to-end encryption (in transit and at rest), role-based access controls, and detailed audit logs to track data access and changes—designed to meet HIPAA requirements.

Secure Data Unification with Governance

Consolidates data from EHRs, patient portals, contact centers, and digital tools into a single patient profile, with built-in data governance and access policies.

Consent Management Across Channels

Enables capture and enforcement of patient consent across email, SMS, push, and web—automatically updating preferences in real time to support compliant outreach.

Business Associate Agreement (BAA) Support

Offers BAA agreements to formalize responsibilities and ensure adherence to HIPAA standards as a trusted business associate.

HIPAA-Compliant Message Delivery

Ensures all outbound communications—email, SMS, push—are delivered through secure, compliant channels, with instant opt-out and suppression controls.

HIPAA-Compliant Message Delivery

Supports de-identified audience segmentation to enable broader targeting while minimizing exposure to sensitive data.

Ongoing Compliance Audits

Undergoes regular third-party audits and provides tools for real-time monitoring of data usage, access, and campaign compliance.

