

## Help wanted:

A trusted vendor for your marketing and communications strategy who's willing to get in the trenches with you if the moment demands it. A transparent vendor who shuns hidden expenses and cryptic integration fees.

## Help available:

You need a guide to help you sort through the CRMs, intranet and email platform providers so you can select the best one for your needs. We've built the vendor relationships. We've done the due diligence. We've tested the products. All so you don't have to. Over the years, we've developed a step-by-step process for discovering the best vendor partner to keep your Marcom functioning.



## We guide. You decide.

Tech platforms are as much about fit as they are function. That's why we'll never just tell you what to choose. Instead, we'll guide you through these stages to narrow down your options, with the final choice being yours. Our approach is to **Learn, Build** and **Deliver**.



### PERFORM STAKEHOLDER INTERVIEWS

Meet with relevant advancement, finance and operational leaders to outline their expectations of marketing measurement and specific goals associated with e-communications, patient acquisition and online engagement activities.

### ASSESS DIGITAL MATERIALS AND CAPABILITIES

Examine all information related to your digital touchpoints: digital and website analytics, social media performance, consumer app data, listening room intelligence, persona development and more. We'll assess measurement and budget and will inventory current and desired tools and channels.

### CONDUCT INITIAL VENDOR AND TECHNOLOGY RESEARCH

Review and interview vendors to set baseline expectations of what's possible with different types of marketing technology.



#### IDENTIFY GOVERNANCE & SELECTION COMMITTEE

Together, we'll determine: Who are the owners, collaborators and users of the new tech platform(s)? What are the needs and desires of those users? How will the platform be governed by owners? Our plan will include a cross section of those individuals to form the selection and feedback committee.

#### DEFINE GOALS AND PROCESS

Using stakeholder interviews, we'll define the primary goals for the project and for selecting potential vendors and/or solutions. We'll work with the selection committee to measure success, evaluating and refining the selection process as the work progresses.

#### DEVELOP SPECIFICATION DOCUMENT

To engage vendors and guide demos and discussion, we will build a specification document that includes goals, objectives, features and functionalities and user scenarios.

#### DESIGN AN EVALUATION PROCESS

To ensure we meet all expressed needs, we will develop an evaluation process to measure each potential solution.



#### CONDUCT DUE DILIGENCE

We will leverage your experience and insights as well as our own research to narrow the vendor field and begin contacting solutions vendors with a request for information.

#### DETERMINE TOP VENDORS

Let us be the middleman. We will assess each vendor through preliminary conversations. Based on your defined specifications to identify a shortlist that meets your vision, objectives and requirements.

#### EXECUTE VENDOR EVALUATIONS

Using a series of strategic demos that focus on use cases, our specification document and evaluation scorecard, we determine the ideal vendors for your needs.

#### ONBOARD VENDOR(S)

Our team will stand alongside the selection committee and owners of the new solution to ensure a smooth transition and rollout.

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## About Us

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With offices in the healthcare hubs of Nashville and Chicago, Jarrard Phillips Cate & Hancock, Inc. is a U.S. Top 10 strategic communications consulting firm for the nation's leading healthcare providers experiencing significant change, challenge or opportunity. Founded in 2006, the firm specializes in M&A, change management, issue navigation and strategic positioning. Jarrard Inc. is a division of The Chartis Group, one of the nation's leading healthcare advisory and analytics firms.

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