



WellNet<sup>+</sup>  
HEALTHCARE

# *The Marketing*

**B** **U** **R** **N**

**B** **O** **O** **X**

*Second Edition*

## 10+ Memorialized Marketing Tactics

Written by Megan Chiarello,  
Vice President of Marketing

*This is why her hair is so big, it's full of secrets!*

# BEFORE WE BEGIN

“The principles have never changed. Create great products & services because without that, no amount of marketing will ever be able to help.”



# NOTE

**\*Most\*** of anything quoted in this book is from **UnMarketing\*** by Scott Stratten & Allison Kramer.

This edition includes new sources, references & tips from industry contributors - most

\*quotably\* Jeremy Gutsche, ***NY Times***

***Bestselling Author of Create the Future:***

***Tactics for Disruptive Thinking.***



**\*It's the reason I exist.**

# 1

## ESTABLISH EXPERTISE

“When you **position yourself** as an **expert** with useful information for people, **your marketplace will always have a need** for that information.”

**1. Write a Book** – *Many of you have done that, go you!*

**2. Write a Book With Other Experts For Your Target Audience** – Attorneys, financial advisers, corporate trainers, P&C professionals, corporate board members, VC Firms – *anyone who is an expert consultant to a company.*

Gain contributor status & align with established content: industry publications (no-brainer!), CEO networks, calls for contributors & influencer partnerships.

**3. Produce Free, Ungated Content** – This is merely a word to the wise. Don't make someone jump through hoops – they don't care enough. Get them to subscribe/opt-in & then drip ongoing content. Save the form fills for event registration or something substantial.

**4. Start A Topical Series** – Livecasts, a series of eBooks or 'Digital Drops' – *anything that establishes your credibility over time. Topical means hitting on themes or pain points for your clients.*



# “To Inspire Action, You Must Create Urgency.”

This is a **Cardinal Rule** of Marketing

- Shortens the sales cycle
- Improves lead qualification
- Establishes the necessity of your product/service

🍕 “A decade ago, Domino’s Pizza was having a difficult time. Their stock price plummeted almost 85% to \$3. Things were gloomy, but that gave the teams the **freedom to experiment & try all sorts of risky ideas** ...their ideas worked because people were feeling a desperate **urgency to react.**” - *Jeremy Gutsche*

**Translation:** Creating urgency both internally & externally supports marketing. If you’re **not constantly thinking about fresh ideas** - if you don’t have this sense of urgency to constantly establish the necessity of your product/service - how are you going to drive urgency in the market?



# 2

## SHORTEN THE TRUST GAP

For service-based businesses **(you!)**  
the trust gap is much wider.

Decrease the Gap with Access to Real Content 

**1. Host anything with your clients** as the storyteller – as a panelist on a livecast, promo video, industry event, etc.

**2. Share content** that openly calls out the good, bad & ugly. Here are some ways to position content like this:

- How **(Not)** to Rollout a Communication Strategy for Your Employees
- We Completely Changed One Company's Healthcare Strategy – Here's What We Learned
- The CEO-Tested/Employee Approved Strategy to Control Healthcare Costs

**3. Say What You're Not** – How often do brands tell you what they're going to do? Flip it & reverse it by saying what you won't do.



*I don't always talk about myself in third person but when I do, it's about marketing.*

①

Establish trust with a **real-life** series on the 365 benefits experience.

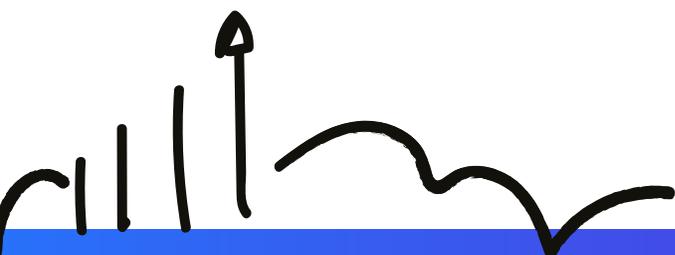
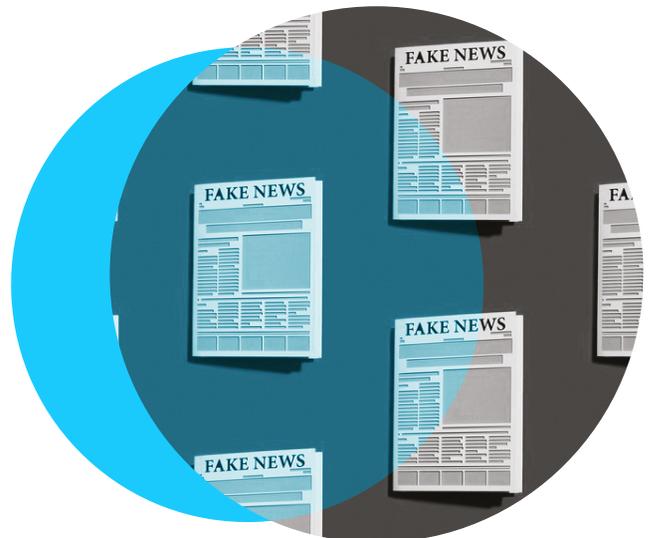
**Feature** your client service team managing ongoing changes, troubleshooting problems, integrating technology solutions, etc.

②

Make you & your brand vulnerable - ***open the kimono to shorten the trust gap.***

**“Simulations** create alignment, optionality & urgency. Everyone wants innovation to happen, but not everyone breaks from the path.”

**-Jeremy Gutsche**



# 3

## LEVERAGE **EVENTS** *In the Post-COVID Era*

“Events are an investment in the community & with regard to the potential for future outcomes, they are not something you can expect an immediate return on.”

Measure your success on awareness – & *there are more ways to do this than ever before.*

**1. Long-Term Play** – It’s not about the actual event; it’s what you can do pre, live & post that has changed. Event attendees are warm engaged leads – as well as advocates/champions of your content. Reconnect with the event replay, a short-list of key takeaways, short survey, best clips or a simple request to *follow* your company page on LinkedIn.

**2. Don’t Make it About You** – Expert & client panels, learning labs, HR & C-Suite influencers, account management sessions, tech spotlights & hot topics.

**3. Build Upon the Access & Demand** – This new world means numerous ways to create urgency & promote access. *Can’t make the event live? Sign up for the live recording. Join us at the virtual after-hours for inside networking with speaker Jim Halpert.*

3

**4. Build Upon the Access & Demand** – Establish validation through better presentations: Bring on a client, industry expert or relevant person as a key panelist/contributor to your event. Host a workshop/deep dive event & include multiple experts related to the many components of your product or solution.

Build manageable tracks to include these presenters & to offer choices for your attendees. Depending on their area of interest or needs, you're casting a wider net for a greater ROI.



Before we **tackle the next tactic**, let's sidebar for a second.

What are we up against with any marketing activity?

## **ACTION LIMITERS\*.**

All we want to do is break through with **CALLS TO ACTION** that generate hand-raisers.

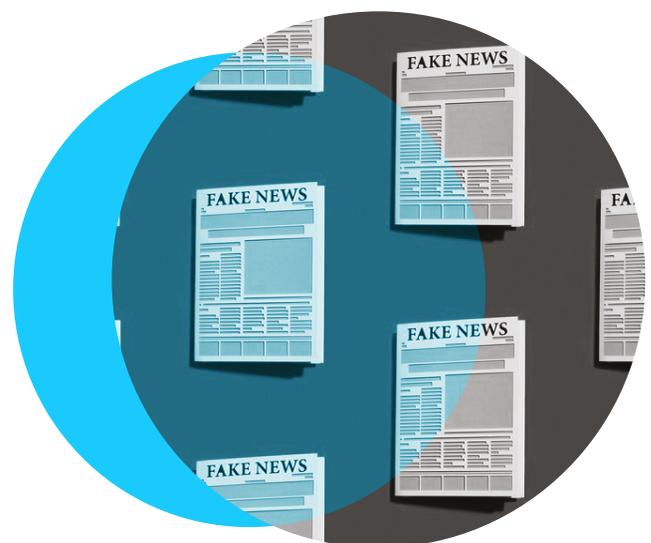
### ***What action limiters are we up against?***

- Structure
- Life
- Busyness
- Optimization
- Neurology
- Constraints

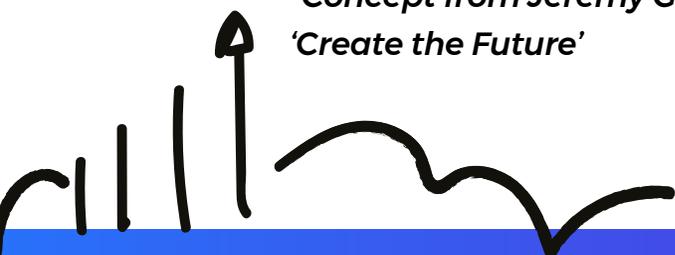
### ***Which ones impact marketing success?***

Life, busyness, constraints & (to some extent) neurology.

***Think about this as we flip to the next page...***



*\*Concept from Jeremy Gutsche in  
'Create the Future'*





4

## APPOINTMENT SETTING 2.0

“People still teach people how to cold call better. That’s like finding a better way to punch someone in the face.”



If you're gonna do it, **REALLY DO IT**.

**1. Lead Score** – Automate your process & trigger call notifications once a lead has some form of engagement.

**2. Multiple Touch Points** – If you send them something, such as an upcoming livecast or training – you have a backup opportunity if they’re not ready to meet. ***Aka - don't let them tell you they can't meet or schedule a call. Have something in your back pocket that's a low-commitment 'yes.'***

**3. Track in CRM** – Pre-schedule an email cadence after the first call with specific calls to action. In between your own pipeline follow ups, any hot lead at a 70% opportunity or higher should receive strategic communications to support a close/win. ***Now you have a steady stream of inbound & outbound activity.***

5

## INFUSE AUTHENTICITY & TRANSPARENCY

“Some people call being authentic ‘personal branding’ but we call it good business.”

*Transparency in marketing is a grey area because it's subjective.*

**1. The Strongest Asset in Your Company** – The first step to infuse authenticity within your brand is to acknowledge that it starts, develops & permeates from you. *Nothing has changed – a company's authenticity has always stemmed from the CEO/owner. Now it's buzzy & there's a big spotlight on it.*

**2. Company & Personal Brand Needs to Gel** – If you preach innovation but your website & graphics say 1999, you'll never compete with the big boxes: [HUB Social Presence](#) | [HUB Branding](#) | [Lockton](#) | Look @ how one shop does it right: [BBG Benefits Group](#).

*“Hi, we're HUB. We advise businesses & individuals on how to reach their goals. When you partner with us, you're at the center of a vast network of risk, insurance, employee benefits, retirement & wealth management specialists that bring clarity to a changing world with tailored solutions & unrelenting advocacy.*

*So you're ready for tomorrow.”*



**3. Find A Voice** – Your written style can be crafted to reflect authenticity. Word choice, voice, etc. all fall into creating a brand that reflects who you are. *“When you stop trying to be like other people & focus on your own strengths, you bring authenticity to the table.”*

**4. Know the Difference** – Transparency means being honest – ethics come into play. Don’t mistake authenticity for transparency. There’s a misconception that being authentic means *saying & sharing - everything & anything* - in the name of maintaining authenticity.

# 6

## BE A BESTSELLER

“There is no better way for an author (or you!) to get clout than to have a best-selling book.”

**2. Better Book Tour** – Launch a virtual book tour/experience where you can host invite-only events & talk about the topics in your book. Use the clips from your book tours as promo teasers/golden nuggets from your book. Team up with other events or piggy-back off partners in your market – *gift attendees a free copy!*

**2. Not Your Mama's Mailer** – Get creative with mailing your book in a shock & awe package. What's a cool pairing for your book – *maybe an online wine membership or whiskey club so they can read & unwind?* Make it about them & create a more intimate, personal experience with your book.

**3. Go All Gordon Ramsey** – Chop your book up into small eBooks based on themes. There's that content series we talked about earlier; *it's done.*

# 7

## CLOSE WITH CONTENT

“Anyone in any type of business can create content around pain.”

○ There's nothing new about how to create good content. It's your delivery vehicle that's had a major upgrade.

**1. First Things First** – Have a monthly content planning meeting with all your key stakeholders; ELT, Account Management leads, Call Center Manager, etc.

**2. Point** – What's the main thing they need to know about your topic/idea/pain

**3. Prove** – This is your case study, success story, example.

**4. Show** – How your prospect can learn from the proof and make it happen.



## BE THE IDEA MAN, CHUCK

“No matter how many new ways exist today to deliver content, it’s the content that matters most.”



*Content is Queen.*

*If you don’t have great content,  
it doesn’t matter how you deliver it.*

### 1. Questions to Make Your Ideas a Reality:

- What are you comfortable with or good at doing?
- How does your market prefer to learn or acquire new information?
- What kind of point are you trying to get across?

**2. Enhance the Old Delivery Methods** – Audio & written content is still cool. *Podcasts, duh?!* You can make an interactive eBook **WITH** your video, hyperlinks, a custom landing page, etc.

**3. Video ROI** – You can’t always measure the ROI from your video content on social. The content play is often the intangible ROI that impacts your business over time. The C-Suite persona is the observer. They don’t always ‘like,’ but they’re watching – & *making their buying decisions based on social influence.*

**4. Stories That Motivate**– Leverage the *Utopia vs. Dystopia* exercise. Get people to imagine the path of a disastrous future (i.e. unaffordable employer healthcare) verses a wonderful future.

The goal is to get your prospect to realize the risk & opportunities facing the company – *feeling the urgent need to change*.

**Get started** – Focus on solving the work with the power of three – **priorities or initiatives** – that offer a solution that’s now **empowering vs. daunting**.



*“Two key outcomes occur: First you start to feel urgency because you realize dystopia happens with inaction. Second, utopia will seem like a lot of work.”*



## Hello, *it's* Conversational Marketing

“Businesses should strive to deliver the right message, at the right time, to the right person, with the right information, on the right channel, every single time.” - *Alicia Collins, The Beginner's Guide to Conversational Marketing*



*Essentially, conversational marketing is the adoption of AI-based communication tools that allow brands to interact with customers & prospects in real-time. What was once an exchange of ideas through traditional marketing materials - or an impersonal customer service experience - is now **conversational**.*

**1. Benefits brands have entered the chat** – In a world where many firms are still finding their digital footing, you can incorporate these concepts for stronger connections with your audience. The goal is to **intuitively understand** our customers' desires & needs.

**2. Isn't this really just direct marketing that studied abroad & won't stop talking about it?** – Here's the difference. This strategy eliminates the campaigns & communication that speak **at** our customers & not **with** them.



**3. Start with purposeful interactions** – You must welcome customers to have a conversation with your brand. It's not enough to say 'Contact us anytime' or 'schedule a quick meeting' - *although we're all guilty of resting on that laurel.*

Design a campaign that sets benchmarks for your industry/type of solution to survey your audience. This effort is not in vain as the data collection should reveal meaningful information for that customer.

Ask for feedback - & then **actually** implement it. You can still adopt conversational marketing with one-way communication.

Host a 'town hall' or a light 'state of the union' where you can invite clients & prospects to see how you've optimized (or modified) product offerings with their needs in mind. Now you want them to see it - & implement **more** feedback for deeper personalization.



# 10

## DON'T SLEEP ON DIRECT MAIL

“What are your market’s core pain emotions or what are its core joy emotions?”

*What is the emotion your potential customers want to feel or what is the emotion they have right now?*



**1. Timely Wins Here** – Mailers should always have an expiration date/deadline so the recipient can take action. What’s the CTA & how soon do they have to take it?

**2. Reinforces Expertise & Shortens Trust Gap** – If you’re sending them something they can use – *a Self-Insured Survey*, the book you wrote, a book you recommend or a collection of success stories in their industry - *you’re already winning on the other tactics*.

**3. Promote the Heck Out of It** – If you launched a mailer, **tell the world!** Promote it on social & ask folks if they were one of the lucky few to receive the mailer? Get a video of an influencer ‘unboxing’ their package.

Pre-promote the mailer - launch a teaser where someone can opt-in & raise their hand to be on the mailer list.



# Tips from Contributors!

To rock this whole 2.0 thing, I enlisted a little help from my friends. In an open call on LinkedIn, I asked my network to share marketing strategies that work.

They all fall into a marketing tactic in the book.

***These are their stories.***

“**ONE:** Embrace LinkedIn. Interact with a prospect’s posts on a regular basis. It’s one thing to “like,” but get used to commenting, too. Express agreement, or sensible (non-aggressive) alternative opinions or disagreement. These are breadcrumbs that show you have ideas & can express them. If the prospect is a total stranger, comment on two or three things they’ve posted. I promise they’ll know who you are when you message them.

**TWO:** Dust off your best articles or blog posts & bring them together in an "Ultimate Guide" hub page (or pillar page). Why? 1) It's a great way to organize the awesome content you've created over time, 2) It's great for SEO to have all those keywords & phrases in one place, & 3) It's a great place to send prospects who want to know more about what you do or your product.

Example: [https://www.freshbenies.com/ultimate\\_guide\\_consumerism\\_tools](https://www.freshbenies.com/ultimate_guide_consumerism_tools)

**THREE:** Do a video series. You know a lot that your ideal prospects need to know. How can you package it in a way that helps them - & coincidentally leads them to your solution? Remember to KISS - keep it short & simple, sweetheart! & for cryin' out loud, be different & entertaining. If you're consistent, your viewers will anxiously await your next installment! ”

Heidi Rasmussen, ***Co-Founder & COO***

**freshbenies**

“The 9-word email Credit to Dean Jackson Adapted by Mark Testa • We use the 9-world email in our direct to consumer & B2B business. • It can be 8-10 words. • It goes out to a stagnant pipeline from two months to a year later. • It can go multiple times during a time period but less than more.

- Figure out how you want the conversation to go/result you want from the email. Begin with the end in mind.
- It asks one question & is never selling. Never go for the sale.
- Make it about what the prospect wants.
- The question embeds the benefit in it.

In your tone, treat everyone like they want to buy. • Example: ***are you still interested in addressing your knee pain?*** • Example: ***are you still interested in reducing your healthcare spending?*** • Example: ***are you...are you still interested in...*** • We get a positive response to this email every time we use it! • Prompt follow up with the CTA you desire is required to get the result you want. We call, schedule a meeting or appointment. It's very simple & works well."

Mark Testa, *EVP*

### **Regenexx**

“People need more FUN in their lives & in their day-to-day work. Entertainment WORKS.

WellNet's Shark Tank, Motion Graphics, Pop Culture references, Costumes/Images not seen day-to-day.

The power of faces – from a neuromarketing standpoint, people love to see faces.

Make a video! Video is almost always a great solution – as long as it is \_ (& not boring or dry). Videos entertain, tell a story, & provide context. Context also dictates the level of polish needed for the video. Magic durations: 30 seconds, 60 seconds, or a 3 minute max.

Long format can be excellent as well – post the entire video on your website & YouTube, then create short video segments to share in bite-size increments on social media.

Create a 30-60 second video invite to invite people to your event.

Promote your upcoming presentation with a video invite.

Share a tip, best practice, or something valuable you learned.

***Ever get a client question that may be frequently asked?*** Or perhaps a prospective client sends a complex question in email, an email response is less than ideal, & you can't get them on the phone – consider recording a short video response & sending the link in your email reply."

## “Noteworthy best practices ...

Customer Journey – marketing & communication points are touchpoints for your audience in their experience with both YOU & YOUR BRAND.

Good, Better, Best – this is a KEY Best Practice in the Marketing Agency world. Knowing when something just needs to be good, versus when it needs to be best possible. Looking at things through the lens of “knowing good communication, what can be better, & what would be the BEST way to communicate an idea to the audience you are trying to reach.

- Be Proactive, not Reactive. Plan with thought & intention. Proactive examples are:
  - Developing a Good, Better, Best marketing plan for the year ahead
  - Identifying audiences, objectives, tactics to apply to meet the objectives, goals & KPIs (key performance metrics) for the business marketing plan
  - Identifying story arcs & priority communication topics/areas that will be primary focuses during the year
  - Identifying promotional opportunities at all phases of events, projects & program
  - Tying everything together & understanding how all your marketing tools & tactics work together in tandem as a whole
- Reactive examples:
  - Posting on the fly, when you think to do so (ok to do this at times, as long as you are not approaching all of your marketing strategy in this way).
  - Announcing an idea to do a podcast without having thought it through (note: would not recommend announcing a podcast until at least 5 episodes are fully produced).
  - A communication or marketing outreach not pre-planned, but rather in response to something, oftentimes not fully thought through or developed.”

Melissa Hassler, *Director of Marketing & Creative Strategist*  
**Health2Business (H2B)**



**Megan Chiarello**  
VP of Marketing  
WellNet Healthcare

*WellNet Healthcare is fixing the unaffordable healthcare mess for companies & their people. We combat vested carrier interests, build smarter self-funded health plans & optimize the employee experience.*

There is no **CTA**.  
Nothing to **buy**.  
Made with **LOVE**.