



# Three Paths to Smarter Marketing, Measurable Growth, and Better Patient Experience

A guide to choosing the right technology approach for clinic's growth goals

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Intense competition in elective healthcare is driving up patient acquisition costs. Complexity of procedures and high technology are further squeezing the margins. Thriving in this competitive space without marketing is nearly impossible. Optimising marketing efficiency has therefore become critical to sustaining growth.

Digital marketing can reach its full potential only when every campaign is tied to revenue it generates. Tracking the full patient journey from first contact to treatment, ensures budgets go to what delivers the best return.

With clinical excellence and technology now expected, the only lasting differentiator is an exceptional patient experience. One that builds trust, generates referrals, and increases perceived value.

Carely patient engagement platform connects to the clinic's electronic health record system (EHR) and website to automate lead capture and conversion, attribute revenue to each marketing activity, and enhance the patient experience through personalised journeys, all within a single GDPR-compliant platform.

While Carely delivers these capabilities in one platform, clinics can also explore other paths to achieve similar outcomes. The following sections outline three alternative approaches, from simple manual setups to complex custom-integrated systems, each with its own advantages, limitations, and considerations.

## LOW-TECH, MANUAL APPROACH

Even without specialized platforms, a small clinic can set up a basic but functional system to capture leads, connect marketing activities to revenue, and create a positive patient experience. This requires combining simple, low-cost tools with disciplined processes.

- 1. Lead Capture** – Use a basic web form (built into the clinic website or Google Forms) to collect inquiries. New leads are logged in a shared Excel or Google Sheet, with fields for contact details, inquiry date, lead source (e.g. Facebook ad, Google search), and follow-up status. This acts as a mini-CRM and ensures every lead is recorded.
- 2. Revenue Attribution** – To link marketing to revenue, capture the lead source at the first contact and keep it in the spreadsheet record. When a lead becomes a patient and completes a treatment, staff update the record with the procedure and revenue generated. This allows manual calculation of ROI for each campaign or channel. Simple techniques like campaign-specific promo codes, dedicated phone numbers, or “How did you hear about us?” questions can help identify the source accurately.
- 3. Fostering Patient Experience** – Plan a series of touchpoints that make patients feel informed and cared for. This might include a personalized email with educational content after an inquiry, a reminder call before an appointment, and a follow-up check-in after treatment. All touchpoints should be scheduled and tracked in the spreadsheet to ensure consistency.

## Considerations

This setup is inexpensive and easy to start, but it is labor-intensive and relies heavily on staff diligence. Marketing insights will be less precise than with automated systems, and scaling the process to higher lead volumes can be challenging. GDPR compliance is entirely the clinic's responsibility. Patient data in spreadsheets or forms must be secured, consent for communications recorded, and any third-party tools configured to meet data protection requirements.

## MID-TECH, MODULAR APPROACH

By combining widely available software tools, a clinic can automate parts of lead management, improve marketing attribution, and deliver a more consistent patient experience, without committing to a single all-in-one platform. While flexible, this setup is not always the cheaper option, as it often requires the expertise of agencies or specialists to configure, integrate, and maintain.

- 1. Lead Capture** – Use a CRM system (such as HubSpot Free CRM, Zoho CRM, or Pipedrive) to store and manage leads. Connect it to website contact forms or dedicated landing pages built with tools like WordPress, Wix, or Unbounce. Proper configuration ensures inquiries flow directly into the CRM, eliminating manual data entry and reducing the risk of missed leads.
- 2. Revenue Attribution** – Record the marketing source automatically when a lead enters the CRM by capturing UTM parameters from ads or tagging form submissions. However, completed treatment and revenue information typically live in the clinic's EHR, not the CRM. To measure ROI, staff must periodically export data from both systems and manually reconcile them in a spreadsheet, linking EHR treatment records to the original marketing source from the CRM. This step, along with configuring UTM tracking, ad platforms, and analytics, often requires professional marketing or technical support.
- 3. Fostering Patient Experience** – Use the CRM's built-in automation or integrate with tools like Mailchimp or ActiveCampaign to send relevant communications: welcome emails, appointment reminders, pre-visit instructions, and post-treatment follow-ups. Online booking tools (Calendly, Microsoft Bookings) can be embedded in emails or the website to make scheduling easy.

## Considerations

This approach can achieve a high level of functionality but typically involves higher ongoing costs in agency fees or specialist hours for campaign setup, tracking configuration, and integration maintenance. While more automated than a purely manual process, it still requires manual reconciliation for full treatment-level revenue attribution. GDPR compliance must be handled individually for each tool, including consent capture, secure data storage, and signed data processing agreements.

## HIGH-TECH, FULLY INTEGRATED CUSTOM SETUP

In this approach, an enterprise-level CRM (such as Salesforce Health Cloud or Microsoft Dynamics 365) is custom-integrated with the clinic's EHR and website. The goal is to create a unified environment where lead capture, revenue attribution, and patient engagement are fully automated and driven by a single data flow. These projects are typically executed by specialized agencies and require significant upfront investment and planning.

- 1. Lead Capture** – All inquiries from website forms, dedicated landing pages, chatbots, and even phone tracking systems feed directly into the CRM, with marketing source data (UTM parameters, campaign IDs) stored at the first contact. From there, the lead record is synchronized with the EHR as soon as an appointment is booked, ensuring clinical staff have immediate visibility.
- 2. Revenue Attribution** – Because the CRM and EHR are linked, treatment and billing information automatically flows back into the CRM, where it is tied to the original campaign source. This enables real-time dashboards showing the exact revenue generated by each campaign or channel, without the manual reconciliation required in low- or mid-tech setups.

- 3. Fostering Patient Experience** – The CRM’s marketing automation engine can deliver highly personalized, multi-channel patient journeys. Messages are triggered by live EHR events (e.g., appointment confirmation, procedure completion, follow-up due date) and can include pre-treatment education, post-care check-ins, satisfaction surveys, and referral requests. This ensures timely, relevant, and consistent engagement at scale

## Considerations

This setup offers the highest level of automation, accuracy, and strategic insight, but it comes with substantial costs and complexity. Successful implementation requires careful requirements gathering, technical planning, and professional integration work. Once running, it delivers seamless data flow, precise ROI tracking, and a premium patient experience, with GDPR compliance managed centrally across all systems.

## CONCLUSION

Private clinics have multiple paths to improve marketing efficiency, link campaigns to revenue, and enhance patient experience. From manual processes to modular tool combinations and fully integrated custom systems, each approach carries its own balance of cost, complexity, and performance. Selecting the right solution depends on a clinic’s growth ambitions, resources, and operational capacity. Platforms like Carely bring these capabilities together in one place, reducing complexity and enabling clinics to focus on what matters most, delivering excellent care while achieving sustainable growth.

