Sales Playbook

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Xtelligent Healthcare Media

**Founded in 2012 Xtelligent Healthcare Media Network connects healthcare executives with the information and insights they need to succeed. The organization started with one website, EHRIntelligence.com and has expanded to eight content channels and two annual conferences.**

Our goal is to help decision-makers better understand the context of their complex, top-of-mind challenges. This is the driving force behind the planning and production of our original editorial content. Professionals in the healthcare industry want to hear from their peers, so it follows that the major focus of our editorial coverage involves engaging these experts and sharing their best practices with our audience. We provide actionable intelligence to our audience of healthcare providers, payers and healthIT decisions makers so they can do their jobs better.

**Editorial Properties:**

Lead by our VP of Content, Kyle Murphy PhD, our Network consists of the following properties:  
Websites:

EHRIntelligence.com editor: Christopher Jason

HealthITSeurity.com senior editor: Jessica Davis

RevCycleIntelligence.com senior editor Jacqui LaPointe

mHealthIntelligence.com senior editor Eric Wicklund

PatientEngagementHIT.com senior editor Sara Heath

HITInfrastructure senior editor Fred Donovan

HealthPayerIntelligence.com lead editor: Kelsey Waddill

HealthITAnalyitics.com assistant editor Emily Sokol

Conferences:

Value Based Care Summit- Oct 24, 25, 2019 Boston MA; October 29-30, 2020 Boston MA

Value Based Care Summit and Telehealth Summit June 3,4, 5, 2020 Austin TX

**Elevator pitch**

Our websites reach over 400,000 unique users and they consume nearly 1m pages of information each month. Our audience consists of senior level healthcare professionals from every aspect of the healthcare ecosystem.

Our live events deliver executive level education to senior healthcare professionals from providers, payers, pharma, life science and med device organizations seeking to navigate the transition from fee for service to value based care.

We have a database of over 300,000 senior level healthcare professionals that we leverage to drive results for our marketing partners.

**Sales Department Mission:**

The goal of the sales team is to drive revenue growth for the organization. We do this through reaching out to technology and service providers targeting the healthcare market. Our goals are two fold:

1. Go deeper and wider with the companies we are currently doing business with by selling multiple products to organizations and finding additional budget holders within the organizations we are currently doing business with.
2. Grow our active account base through effectively engaging new logos and reengaging past clients

We leverage a consultative sales approach seeking to understand our clients current marketing challenges, uncovering their goals and assembling a solution that meets those goals.

Our ultimate goal is to develop deep relationships with our partners to be seen as an extension of their marketing team. When a client thinks about marketing to healthcare we want them to think Xtelligent Healthcare Media

**Sales Organization:**Business Development Representatives:

The engine of the organization, BDRs are aligned with Strategic Account Managers to source and deliver appointments with new prospects. They set up discovery meetings with incoming leads as well as cold calling marketing generated leads, trade show lists, advertisers in competitive publications and editorially sourced leads.

Strategic Account Managers-

Strategic Account Managers handle a defined book of business and are responsible for expanding the revenue opportunities by selling integrated marketing opportunities. They also execute discovery calls sourced by the ISRs and an assigned list of accounts

Client Success Manager

Our client success team is responsible for account management post contract. They are the primary point of contact with our clients post sale. They work directly with the clients to secure the creative elements to fulfill on their campaign. They work with the sales and operations team to trouble shoot any challenges with the execution of the campaign. They provide reporting on campaign elements, provide monthly updates and final campaign reports. They are responsible for making sure the client has a positive experience with XHM.

Sales and Marketing Coordinator

The sales and marketing coordinator manages SalesForce and drives our sales enablement marketing efforts. Working with the CRO they develop and manage our weekly outgoing email marketing, distribute call lists from marketing outreach and enter in all leads into salesforce.

**Our Position in the Market:**

Xtelligent Healthcare Media is a digital publisher focused exclusively on the healthcare segment.  We started in 2012 and have grown to a network of eight  content channels,and two live events serving over 400,000 users a month.

Our editorial strategy is a bit academic in approach. Each of our 8 websites has at least one dedicated editor who is speaking to the market daily.  We provide actionable insight on the challenges healthcare is facing, what they are doing to deal with those problems and what outcomes they are driving.

Our audience footprint has more than doubled in the last year-and-a-half. Readers  find us through longtail search queries.  This is important because they're really coming to us trying to solve problems.  That's our editorial strategy:.  delivering actionable insight around the biggest problem areas in healthcare so that we can help deliver meaningful intelligence to the market.

**Marketing Solutions We Offer:**

Our clients come to us trying to accomplish three goals:

Lead Generation

Thought Leadership

Brand Awareness

Many of our solutions can fall into more then one category.

Lead Generation or cost-per-lead campaigns are the back bone of the company. Clients who have content assets created (white papers, case studies, infographics/executive brief) are good prospects for our lead generation programs. We take their content and market it to our audience. The leads can be filtered to meet a specific profile the client is trying to reach. This program delivers lead generation and thought leadership.

Webcasts are one of our fastest growing segments. Clients come to us to produce a virtual education experience that builds though leadership for their organization as well as lead generation. XHM hosts, produces, and promotes the program to our audience and in our social streams. The client can provide the presentation or work with our editorial team to build out an educational experience for them. This program delivers thought leadership and lead generation.

Eblasts: email list rentals. Clients can rent a full subscriber list or segment the list based on a specific profile they are trying to reach. The client supplies the email and we deploy it to the selected list. The email will drive the responded back to the clients site for further action. This is a flat fee program with no guarantees.

Sponsored Articles: Our sponsored article program allows a client to submit a series of articles for syndication within the editorial streams of our sites. The client can submit articles from their own subject matter experts or partner with our editorial team to build a series of articles for them. The program builds thought leadership for the organization through a content marketing.

Banners: banners on our websites are sold on a cost-per-thousand (CPM) basis. A client can pick from multiple ad units and align their messaging with a specific website(s), run of network, or to specific content themes across the network. This is a brand awareness play.

Newsletters: Newsletter sponsorships are text based ads that run at the top of a specific website newsletter for one week. There is a flat fee for this program. There is a call to action that drives a user back to the sponsors site to take a specific action. Depending on the ad messaging this can drive brand awareness or lead generation.

Custom Content Creation: our editorial team can create white papers, case studies and other thought leadership pieces of vendor-neutral content that a client can use as a basis for their content marketing programs. Programs are priced out in the Custom Content Pitch deck

Research: Working closely with our editorial research director clients can field proprietary research into the market. Programs can be customized to reach specific research objectives or bundled into a content marketing, thought leadership and lead generation strategy. There are turn key programs which are packaged and others are custom quoted based on scope.

Live Events: Our live events offer clients the opportunity to build thought leadership through sponsorships that include presentations within the educational agenda, custom luncheons or dinners with a select group of attendees or table top exhibits that connect them in with the attendees in a meaningful way. These program drive thought leadership and lead generation.

(See Media Kit for Full Product Grid)

**Sales Process- New Prospects-cold outreach/response to incoming leads**

New prospects are identified in a number of ways.

1. Incoming leads- clients that send through a direct request for information from our XtelligentMedia website or from the “advertise with us” link at the bottom of individual sites.
2. Marketing Generated leads- leads that are generated through outbound messaging
3. Advertisers in competitive publications
4. Exhibitors in healthcare trade shows

Incoming leads:   
Incoming leads are assigned in a round robin fashion and should follow a cadence of:

Day 1: Phone call

Intro email

Day 3: Follow email

Day 5: Phone call/VM

Follow up on voicemail

Day 7: Follow email #2

Day 8: Resend follow up email #2

Day 10: Phone call/VM

Follow up on voicemail

Day 12: Follow up email #4

Day 14: Phone call/VM

Follow up on voicemail

Day 16: Break up email

This cadence can be used when soliciting prospects form competitive publications as well.

Once a client engages it is important to qualify them for BANT

Budget- do they have budget allocated

Authority- are we speaking to the right person. What is their role in the decision making process.

Need- do they have need for the product. Are they exploring a new partner.

Timing- when do they anticipate executing on the program.

Log all outreach into Salesforce including follow up tasks and call notes.

Once a meeting is set the lead can be converted to an opportunity and the lead source “ISR Sourced” should be used.

***Salesforce Opportunities – Process Document***

1. Prospect/Qualifying
   1. This Stage should be used as a place holder for future looking renewal opportunities or opportunities that were once qualified and due to a change in timing, budget or initiative were pushed out to a later date and moved back into prospect/qualifying
   2. An opportunity should stay in this stage if the following can’t be identified:
   3. ***Must Have Information to move to next stage. Must answer yes to all***
      1. Are you currently marketing in healthcare?
      2. Are you currently using partners for marketing?
      3. Looking to learn more about partnering?
      4. Targeting healthcare in the future
2. Meeting/Need Assessment
   1. An opportunity should stay in this stage if the following can’t be identified:
   2. ***Must Have Information to move to next stage:***
      1. Is there budget for HC Advertising?
      2. What are the business goals?
      3. Which products meet the clients need
      4. Is there a campaign start date?
      5. Which publications are the target market?
   3. ***Additional Information that is nice to have***
      1. What competitors is the Vendor currently using?
      2. Who is the target audience?
      3. Is there budget for this opportunity?
   4. Please tie a company contact back to the opportunity
3. Capabilities Proposal
   1. An opportunity should move to this stage if all items above have been identified but the client is not sure what specific programs will be a fit. This is an opportunity to showcase our solutions prior to setting a review call to further qualify the campaign.
   2. An opportunity should stay in this stage if the following can’t be identified:
   3. ***Must Have Information to move to next stage:***
      1. Client Budget
      2. Products for Campaign Proposal
      3. Campaign Proposal Review Date
4. Campaign Proposal
   1. An opportunity should move to this stage once a capabilities review has taken place where the Client has had the opportunity to self-select their campaigns to meet their needs.
   2. An opportunity should stay in this stage if the following can’t be identified:
   3. ***Must Have Information to move to next stage:***
      1. Campaign Start Dates
      2. Client Confirmed Budget
   4. Products must be added to the opportunity at this time
5. Negotiation/Follow up
   1. An opportunity should move to this stage once we have finalized the campaign proposal to meet the Clients needs. This is an opportunity to provide additional information or detail to finalize the opportunity.
   2. An opportunity should stay in this stage if the following can’t be identified:
   3. ***Must Have Information to move to next stage:***
      1. Have we identified who will be signing the contract?
      2. Have we identified who will be the billing contact?
      3. Have we identified all decision makers in the buying process?
      4. What is the Contracting Process?
6. IO Sent
   1. An opportunity should move to this stage once the contract has been sent out and all appropriate contract contacts have been identified.
   2. An opportunity should stay in this stage if the following can’t be identified:
   3. ***Must Have Information to move to next stage:***
      1. IO Sent Date
7. Closed – Won/Lost
   1. Won – An opportunity should move to this stage once the contract has been signed by all parties
   2. Lost – An opportunity should move to this stage once Xtelligent Rep has identified why the client will not be moving forward. ***Drop Downs, listed below***
      1. Budget
      2. Timing
      3. Went with Competitor
      4. Poor Performance
      5. Audience Fit
      6. No Longer Targeting HC
      7. Moving Advertising In-House
      8. Other – If Other have a form Fill

**Lead Generation through content syndication.**

The original mission of XHM was to be a lead engine for the healthcare market. Our cost-per-lead (CPL) campaigns are the back bone of the business. Lead generation services can be sold through two programs: Cost-Per-Lead or Unlimited/Unfiltered.

Cost Per Lead (CPL):

Cost per lead campaigns are sold to oroganizations who are looking to reach a specific segment of our database. The clients will select from the following organization types and job functions:

**JOB FUNCTION**

Analyst

Chief Executive/President/Administrator

Clinical Management

CMIO (Chief Medical Informatics Officer)

Consultant/Systems Integrator

CSO

Finance/Accounting

IT Management (Manager IS/IT)

IT Staff

Legal/Regulatory/Compliance

Network Administration

Non IT Staff

Nurse/Nursing Executive

Physician

Privacy Officer

Sales/Marketing

Senior IT Management (CIO/CTO/CSO/VP/Director)

Senior Non-IT Management (CEO/CFO/VP/Dir)

**ORGANIZATION TYPE**

Accountable Care Organization

Ancillary Clinical Service Provider

Federal/State/Municipal Health Agency

Hospital/Medical Center/Multi-Hospital System/IDN

Outpatient Center

Payer/Insurance Company/Managed Care Organization

Pharmaceutical/Biotechnology/Biomedical Company

Physician Practice/Physician Group

Skilled Nursing Facility

Vendor

Once the filters have been identified they are communicated to the VP of Operations for a database count. Once the count is determined a cost per lead and lead count for a 90 day campaign are delivered back to the SAM for communication to the client.

Things to look out for:

Quality of the clients content. Do they have white papers/case studies/briefs or other pieces of vendor neutral content that is targeted specifically to the healthcare market? This is important because the quality and recency of the content will have a direct impact on the performance of the campaign.

The number of assets we can put into syndication. Content will get stale after a few weeks of promotion. Multiple pieces of content are helpful to accelerate the campaign and engage the audience with multiple pieces. It also sheds intelligence back to the client on what issues are most pressing to the market.

Lead flow – how quickly does the client need the leads. All campaigns are quoted on a quarterly or 90 day basis. Will the client take the leads as fast as we can deliver? Should we pace them out evenly over the duration of the 90 day campaign? It is best to know how the client wants the lead volume to flow prior to the campaign going live.

What happens to the leads once they are transferred to the client? Will they go into a database to be nurtured? Will they go directly to sales for follow up? Understanding what the client does with the leads once they hit their system is good to help understand how they will determine success with the program.

Post sale:   
Once the program goes live leads are sent to the client in a spread sheet on Thursdays. After the first set of leads are sent through to the client the sales manager must set a meeting to make sure that 1. The leads are fitting their filters 2. Ensure the client is happy with the quality/process 3. Answer any questions they may have.

Unlimited Lead/Unfiltered lead generation program:

This program, currently in beta, is a flat fee program. The client gives us up to 10 assets to promote. There are no filters to this program. The client receives all leads on Thursdays. The program runs for 90 days. On average a client can expect to receive around 500 leads.

**Webcasts:**Webcasts are virtual education events hosted and promoted on the XHM network. They are one of the fastest growing segments in our product portfolio. There are two options:

1. Vendor webcasts. In this program the client uses our platform to host, promote and produce their webcast. The client provides the speaker and the presentation. We need six weeks of lead time to produce a webcast. There is a minimum guarantee of 125 registrants. We filter vendors, students, professors and consultants.
2. Editorial Webcast. In this program the client works with our editorial team to build out an educational experience. The client receives sponsorship recognition and the full registration and attendee list post event. There is a minimum guarantee of 150 registrants. We filter vendors, students, professors and consultants. It is important to note that the client has no role in the presentation. Once the content direction is signed off on, the client is informed of the industry speaker recruited.

Things to be aware of:

If the client wants to speak, they need to do a vendor webcast. There is no speaker role in an editorial webcast. Due to time constraints we do not allow the client to review the presentation prior to the live event.

**Eblasts:**

Eblasts are email list rentals. Client can choose two options

1. Full subscription list based on media property (Flat fee- see current Ad Rates)
2. Filtered list. The client can choose a targeted list based on the filters identified in the lead generation section.

These programs are limited to one blast per segment per week in order to not exhaust the list. These programs are used to drive vendor hosted webcasts, white paper promotions, special events and product launches.

Sponsored Articles:

The sponsored article program is a