



**HEALTHCARE
MARKETING SUMMIT**

Sponsored by SocialClimb

Navigating Marketing Strategies After a Merger or Acquisition

Andrew Carlson, MBA, MS, ATC

About the Speaker

Andrew, originally from Sturbridge, MA, has a Bachelor of Science from The Pennsylvania State University, Master of Science from The University of Kentucky, and a Master of Business Administration from Midway University. An athletic trainer by trade, Andrew began his career working clinically in the physical therapy & sports medicine specialty, then moved to an administrative position with Bluegrass Orthopaedics in 2016. In 2021, when the national management services organization Growth Orthopedics was developed out of Bluegrass Orthopaedics, Andrew moved into a Director of Growth & Strategy at the MSO. Andrew's passion for the success of private orthopedic practices drives his career. When not working, Andrew enjoys spending time with his family, woodworking, and being outdoors.



Brief Description

In this session, we'll explore the critical role marketing plays in the success of mergers and acquisitions (M&A). Attendees will learn why it's essential to plan marketing integration from the outset, and how to effectively align resources, including PR and marketing agencies, to navigate the complexities of M&A. We'll discuss best practices for ensuring a seamless marketing strategy that supports both internal alignment and external communication during these high-stakes transitions.

Learning Objectives

1

Understand why it is essential to plan marketing integration from the outset of a strategic partnership

2

Understand how to effectively align resources to navigate the complexities of mergers & acquisitions

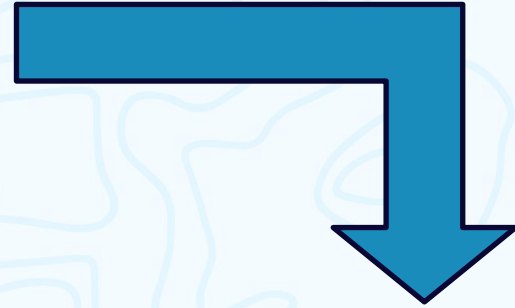
3

Discuss best practices for ensuring a seamless marketing strategy that supports both alignment & communication during high-stakes transition

Case Study



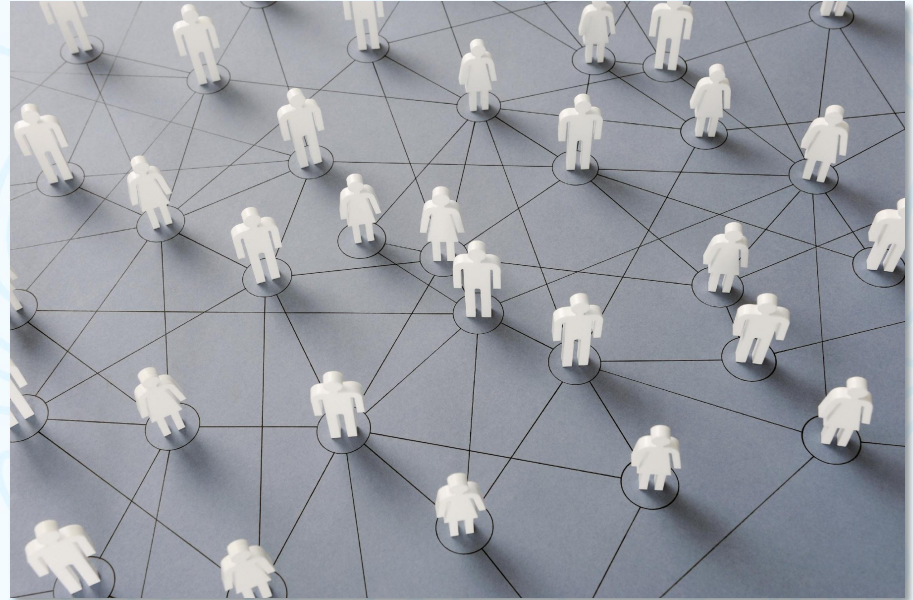
**Spectrum
Orthopaedics**
Spectrum Healthcare Partners



**Orthopaedic
Associates
OF MAINE**

The Critical Role of Marketing in Strategic Partnerships

- **Why marketing matters:**
 - First impressions are lasting
 - Influences internal alignment & external perceptions
 - Bridges the gap between merging cultures and stakeholders
- **Marketing as a strategic partner:**
 - Helps align business goals with patient messaging



The Challenges of Marketing During Strategic Partnerships

- **Integration Complexity:**
 - Different cultures, systems, and workflows
- **Conflicting Brand Identities:**
 - How to merge brand elements effectively
- **Customer Uncertainty:**
 - Maintaining loyalty & trust through the transition
- **Internal Alignment:**
 - Ensuring all teams & leadership are on the same page



The Importance of Early Planning



smartsheet

- **Timing:**
 - Start marketing planning early in the M&A process
- **Communication Strategy:**
 - Define key messaging & positioning from day one
- **Identify Key Stakeholders:**
 - Marketing, PR teams, leadership, and external agencies

Teamwork!

Aligning Internal Teams



- **Collaboration is Key:**
 - Marketing + PR + HR + Sales
 - Aligning leadership across departments
 - Establishing clear roles & responsibilities
- **Internal Communication:**
 - Keep employees informed & engaged (*if possible*)

Leveraging Outside Resources & Partners

- **Choosing the Right Partners:**
 - Expertise in M&A branding & integration
 - Experience in managing communications during periods of change
- **Agency Collaboration:**
 - How partners can support both internal & external messaging
- **External Communications Strategy:**
 - Press releases
 - Website updates
 - Social media campaigns



Creating a Unified Brand Narrative

- **Brand Integration Strategy:**
 - Align logos, messaging, & overall branding
 - Ensure consistency across locations & practices
 - Consider patient perceptions during rebranding
- **The Importance of Storytelling:**
 - Tell a compelling story of why the merger is beneficial *should be about the patient!*



The Name You Know. The Experience You Trust.

Patient Communication During Strategic Partnerships



- **The Patient Journey:**
 - What patients need to know & when
- **Transparency & Trust:**
 - Be open about the changes, the benefits, & what to expect
- **Channels for Patient Communication:**
 - Email newsletters
 - Website updates
 - Direct outreach from marketing & clinical teams

Best Practices

Early & Clear Communication:

- Proactively communicate to all stakeholders

Consistency Across Channels:

- Ensure all messaging is aligned and consistent

Frequent Updates:

- Regularly update employees & customers on progress

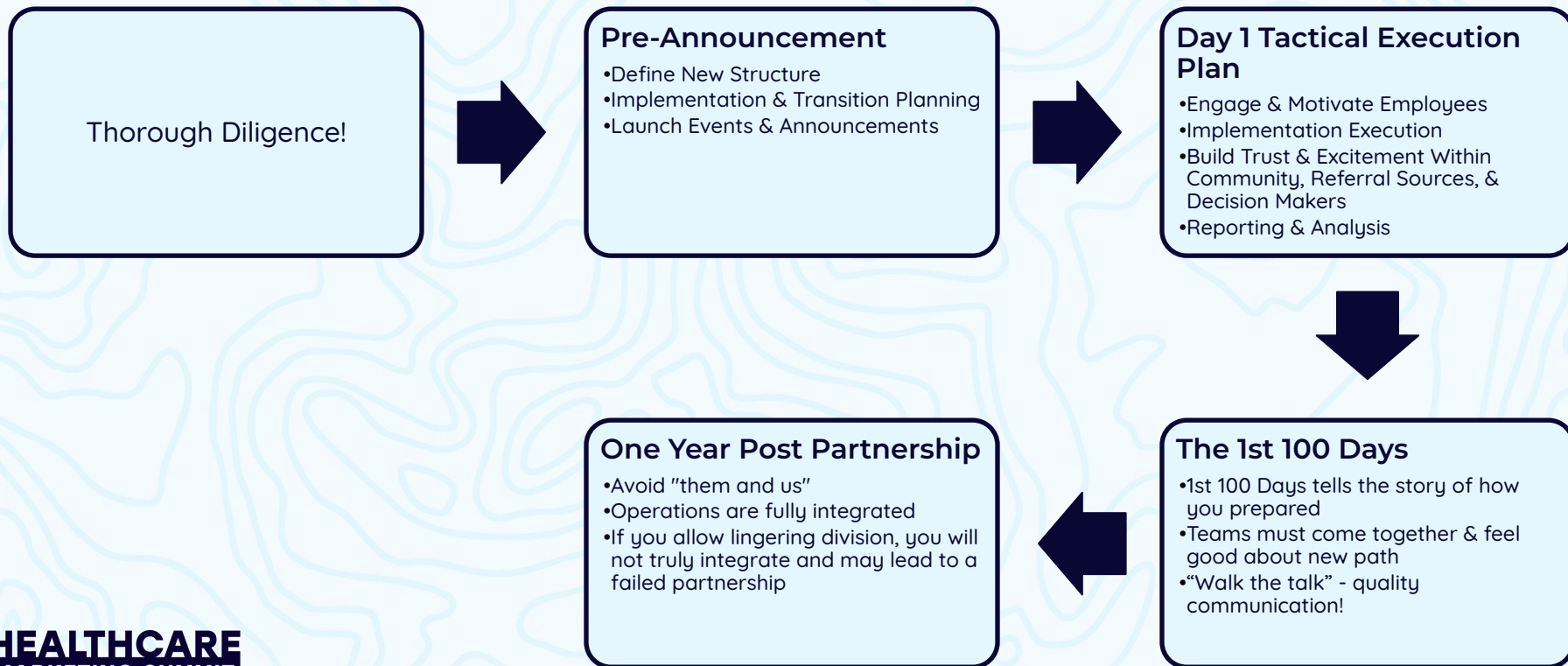
Stakeholder Engagement:

- Involve key stakeholders in the marketing process

Tools, Resources, & Pitfalls to Avoid

- **Marketing Technology & Tools:**
 - CRM and email platforms for consistent messaging
 - Social media monitoring tools to track customer sentiment
- **Agency Support:**
 - Choosing and working with the right partners for rebranding
- **Common Mistakes in M&A Marketing:**
 - Delaying communication until after the merger is complete
 - Ignoring employee sentiment & morale
 - Inconsistent messaging that confuses customers
- **How to Avoid Them:**
 - Start early
 - Be transparent
 - Use feedback to adjust plans

Steps for a Successful Integration



When M&A Falters

- **Cultural Clash**
 - You can guard against culture clash by being clear about the culture you want and using all tools at your disposal to ensure you achieve it.
 - However, don't be afraid to pull the Band-Aid off
- **Loss of Differentiation**
 - Avoid M&A when features/benefits of one practice are not relevant to other practice □ leads to dilution of the brand & competitive disadvantage.
- **Major Distraction**
 - M&A is a resource-intensive endeavor - If not prepared, the team can easily be distracted away from other urgent needs.
- **Community & Referral Network Confusion**
 - Help community understand rationale & benefits of the partnership (*should be about them not you!*)
- **Loss of Brand Strength**
 - If community is confused, your brand will suffer
 - Reputation is what you're known for
 - An ill-timed partnership can quickly diminish the strength of BOTH brands



Hear From the Source...



Questions?

Andrew Carlson, MBA, MS, ATC

Director of Growth & Strategy

Growth Orthopedics

andrew.carlson@growthortho.com

Cell: 859-361-6965

A background featuring a topographic map with contour lines in shades of blue, yellow, and white on a dark blue background. The lines are irregular and wavy, representing terrain elevation. A white rectangular box is centered horizontally across the middle of the image.

THANK YOU!