

The background features a teal-to-blue gradient. In the upper right, there are faint white line-art illustrations of two interlocking gears. A horizontal arrow points from the left gear towards the right gear. A vertical arrow points from the top gear down towards the bottom gear. A curved arrow starts from the right side of the bottom gear and loops back to the left side of the top gear, forming a cycle.

AUTOMATION + EMPATHY TOOLKIT

ab
+a

| advertising

A 10-Point Diagnostic for Health System Marketing Teams

Purpose: To help health systems measure whether their digital marketing ecosystem empowers *connection at scale* or automates *at the expense of human touch*.

Score each statement from **1 (Not at all true)** to **5 (Consistently true)** — then total your points to reveal your “Balance Zone.”

SECTION 1 The Foundation: Systems + Strategy (Automation Power)

1. Automation Alignment

Our marketing automation tools are fully connected across CRM, website, and EMR systems to create seamless journeys for patients.

➔ *Do your tools talk to each other—or just shout in parallel universes?*

2. Trigger Intelligence

Our campaigns trigger personalized responses based on real patient behaviors, not just schedules or static drip sequences.

➔ *Reactive or responsive?*

3. Data + Human Oversight

We routinely audit our automated workflows to ensure accuracy, tone, and ethical compliance.

➔ *Is your AI a sidekick—or a loose cannon?*

4. Measurement Mindset

We measure not only clicks and conversions but also sentiment, satisfaction, and trust indicators.

➔ *Is empathy in your KPI mix?*

5. Continuous Learning Loop

We feed real-time insights back into both automation and staff training to close the human-machine loop.

➔ *Do your bots make your people better?*

SECTION 2 The Experience: Story + Connection (Empathy Power)

6. Human Tone

Automated content reads as if written by someone who genuinely understands the audience’s fears, hopes, and motivations.

➔ *Could your emails wear a stethoscope?*

7. Story Integration

Our campaigns embed real patient or caregiver stories, using automation to deliver them at the right time—not to replace them.

➔ *Is there heart behind the hyperlink?*

8. Accessibility + Inclusion

Automated content is ADA-compliant, bilingual where relevant, and emotionally inclusive of diverse communities.

➔ *Superpower check: does everyone feel seen?*

9. Feedback Channels

Patients and consumers have easy ways to respond, ask, or share feedback—even in automated environments.

➔ *Is empathy in your KPI mix?*

10. Internal Empathy Training

Our marketing and contact center teams are trained to infuse empathy into every digital touchpoint, maintaining consistency between automated and human interactions.

➔ *Do your humans and your tech fight for the same side?*

SCORING:

40–50 points → The Balanced Hero

You’ve mastered automation and empathy. Your systems scale connection, not just communication.

30–39 points → The Transformer

You’re evolving fast—strong systems, growing heart. Prioritize empathy training and tone tuning.

20–29 points → The Technician

Your tech is solid, but your storytelling and human warmth need calibration.

10–19 points → The Robot in the Room

A Field Guide for Infusing Empathy Into Automated Journeys

Purpose: To help health systems design automated campaigns that **connect emotionally, not just efficiently**. This framework turns every digital touchpoint—email, text, portal message, or chatbot—into a moment that *builds trust and strengthens relationships*.

Overview: Automation delivers messages. Empathy delivers meaning. This framework ensures your campaigns do both—*consistently, measurably, and humanly*.

STEP **1** Identify the Moment That Matters

Pinpoint the exact point in the patient journey where automation meets emotion.

Journey Stage	Example Automated Trigger	Emotional Opportunity
Access	“Your appointment is confirmed.”	Ease anxiety with warmth and clarity: <i>“We’re ready for you — and so is your care team.”</i>
Care Delivery	“Here are your discharge instructions.”	Replace transaction with empathy: <i>“You did it — recovery starts here. We’re with you every step.”</i>
Follow-Up	“It’s time for your annual visit.”	Reframe reminder as relationship: <i>“We’d love to see you back — prevention is the best superpower.”</i>
Prevention/Wellness	“Schedule your flu shot.”	Link action to identity: <i>“Protecting your family starts with you — and we’ll make it easy.”</i>

STEP **2** Translate Data Triggers Into Human Themes

Move from metrics to meaning by identifying the **emotional driver** behind each automation.

Data Trigger	Emotional Driver	Narrative Hook
Missed appointment	Fear or overwhelm	“Life gets busy. Let’s get you back on track — we’ve saved your spot.”
New parent enrollment	Hope and vigilance	“Every heartbeat tells a story. Here’s how we help protect yours.”
Billing or coverage update	Confusion or mistrust	“Healthcare costs can be complex — here’s a simple breakdown you can trust.”
Preventive screening reminder	Concern or procrastination	“Your future self will thank you — this one small step matters.”

STEP 3 Build the Empathy Message Matrix

Three layers make the story come alive—**Emotion, Message, and Medium.**

Layer	Question	Example
Emotion	What feeling do we want to evoke?	Relief, reassurance, confidence
Message	What truth connects to that feeling?	“You’re not alone in this process.”
Medium	How can automation best deliver it?	Text for immediacy, email for reflection, video for reassurance

Pro Tip: Pair tone with timing—a warm message sent at the right moment lands like a hug, not spam.

STEP 4 Humanize the Language

Replace sterile phrases with emotionally resonant equivalents.

Cold Automation	Empathetic Rewrite
“Your appointment is scheduled.”	“We’re looking forward to seeing you — and helping you feel your best.”
“Your lab results are ready.”	“Your results are ready — and our team is here to walk through them with you.”
“Your payment is overdue.”	“Looks like something slipped through the cracks — let’s get it sorted together.”
“Survey: rate your visit.”	“Your feedback helps us care better for every child we serve — including yours.”

Words are your superpower — use them to heal, not just inform.

STEP 5 Automate the Story Without Losing the Soul

Design automation that adapts to emotion, not overrides it.

Automation Component	How to Infuse Empathy
Journey logic	Include pause points for human review before sensitive sends.
Dynamic content	Personalize based on care stage, not just CRM data.
Frequency	Respect emotional bandwidth; less is often more.
Testing	A/B test tone, not just subject lines. Measure trust response metrics (open-to-reply ratio, sentiment score).

Automation without empathy is like a hero without purpose — all power, no direction.

STEP 6 Measure What Matters

Move beyond traditional metrics. Track how your stories *make people feel*.

Traditional KPI	Added Empathy KPI
Click-through rate	Sentiment analysis
Conversion rate	Message response quality
Engagement	Trust index over time
Reach	Review volume + tone

STEP 7 Close the Loop

Empathy isn't a campaign — it's a culture.

- ▶ Feed real patient feedback into content updates.
- ▶ Share empathy wins internally to reinforce tone alignment.
- ▶ Celebrate digital + human teams together.

Empathy scales when your people and your platforms fight for the same cause.

LINK TO TOOL 1

Use your Automation + Empathy Scorecard results to prioritize which journeys need humanization first.

- ▶ Low Empathy / High Automation → Apply full Storytelling Framework
- ▶ High Empathy / Low Automation → Identify scale opportunities
- ▶ Balanced Hero → Optimize consistency and tone

SCORING THE STORY

Quick audit: for your last 5 campaigns, rate each on these 3 traits (1–5 scale).

- ▶ Emotionally resonant
- ▶ Ethically designed
- ▶ Consistently human

Average score ≥ 12 ? → You're in the *Hero Zone*.

Below 9? → It's time for an empathy upgrade.

"Great stories don't just move hearts, they move health."

Turning Clicks Into Care

Purpose

Most health-system marketing teams are fluent in automation—but not in relationship.

This playbook bridges that gap.

Relational engagement isn't about more technology; it's about the tone that travels through technology. It's the art of making every automated touchpoint feel as if it came from someone who genuinely sees, knows, and values the person on the other end. When your CRM pings a patient, the goal isn't to prove efficiency—it's to prove empathy at scale.

Automation handles the mechanics. Empathy drives the meaning. Together, they transform “digital outreach” into “digital care.”

The Core Premise

“In every message, there’s a moment to connect. In every connection, a chance to care.”

Marketing is full of noise: appointment reminders, benefit updates, wellness campaigns. Relational engagement quiets that noise by designing messages that answer one central question—why should this moment matter to them right now?

When you treat every interaction as a moment of reassurance rather than a transaction, you earn trust that algorithms alone can't buy.

STEP 1 Know Your Relationship Identity

Every organization carries a relational “signature.” Some brands are the Guides—clear, calm, credible. Others are Guardians—protective and dependable. A few are Champions, infusing every touchpoint with optimism and momentum.

Define yours before you write a single line of automation logic. If your voice isn't clear, your technology will default to generic. The right identity becomes a compass for tone, imagery, and even timing.

When Nicklaus Children's reframed its voice from system-first to family-first, every email, chatbot, and ad shifted tone. The content didn't just inform—it comforted. That's what happens when identity leads design.

STEP 2 Reimagine the Journey

Traditional funnels assume a one-way path: attract, convert, retain.

But healthcare relationships don't move in straight lines—they loop through Connection → Confidence → Care → Continuity.

Connection earns attention by signaling humanity early—warm welcomes, local imagery, genuine introductions.

Confidence builds trust before the visit by clarifying what to expect, who to meet, and why it matters.

Care ensures digital messages mirror bedside empathy—follow-ups that sound like a nurse, not a bot.

Continuity extends the relationship through wellness nudges, gratitude, and storytelling that reminds families they still belong.

Designing around that loop ensures marketing doesn't stop when the visit ends—it evolves as the relationship deepens.

STEP 3 Find Your Cadence

Too many systems equate activity with engagement. The real power lies in rhythm.

Cadence is about timing that feels intuitive: the pause after discharge before the check-in; the gentle nudge before the annual physical; the celebratory note at recovery milestones. It's less about how often and more about how attuned.

Ask three questions before every send:

1. Is this message necessary?
2. Is this the right moment?
3. Does this sound like our best self?

When rhythm replaces repetition, audiences start to anticipate your communication instead of avoiding it.

STEP 4 Engineer Trust Touchpoints

Trust is built in micro-moments. Each one is an opportunity to reinforce safety, respect, and consistency.

Transparency earns belief—be upfront about costs, timing, and expectations.

Accessibility earns loyalty—make it easy for people to respond, reschedule, or ask a question without feeling like they're shouting into the void.

Consistency earns comfort—same tone, same look, same humanity across every channel.

Recognition earns love—thank families for milestones, celebrate progress, or simply acknowledge the courage it takes to seek care.

These aren't marketing niceties; they're emotional contracts that compound over time.

STEP 5 Connect Empathy to Measurement

You can't manage what you refuse to measure. Yet most dashboards still reward clicks over connection.

Add new metrics that reveal emotional resonance: response tone in patient replies, sentiment trends in reviews, completion rates on educational content, or the increase in "thank-you" messages your contact center receives.

These are your Relational KPIs—the signals that show when your marketing is truly being felt. When engagement begins to look less like performance marketing and more like proof of trust, you know you've shifted from counting transactions to cultivating relationships.

STEP 6 Build the System That Sustains Connection

Empathy doesn't scale by chance; it scales by design.

That design rests on four cornerstones:

- ▶ People trained to communicate with empathy and equipped with the context to do it well.
- ▶ Platforms are integrated so the story feels seamless across CRM, EMR, and media.
- ▶ Processes that bake empathy review into automation QA before anything launches.
- ▶ Performance loops that translate data back into human learning.

When these layers operate in harmony, your system becomes a living organism—data-driven, human-powered, always learning.

STEP 7 Train the League

Culture sustains what campaigns start.

Host ten-minute "trust tune-ups" each month. Review messages that earned exceptional feedback. Spotlight the employees whose tone, clarity, or compassion stood out. Encourage teams to rewrite a robotic message into something human and share it.

Small rituals like this keep empathy muscle-memory fresh. Over time, your people—and your technology—will begin to sound indistinguishably aligned.

STEP 8 Keep the Human in the Loop

Automation should extend care, not replace it.

Flag emotionally sensitive triggers—test results, billing notices, bereavement communications—and ensure a real human can review or personalize before the message sends.

Give staff the authority to pause or rewrite an automated message if tone doesn't match the moment. That's not inefficiency; it's integrity. The systems that allow flexibility are the ones patients learn to trust.

STEP 9 Track Relationship Equity

Over time, you'll begin to see patterns—families who rebook, patients who refer, community members who share your content because it feels personal.

That's relationship equity: loyalty that compounds because the experience feels emotionally consistent.

You'll know it's working when your reviews mention trust more than *technology*.

That's the invisible ROI—return on relationship—that keeps growth steady even when budgets tighten.

STEP 10 Activate Your Alliance Plan

The trilogy now completes itself:

- ▶ **Tool 1** diagnoses your current balance between automation and empathy.
- ▶ **Tool 2** shows you how to tell human stories through automated systems.
- ▶ **Tool 3** embeds those principles into culture, cadence, and care so connection becomes continuous.

Together they form your Alliance Plan—a practical roadmap for digital marketing that doesn't just scale communication, but scales compassion.

CLOSING THOUGHT

Every health system can automate.
Only the great ones learn to relate.
The difference isn't the software—it's the soul you put behind it.

*"Automation builds speed. Empathy builds strength.
Together, they build loyalty that lasts."*