

Social Climber

Digital Marketing
Strategies to Help
Medical Practices
Get Ahead



By Mark Harris

The rise of social media over the past two decades is nothing short of dramatic. Consider the fact that in 2005 only 5% of the U.S. public reported using social media.¹ The story today is much different. According to a 2023 Pew Research Center survey, 83% of U.S. adults say they have used YouTube, while 68% report using Facebook and 47% Instagram.² The popular social media platforms WhatsApp, TikTok, LinkedIn, and Snapchat report use ranging from 27% to 35% of the adult population. A reported 20% of adults also use X (formerly Twitter) and Reddit.²

Notably, younger adults are far more likely to use social media than older adults. Instagram users include 78% of the 18–29 age category, compared with only 15% of adults 65 years or older. Younger adults are also far more likely to use multiple social media websites and apps than middle-age or older adults. Despite differences in who uses particular social media platforms (e.g., Instagram and Pinterest are more popular with women),² the overall trend is clear.

Today's social media landscape constitutes a significant and growing social and cultural influence, encompassing everything from personal communication and networking to education and entertainment, business and marketing, and more.

On the Rise

Social media also affects the practice of medicine. For many health care providers, social media is increasingly integral to their public presence and engagement with patients, communities, and peers.

As the leading physician organization in the United States, the American Medical Association (AMA) now regularly engages with the public and physician community through multiple social media sites. These include Instagram, Facebook, LinkedIn, YouTube, X, and TikTok.³ The AMA uses social media to share important health and industry news, address policy issues, support patient health

education, and network with medical colleagues.

The AMA offers a statement on its website:

The Internet has created the ability for medical students and physicians to communicate and share information quickly and to reach millions of people easily. Participating in social networking and other similar opportunities can support physicians' personal expression, enable individual physicians to have a professional presence online, foster collegiality and camaraderie within the profession, [and] provide opportunities to widely disseminate public health messages and other health communication. Social networks, blogs, and other forms of communication online also create new challenges to the patient-physician relationship.⁴

While recognizing social media as a powerful resource, the AMA is also concerned with health care providers using social media platforms responsibly. This includes affirming a strong commitment to safeguard patient rights and privacy while adhering to professional standards. Accordingly, physician practices should understand how to protect patient privacy in every setting and circumstance. As such, the AMA encourages physicians to monitor their internet activities to ensure posted social media content is accurate and appropriate.⁴

With regard for such basic guidelines and considerations, social media platforms offer potential opportunities for health care providers to enhance their online brand and engagement with patients and others. This includes opportunities to more directly and regularly interact with current and prospective patients, support health education, and grow their community connections.

"There are certainly many reasons for medical practices to embrace social media," says Amy Burke, a health care marketing consultant and founder of ABundant Marketing Co. in Kansas City. "First, social media is a free platform. I know most private health care practices are on a pretty tight budget, especially if they're a traditional GP [general practitioner] or family practice physician, and don't usually have a lot of capital to work with. If they want to grow their practice or even maintain their current



“If a practice is at capacity and not really looking to bring on too many new patients, then social media can be a great way to retain your current patients. You can get information out there and just engage more with the patients who already trust you. If your practice is the type that has ancillary products and services, social media can offer opportunities to sell products to your patients. Social media can also be a good way to remind patients that we haven’t seen [them] in a while. I’ve heard practice managers remark on how their annual wellness checks are really down this year. Well, are you reminding patients about those visits? Are you sending something out on social media to jog their memory? Social media is a great outlet for these reminders.”

—Amy Burke

patients, social media can be a great outlet. It doesn’t take a lot, really, other than just some of your time. Depending on what your practice specialty is, you can reach a lot of your demographic through social media.”

Belay That

As a health care marketing expert, Burke is an advisor to small private practices in the health and wellness sectors. While social media use has grown in this sector, Burke recognizes that some practice managers might be reluctant to fully embrace its potential. This can be due to their unfamiliarity with how to effectively use social media for professional purposes and due to concerns about potential violations of patient privacy in online settings.

Concerns over violations of patient privacy are especially understandable. Health care providers must ensure that confidential patient health information is protected at all times, according to the Health Insurance Portability and Accountability Act (HIPAA) of 1996. This means that a patient’s name, address, health condition, or other identifying personal information is legally considered protected health information.⁵

In fact, there have been situations in which medical practices have violated privacy requirements on social media platforms, usually in circumstances such as responding to a patient’s online feedback. The AMA and other groups caution health care providers to remain vigilant about their patients’ privacy rights in every online setting, even private

online group chats, messaging, and other encrypted or restricted digital settings.

Accordingly, the American Health Information Management Association recommends that health care providers and organizations establish clear policies and procedures regarding social media activity.⁶ This includes an advisory for health care employers to establish new-hire and annual all-staff privacy training and education on appropriate social media use.

“Practice managers might worry about their use of social media leading to HIPAA violations or some other compliance issue,” remarks Burke. “I know some managers really struggle with this and that can hold them back from using social media. Now, the practice can certainly put content out there that has nothing to do with patients or patient care directly or any

patient identifiers. But it really doesn’t have to be that challenging. There are parameters we can teach practices about how to use patient testimonials or otherwise engage on their social media pages without violating privacy rules.”

If a medical practice wants to use patient testimonials as part of their public marketing or informational materials, Burke cautions they must first obtain the patient’s written consent. “For written, visual, or audio content, I highly encourage practices to use a patient consent form,” she says. “We often help practices curate what that looks like in terms of the right wording.” Generally, the patient should approve the specific information or details the practice intends to feature in a testimonial or other materials.

Notably, patients are more or less free to say or post what they want on social media sites. What the practice can control is how the practice responds, says Burke: “A patient might self-identify and comment on a post about how they love a particular doctor at the practice. But you don’t want to acknowledge that by writing, ‘Yes, we’re so glad you’re a patient of Dr. Smith,’ or whoever. Instead, you can just respond with a simple ‘thank you,’ or a little emoji or other acknowledgment. But within the acknowledgment you should never actually state that this is [a specific practice’s or physician’s] patient.”

Health care providers do not have to obtain written patient consent for all

Looking Up

With a YouTube channel, physicians and health systems can enhance patient care with informative educational videos on a variety of health topics. One physician who does so is David Thoele, MD, a pediatric cardiologist at Advocate Children’s Hospital in Park Ridge, Illinois. As codirector of the hospital’s Advocate Narrative Medicine Program, Dr. Thoele sponsors the Dr. Dave YouTube channel for patients, providers, and the community.⁹

The channel features health-oriented writing exercises, mindfulness meditations, and testimonials and other contributions from colleagues and participants. Some of the content can support in-office patient instruction, such as simple instructional breathing exercises recommended for mild asthma, anxiety, and musculoskeletal chest pain.

Reach the Summit

Follow these best practices for health care marketing¹⁰:

- Publish educational content to keep patients in the loop.
- Use inspirational content to motivate followers.
- Post infographics for increased engagement.
- Harness the power of health-related hashtags.
- Take your audience behind-the-scenes.
- Publish patient shout-outs to spread positivity.

patient-related communications, such as informing patients about a new product or service offered or treatments or recommendations related to patients' specific conditions or care, according to the U.S. Department of Health and Human Services. But as a rule, a patient should never be identified in marketing materials that will be seen by other patients or the public without their permission.⁷

Overcome Hurdles

Serious concerns about privacy issues are not the only reason medical practices hold back from using social media. "I think that often people just don't know where to start," says Burke. "Or they're afraid their posts are going to get negative comments.

They also might not have a dedicated person for the job, or perhaps don't feel that they have the budget to outsource it. Or they get really stuck on content. They're just not sure what they can post. Is there a HIPAA issue? Are [they] giving medical advice? The lines get blurred, and so they get stuck. What then happens when they get stuck is it gets moved to the back burner. And soon another week or two or a month has gone by, and they've had absolutely no posting."

Instead, Burke emphasizes how import-

ant it is for practices to regularly engage with social media. "You can even post mediocre content, and if you post it consistently, you're going to outperform someone that has spot-on perfect graphics and copy but—because they spend so much time perfecting it—they post only periodically," she remarks. "You have to go in and show that you're really engaging."

In this sense, social media should be viewed as an extension of the practice's marketing and community outreach. "Social media has the bandwidth to push out your content and your brand in front of multiple audiences that might have otherwise never known you existed," explains Burke. "Or perhaps they don't know that you offer a particular service. A family practice may have recently added new services, for example, such as Botox injections for migraines. But if they don't advertise that, how are people supposed to know they now offer that service?"

Social media can also be an effective outlet to promote preventive care services, such as wellness visits and vaccination reminders. "Because our attention span tends to be short, we need short, concise content, and we need a lot of it," remarks Burke. "I think if there is one [initiative] you're trying to double down on, such as to increase your annual wellness visits, you need to be getting that message out in front of your audience seven to 12 times before it's really going to resonate. That's the way people are going to remember and take action to schedule an appointment."

In terms of worries over negative online feedback, Burke says practices should have clarity on both the extent and limits of their social media responsibilities. "First, any business owner should understand that what they share in the digital world is to some extent their intellectual property," she explains. "You own the content; you don't own the platform. You cannot control when somebody leaves a bad Google review or some other negative online comment. But what you can do is address it. Turn it around and use it as a tool. That's my advice for practice managers. If you're constantly seeing some negative feedback about long wait times, for example—people saying they

can't get scheduled—then perhaps that's an internal operational problem you need to look at. If your audience is telling you about some bottleneck in which you cannot move forward with your business and grow, then maybe that's a learning opportunity for you."

View from the Top

Other experts share Burke's view that independent medical practices can particularly benefit from employing a social media strategy and plan.

"Every medical practice—but I think especially the independent practices—need to market themselves," says David J. Zetter, PHR, CHCC, CHCO, CPC, president of Zetter Healthcare Management Consultants in Mechanicsburg, Pennsylvania. "Social media is definitely a good way to do it. You want to build a brand. When I'm working with a new practice, I always go through a start-up checklist and a part of that is determining either a marketing, advertising, or social media plan."

Developing new or more active social media presence will naturally involve effort and commitment. But Zetter, a past president of the National Society of Certified Healthcare Business Consultants, asserts that adopting a new social media strategy for the practice should not be unduly burdensome to managers or staff. The key is to start with a realistic appraisal of the practice's goals and resources.

"You want everything to be consistent—the website, social media, the look, colors, and brand," explains Zetter. "You want to be organized and professional. The practice should also come up with a plan on what they are communicating and why."

The marketing plan will usually include developing a website with related social media channels. "For an independent practice to be successful, you want to find every way possible to communicate directly to your patients, securely, properly, and compliantly," says Zetter. "That means using encrypted email and text and also social media channels with posted content that's appropriate for the practice and what it wants to communicate."

As a management consultant, Zetter often refers physician practices to health care marketing firms equipped to assist with building a professional social media brand. This can enable the practice to create a robust social media presence without overburdening staff, who may not necessarily have the skills or time needed for the project.

These responsibilities should involve planning a monthly social media calendar with a list of upcoming media posts and their publish dates and times, suggests Zetter. The calendar can include information on online links, hashtags, mentions, images, videos, and other details related to the scheduled posts.

"If you want an informative social media calendar, you need someone that knows what they're doing, who knows how to make it look professional and get your message out properly," says Zetter. "If you're a physician or specialist, your specialty is the clinical side of things. You're not a marketer, contractor, or credentialing person. This is why I will often recommend hiring qualified people that you know are going to do a good job."

If necessary, Zetter suggests practice managers network with colleagues or seek out referrals to an appropriate marketing firm. The manager or assigned staff can then brainstorm with their marketing team to clarify and implement its social media communication goals. "You want your social media presence to keep patients engaged and in communication with the practice,

to help them be cognizant and involved in their care," concludes Zetter. "You want to surround yourself with people who have expertise in these fields where the provider and staff don't. That is going to help move the needle to make the practice more successful."

In terms of working with a health care marketing firm, an outside agency can enable medical practices to employ a social media strategy to create a more consistent and professional online brand. However, providers are often unaware of practical options to improve their social media presence.

"Social media is very underutilized by medical practices; most don't do it or they do it ineffectively," adds Justin Knott, CEO of Intrepy Healthcare Marketing in Atlanta, Georgia. For this reason, health care providers might overlook potential benefits. "I think social media is still a very effective way to build an engaged community, as well as [a way] for individual providers and physicians to build thought leadership in their subspecialty," says Knott.

While a marketing agency can handle *all* social media and digital marketing for a medical practice, Knott views a more collaborative effort as the best option. In part, this is because the use of video has become a key component in social media and digital marketing tool kits.

"It's very difficult to do video without a collaborative effort from the practice and

the physicians or providers themselves," says Knott. "While some specialty or subspecialty practices, like plastic surgeons or those willing to spend a lot of money, are able to purchase expensive professional video production services, that's usually out of the realm of possibility for most primary care providers."

Whatever the challenges, Knott encourages physicians and practice managers to embrace social media's potential. "You want to be your own champion on social media," concludes Knott. "As an agency owner, it's one of our services, but the best way to create success is to eventually empower yourself or someone in your office to create and distribute content on social media. Over time this is going to be the most effective return on your investment. It's a way to create a community that will engage potential patients and bring them through the door."

Get a Grip on Public Health

Social media resources can also perform an important role in public health education, such as campaigns to raise public awareness of recommended vaccinations. "We use social media to keep people informed about the importance of vaccination recommendations and keeping patients updated about the COVID-19, measles, RSV [respiratory syncytial virus], and other vaccines," says Brandy Thompson, CMA (AAMA), a clinical supervisor for Cincinnati Health Department Primary Care.

The Cincinnati Health Department plays a leading role promoting human papillomavirus (HPV) vaccination in Hamilton County and the state of Ohio. As the most common sexually transmitted disease in the United States, HPV is associated with increased risk of cervical and throat cancer and other health risks.⁸

"We especially use our social media resources to raise awareness of the HPV vaccine and its importance," says Thompson. "There's a high risk, statistically, in our area, so it's a priority for us to promote awareness about HPV on our social media networks."

Vaccination and other local health

Benefits that Rock

Social media benefits health care initiatives¹¹:

- **Corrects misinformation.** Health professionals can combat the spread of misinformation by sharing evidence-based guidelines and hosting informative Q&A sessions.
- **Informs health research.** Researchers can use online discussions to infer health topics that people want to know more about, and they can recruit research study participants.
- **Influences policy.** Social media can amplify public health policies, serve as an advocacy platform, raise awareness of emerging health concerns, and influence policy changes.
- **Promotes public health initiatives.** Health professionals can promote preventive care screenings and create targeted educational programs for at-risk populations.



Avoid These Slips

Avoid making these mistakes in health care social media marketing¹²:

- Sharing patient stories with identifying information
- Using stigmatized or non-scientific-based language
- Posting unproven claims—instead, be prepared to support any claims with evidence
- Disseminating misleading ads

campaigns are based on Centers for Disease Control and Prevention recommendations, reports Thompson. “For vaccines and other public health issues, I think it’s imperative for our primary care clinics to take advantage of social media,” she concludes. As an area with a large immigrant population, the Cincinnati Health Department provides public health information in multiple languages.

A similar perspective is shared by Nora Clemmens, CMA (AAMA), a certified health coach and lead medical assistant for a primary care clinic serving city employees of Yakima, Washington. “Our social media [e.g., Facebook and Instagram] is done by the city of Yakima,” explains Clemmens. “We organize a community wellness fair at the end of October, for example, and use social media to publicize it with city employees who are our patients. The city’s human resources department is really good about notifying patients about health events, programs, and other issues related to community health.”

As a health care coach, Clemmens says she is particularly sensitive to the need for medical practices to be careful about their social media use and public interactions. “Social media can be both good and bad,” she says. “Some people are so fast these days to post a negative review online that might be out of context or just a personal view. Now, we always strive to provide great service at our clinics, but as we know, we cannot please everybody. Unfortunately, you will have that

occasional patient who is more than happy to post negative feedback. You might have some interaction with a patient who didn’t get antibiotics for a cold or some issue like that, and they’re unhappy about it.”

Clemmens has some advice on how practices can respond to negative feedback: “Avoid any confrontational comments on social media. It’s a bad look for the practice. You don’t want to go online and debate people or say that’s not the way it happened, which can be unprofessional. If there is a problem or complaint someone has made, you should ask the person to discuss it with you in a phone call, rather than on the social media site. I also believe there should be one person in the office who is in charge of the posts.”

An Uphill Challenge

Many health care professionals and medical organizations are concerned about the accuracy of the health information available on popular social media platforms. While social media can potentially facilitate greater public health literacy, it can also be an outlet for false or misleading health claims and information. This is understandable to a degree because major social media platforms are not generally subject to the same review process used by professional news media, let alone the standards of professional medical societies and organizations.

While the topic of health care misinformation is a complex one, health care providers who actively embrace social media and show a strong commitment to accurate, educational, and evidence-based health information can go a long way to help counter the spread of medical misinformation. These responsible social media practices should also include a commitment to adhere to ethical marketing practices.

Social media is now widely used by large hospital and health networks, professional societies, patient advocacy groups, independent physician practices, and individual health care professionals. When used judiciously, health care social media has the potential to enrich patient-provider relationships, promote public health literacy,

and strengthen the health system’s value and connections to communities and society at large. ♦

The CE test for this article can be found on page 28.



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