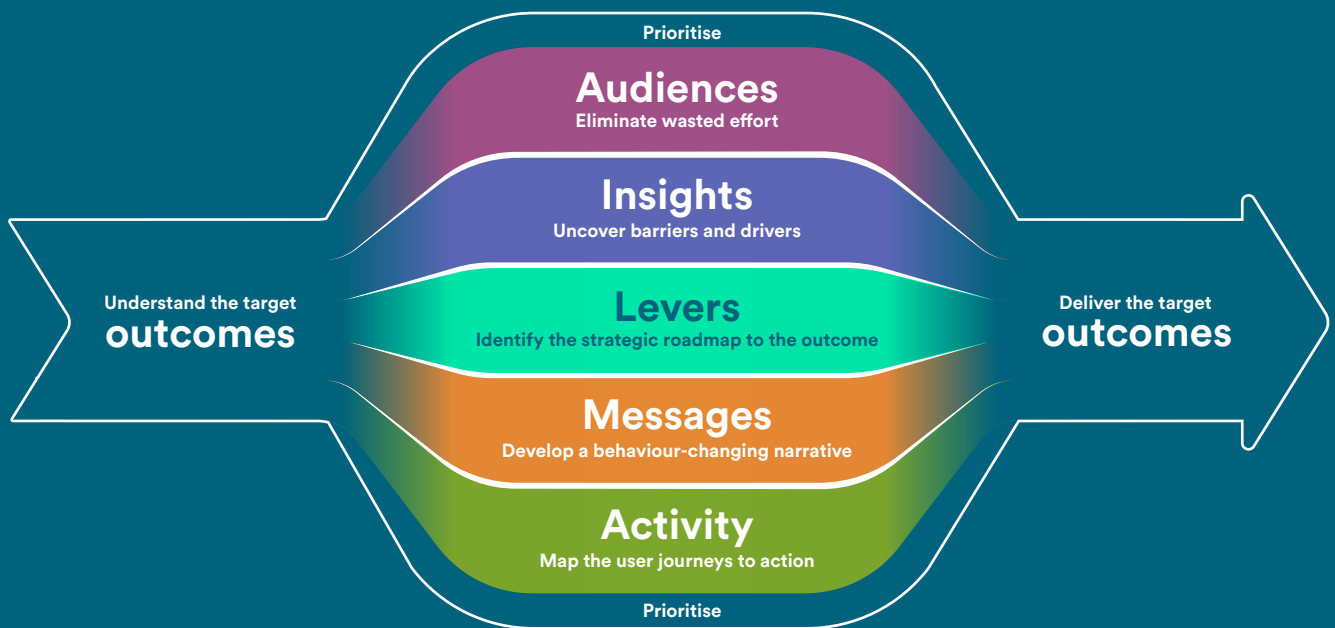


MERTO

the new 'conscious prioritisation' and planning framework that effective health organisations are using to achieve priority outcomes



In a world where the leaders of health organisations **need to be certain** they will make the right decisions, we have identified a significant problem with the way that PR agencies typically approach the challenge of delivering tangible outcomes.

Our insights show that there hasn't been an effective methodology for consciously prioritising the actions that will persuade multiple target audiences to behave in the ways needed to deliver target outcomes. So we created one. And - as the below organisations have already experienced - it works.



We believe that MERTO will change your organisation's fortunes, allowing you to grow your impact and improve the health of even more people.

A simple example of the need for MERTO

An associate of yours, Jonathan, is the Marketing and Communications Director for a private healthcare company that provides services for health insurers and large employers. They have enjoyed significant growth over the last few years but, yesterday, the company's CEO, Jessica, called a Leadership Meeting to address a recent drop in revenue.

As the head of the marketing function, Jonathan is tasked with increasing the number of leads, and the CEO also flags that she saw one of their competitors on a national news website, discussing their latest survey results.

Jonathan has a call with the company's PR agency and they hit on an idea for a survey to identify the regions with the highest rate of sick days. The CEO loves it and urges Jonathan to focus on getting as much press coverage as they can to 'increase awareness'.

Jonathan delivers with aplomb, and the survey story lands in two national online titles and almost 100 regional media. At the next Leadership Meeting, Jonathan proudly displays the results in a digital coverage book, showing that the articles had a reach of "more than 20 million".

His colleagues are impressed, but the CEO... isn't. She charged Jonathan to maximise press coverage but, in reality, she only cared about one number - volume of leads - and that number hasn't changed. She wanted Jonathan to deliver **an outcome** but all she got back was a bunch of **vanity metrics**. She conveniently forgets that it was her who gave Jonathan the steer on the strategy.

MERTO

If you work in communications, then it's likely that at least some elements of this scenario will sound familiar.

It's also possible that you feel that the strategy undertaken by Jonathan was not a bad one. After all, there is good evidence of a tangible link between brand salience and sales.

However, the problem here is one of **prioritisation**, and it happened twice here, right at the beginning of the story.

By jumping straight to a tactic - i.e. generating national press coverage - the planners missed the important step of identifying the company's Priority Audience (in this case the individuals within health insurance companies or major employers that would be responsible for buying their company's product).

This has then caused it to misdiagnose the Priority Activity, aiming it at the wrong audience and offering very little to activate motivational drivers or overcome capability barriers of any members of the target audience who do happen to pick up on their story.



The situation for Jonathan ultimately arose because the focus was on activity and not an outcome. Jonathan didn't have access to a framework to support optimum prioritisation and planning, and the result was ineffective health communications that did not deliver against organisational objectives and led to a significant amount of wasted time and budget.

We have launched MERTO to change this.

Welcome to the new prioritisation and planning model that effective health organisations are using to achieve their priority outcomes.

In the pages that follow, we'll describe how MERTO works, why it works and give examples of real campaigns where it has worked - as well as illustrative fictional campaigns where its use would have prevented poor performance.

If you want to be more certain of reaching your priority outcomes, contact us today.

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Healthcare in the UK - a time of threats and opportunities

The UK health system is in crisis and the NHS is at the centre of it. The issues are vast and multi-faceted and include challenges such as record waiting lists, growth in Long Term Conditions and multimorbidities, staff burnout, staff exodus, poor quality IT and dilapidated estates, among many other things.

Demand for health products and services is rising - but investment is falling

There has been a ninefold increase in the value of the UK's digital health market, after clinicians' use of health technology soared through the pandemic.

The private healthcare market is also growing, with 13% of adults having paid for some form of private medical care in the last year and 23% believing they are likely to do so in the future.

Charities - many of them health charities - are also experiencing a growth in demand for their services and most expect demand to continue through 2023.

You would think this means that the picture for the UK healthcare market is a rosy one, yet the money available for these products and services is reducing.

Investment in UK-based healthtech companies dropped by 37% in 2022 and the HSJ recently reported that NHS England has made significant cuts to its technology budget (though Health Secretary, Steve Barclay, has since committed to protecting NHS tech funding). The UK may be the European healthtech leader but innovation and excellence in this sector may not always translate into revenue.

Similarly for health charities, with six in 10 people reducing their charitable donations over the last six months, the cost of living crisis has led to a so-called ‘cost of giving crisis’ which, coupled with soaring running costs, has left many health charities seriously struggling for money.

Private healthcare companies might appear to be performing well from the outside, but they are currently struggling against staff shortages as well as increased business costs. And, while demand for private healthcare is currently high, it is predicted that the cost of living crisis will have a negative impact on the self-pay market in the future.



Demand for healthcare services is on the rise



But the sector is experiencing financial uncertainty



Those that take the right decisions will enjoy a sustained advantage

We estimate that around 60% of the UK's total healthcare spend goes through the NHS, so when the NHS struggles, many others in the sector can struggle, too.

However, while all of this does present challenges, the rising need for products and services that improve health and the sheer size of the market means there remain very significant financial opportunities for those organisations and individuals who understand how to use prioritisation to grab them.

The increasing importance of insight-driven decisions

People working in healthcare in the UK are experiencing significant stress, and a recent survey found that half of people working in marketing, PR or comms experienced severe stress, anxiety or burnout in the last year. So, for those who cover both i.e. communicators working in healthcare, these are likely to be stressful times.

Behavioural studies and neuroimaging research show that, when making decisions under stress, people typically switch from using their reflective systems that favour analytic reasoning to using their automatic systems that work on intuitive processes. These decisions tend to be less goal-oriented and more habit-driven. As a result, they are often less focused and effective.

The impact of this could be seen in our story about Jonathan, the Marketing and Comms Director in the introduction, and in the reaction of his CEO.

We are in a time of both threat and opportunity for health organisations. For health leaders and communicators - and the patients they help - the stakes are high.

In these uncertain times, those that take the optimum actions now can see instant returns and sustained advantage. We believe they will emerge as the future leaders of tomorrow.



Do you have a prioritisation problem?

Diane is the Communications Director for a charity that is campaigning for more funding for research into an illness that usually develops in childhood.

Her charity has worked with leading academics from the field to develop a 'research manifesto' for studies that would transform the outlook for children who experience this illness.

Diane is an experienced communicator and she develops a smart integrated strategy based around a media relations campaign, public affairs activity and digital and social media content creation.

She shares the plan with her team and assigns roles and responsibilities. There is a lot of work to be done and the team will need to be focused to meet all of the requirements.

One day, there is a 'sliding doors moment'. As part of her research, Diane had identified that there was a particular MP who had this illness himself and who had spoken at length in Parliament about how it impacted him growing up. The MP, who was known as an impressive operator, would be the ideal MP advocate for the campaign - but there had been no answer to last week's phone call by the charity's Comms Officer, Joseph, and no response to his email either.

MERTO

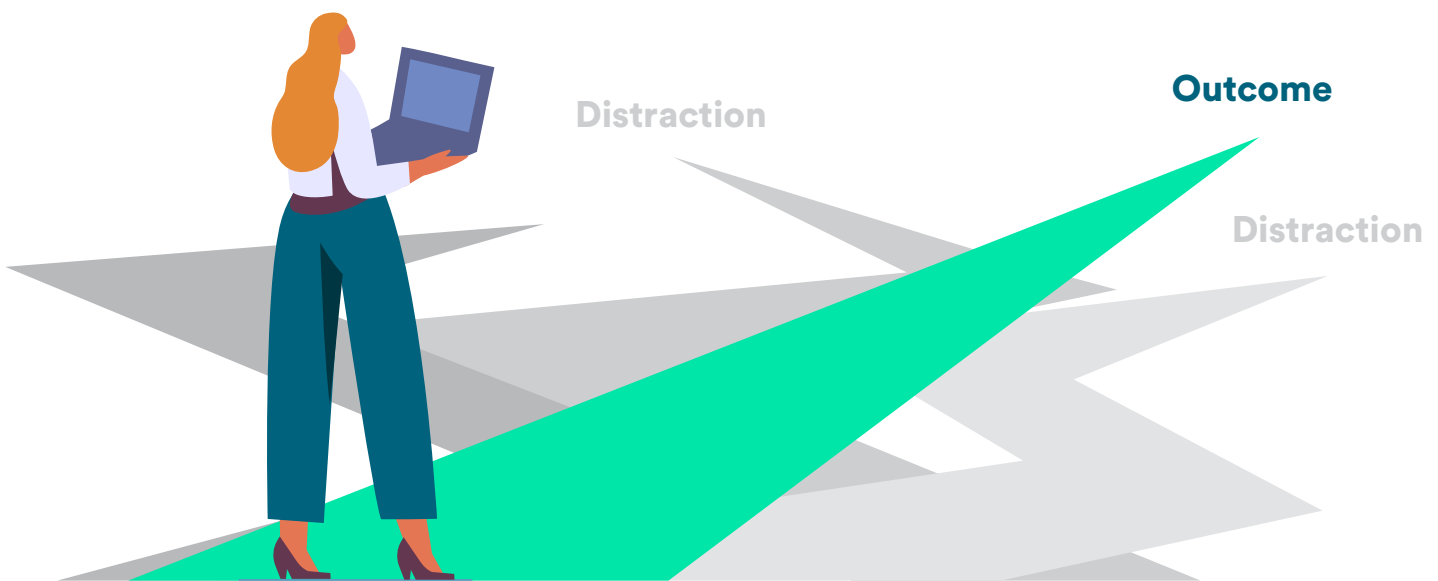
Joseph was feeling the pressure. He had also been assigned a meaty content planning task that was going to take most of the day and, having already tried twice to contact their first choice MP, he moved on to their second choice - a local MP, who Joseph already had a relationship with.

The local MP was always willing to support her local charity and so put her name to the campaign and happily sponsored an event at the House of Commons - an event that a number of people attended. The campaign generated some press coverage and there was a significant uptick in social media engagement thanks to the high quality content created by Joseph.

However, while initially at least, this gave the illusion of success, ultimately, the campaign failed in its objective of generating more funding for research and no outcome was achieved.

Now imagine this same scenario if Joseph had been aware - truly aware - that securing the support of the MP with personal experience of this condition was a 'sliding doors moment' for the campaign and that it would change the trajectory of everything that followed.

If Joseph had been given access to a crystal ball and could see the organisation's first choice MP in action, raising the issue passionately in parliament, securing personal meetings with the Health Secretary to discuss it in more detail, returning to it again and again as an issue of public importance, would he have been so quick to move on to contacting the second choice MP and freeing up his time to concentrate on content creation? Or would he instead have done everything in his power to secure that MP's support, focusing his time and energy on using the key levers at his disposal to get him onboard? Surely, it would have been the latter.



So much to do - but are people seeing the outcomes their efforts deserve?

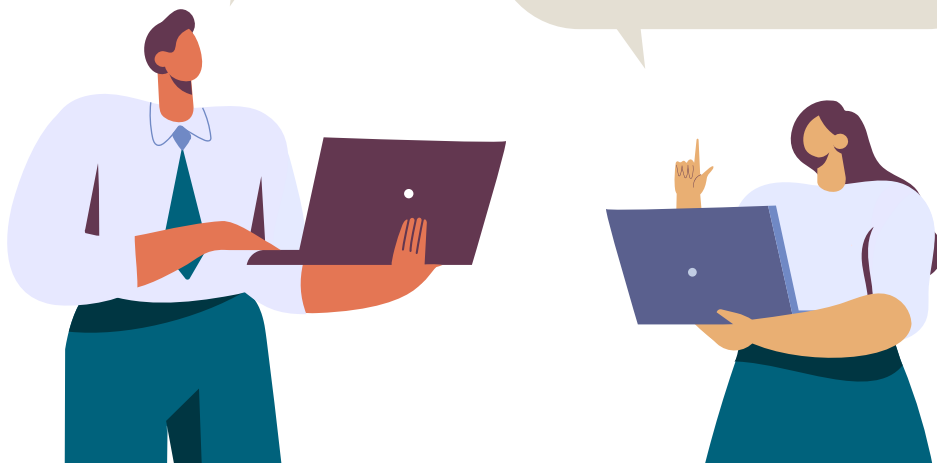
One of the biggest reasons Priority Moments and pivotal milestones are overlooked is that we just feel so busy. The remit of Public Relations and Marketing has exploded in recent years, and professional communicators are spreading themselves increasingly thinly, trying to incorporate an ever-growing list of channels and activities into their function.

However, as AMEC rightly states: “activity without meaningful outcomes is irrelevant.” Once we acknowledge this, it can change our whole mindset.

In marketing and communications offices across the world, people like Diane and Joseph are working extremely hard but, because their effort is focused on what has been characterised as “SOS... Sending Out Stuff”, rather than directly on the organisational goal, they and their chief executives are often left with a nagging feeling that they aren’t seeing the impact their hard work deserves.

What a productive afternoon - a full month of social content created

Fine, but the MP whose support we need doesn't even follow us, Joseph!



MERTO

Recognition of the importance of linking communications activity to organisational outcomes has been around since at least the 1990s, when Jim McNamara differentiated between inputs, outputs and results, while the Barcelona Principles, established in 2010 and strengthened every five years, make the case for outcomes over outputs stronger with each iteration.

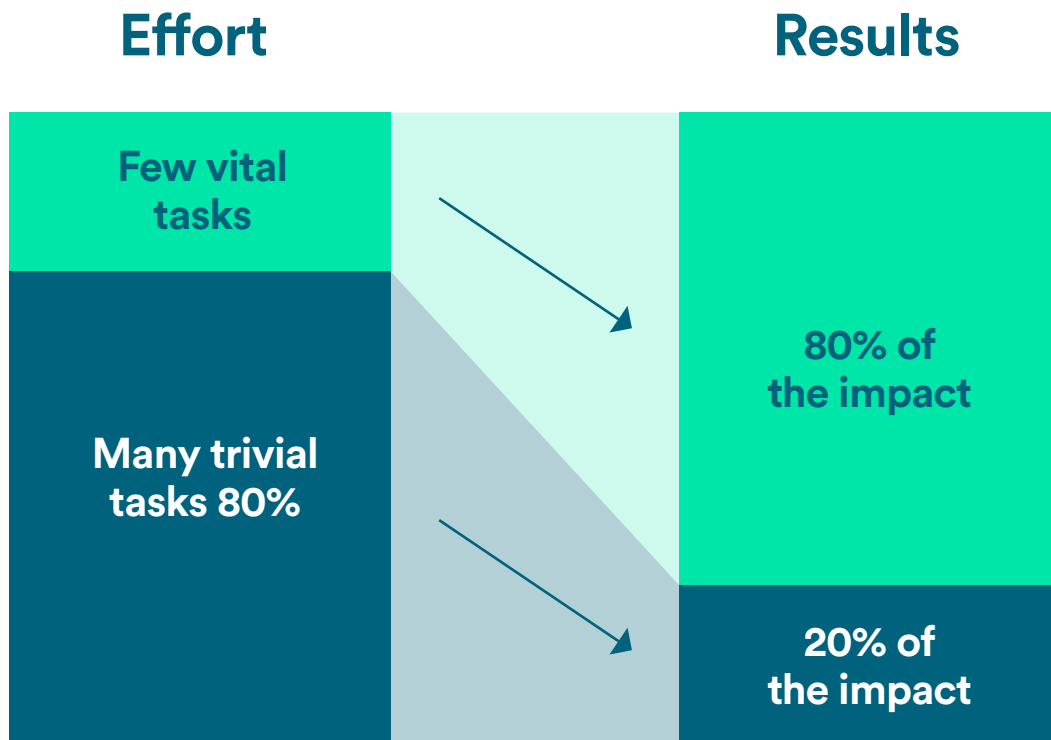
Yet a PRCA Census found that more than one in four practitioners (26%) don't even evaluate their work, and, of those that do, 'impressions' (an output) is the most popular metric. Add to that an analysis of national PR industry award entries, conducted by Evergreen and presented at a CIPR Webinar, which showed that only 32% of nationally shortlisted award entries described a tangible campaign outcome.

Put these insights together and the picture that emerges is one of an industry that is 'working hard' but not delivering (or demonstrating) organisational impact.

Against this challenging economic backdrop, when budgets and time must be used as effectively and efficiently as possible, this needs to change. We need to focus on prioritisation.

| Identifying the priorities

The Pareto Principle - also known as the 80/20 rule - establishes that, in many cases, around 80% of the consequences are produced by 20% of the causes.



It's been successfully applied to many areas and it's true of marketing and communications activity too, as there will always be specific audiences, insights, messages and levers with more potential to impact the outcome than others. The key to success is to identify the 'vital few' and to prioritise those over the 'trivial many'.

In our example above, if Joseph had identified that gaining the support of the first choice MP would be among the vital few activities that would deliver around 80% of the total impact of the campaign, it would have had a transformational impact on his approach. He'd have focused more energy on securing the first choice MP's support, while, similarly, had Diane been more 'conscious' of the importance of securing the right MP, she may have identified other high-power options, ensuring that there was a 'next best' target that was based on the cause rather than subconsciously encouraging the 'easy option' of relying on existing relationships.

Do you have a behavioural (science) problem?

Carol is a Marketing Director for a company that has developed new technology to help nurses complete a frequent task more safely, more quickly and more cheaply. Given the capacity challenges in the NHS right now, Carol is confident she can drive adoption of the product - as long as she can get it in front of the right people.

The main users of the product will be specialist nurses and so Carol develops a campaign to increase awareness among nurses, through media activity aimed at the nursing press and an online educational event for specialist nurses.

The campaign is successful in its goal of generating awareness among its 'target market'. The press story gains media cut-through and a number of nurses attend an educational webinar, describing how the product works.

Carol is congratulated by her team and colleagues for a job well done. However, fast forward a year and the company is still searching for its first customer. Why?

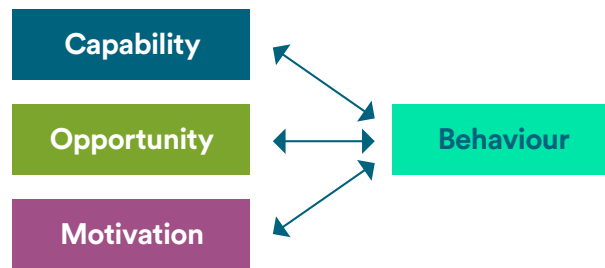
The reason that Carol's campaign ultimately failed is because she took an activity-focused approach, rather than a behavioural approach.

Carol assumed that as long as she got the attention of nurses and gave them the information they needed, the sales would take care of themselves.

However, human beings just aren't like that.

Behaviour Change Communications in action

Let's use the excellent COM-B Behaviour Change Framework to inform Carol's thinking:



- **Capability** - A capability barrier analysis might have shown Carol that, while many of the specialist nurses are true experts in their subject, very few have been involved in a procurement process before, which could leave them unsure of how to approach it.
- **Opportunity** - An analysis of opportunity barriers may have identified that, while specialist nurses agree that the company's technology sounds incredibly useful, they are not the only ones involved in the decision, there are also various committees and organisational leaders that would need to be convinced. A user journey map would have enabled Carol to identify all of the key audiences and how they interact in the process of making procurement decisions.
- **Motivation** - A consideration of motivational barriers may have identified that while the specialist nurses could objectively see the benefits of the technology, 'loss aversion' (people are more influenced by what they stand to lose than what they stand to gain) meant that they feared replacing the flawed but familiar technology they currently use, for something that is still unknown to them.

MERTO

Armed with those three insights, Carol might have developed a very different campaign. For example, she may have:

- Produced a procurement 101 document that supported nurses to understand how new technology is selected by the NHS (addressing capability barriers)
- Created a suite of information materials, with messaging tailored towards the various committees likely to be involved in the final decision (increasing motivation to change among all of those involved in the choice process, not just nurses)
- Made a tweak to the offer, allowing interested specialist nurses to ‘pilot’ the product for a short period alongside their existing technology. This would remove the impact of their loss aversion-driven fear and also encourage reciprocity and liking, which are known to be core drivers of persuasion and influence.

It is likely that this version of Carol’s campaign would have been more successful, since it would have used behavioural science to identify and prioritise the barriers to purchase, energising the various audiences to take action and ensuring they understood what to do.



Expert communicators have a vital role to play

There are a myriad of definitions of PR and Marketing, with various professional associations and academics having defined their particular discipline as being centred around relationships, mutual understanding, reputation and satisfying customers' needs. The one thing these definitions have in common is their focus on human elements.

To change behaviours we need to understand people in their fullest sense, otherwise we are in danger of wasting effort on activity that will not drive people to act.

By thinking of communications in this way, and prioritising the right things, health organisations can be much more effective and efficient when it comes to driving action.

Introducing MERTO - the 'Conscious Prioritisation' Framework for Achieving Business and Health Outcomes

The seeds of the MERTO Framework © were sown in late 2021 when we began analysing how, in our first year of trading, we'd driven a string of impressive outcomes, including gaining government buy-in to a health charity's research manifesto, securing a £1.8m memorandum of understanding (MOU) for a health tech start-up and landing 10 new lucrative clients for a private healthcare firm to drive significant growth in a tough market.

In each case we had identified a priority - a priority person, a priority message, a priority moment - and had focused our energy and resources on that, knowing it would define whether or not we were successful. In each case we were.

Most people prioritise of course, but it dawned on us that, for many, priorities can ebb and flow. They often become less crystallised over time, and they can reduce in perceived importance when we are busy and have many tasks competing for our attention. The significance of priorities can also be easily lost as work is delegated to teams or partners are asked to support.

But retaining a clear focus on priorities is vital to achieving outcomes.

If there was one thing we could do at Evergreen to ensure continued success in delivering impact for organisations that improve people’s health, it would be to make effective prioritisation central to what we do.

That’s where MERTO comes in.

Based on our principle of ‘conscious prioritisation’, MERTO stands for ‘most effective route to outcomes’ and provides a framework for driving tangible change. A focus on prioritisation is inbuilt at every stage of the MERTO process to enable us to uncover the priority audiences, messages, channels, moments, milestones and audience actions that will, ultimately, dictate whether or not the outcome is achieved.

We believe it is the world’s first ‘Conscious Prioritisation’ Framework for Achieving Business and Health Outcomes.



MERTO

We began introducing clients to the concept of MERTO 12 months ago. The feedback has blown us away. Clients tell us that they love the clarity and focus that the MERTO method provides but, more than that, they love that it leads to them achieving their priority outcomes.

So, what kind of outcomes has MERTO driven? Over the last 12 months they include:



Making the prospect of a Tinnitus Biobank real by **driving 3,500 people to sign-up to the project in one week, and securing funding conversations with a number of key research funders**



Getting veterans the healthcare support they deserve by **driving a 645% increase in sign-ups to the Veteran Friendly GP Practice accreditation programme**



Persuading NHS Integrated Care Boards to introduce new technology so they can manage referrals to the NHS Diabetes Prevention Programme at a regional level



Making at-home eye care more widely available by **driving a 76% increase in direct applications for domiciliary optometrist roles, achieving significant recruitment savings**

MERTO

We have tested, iterated and improved the framework over this time - and campaigns developed using MERTO have so far won 15 industry awards in 12 months, including UK Public Health Campaign of the Year from PR Week, the UK's Best Long Term Campaign at the CIPR Excellence Awards and Healthcare Campaign of the Year from PR Moment. Now, having proven the model, we are rolling it out to the wider health market as a standalone, value-creating service that provides certainty of ROI, delivering priority outcomes in the most effective and efficient way possible.

| Our clients love MERTO

Here's what they have to say:

“The introduction of their MERTO Framework has allowed us to systematically identify our key stakeholder audiences, understand the way that they work and adapt our engagement approach to deliver the best results - the impact has been big upticks in engagement and the delivery of positive organisational outcomes.”



Andy Riley,
Head of Programmes and Projects, the Royal College of GPs

“MERTO has helped us to focus on what matters and to cut out those things that aren’t helping us to achieve our outcomes. The Evergreen team have been able to consume an impressive amount of detail to understand our business and the external landscape, encouraging us to invest our budget only in those things that will deliver real value.”



Laura Marlow,
External Communications Lead, Ascenti

"The support and expertise offered by Evergreen PR using their MERTO Framework has been really invaluable. They moved us forward and we would not have got to where we did without their input."



Mike Woodhead,
Director of Contracting, Financing and Estates, Bradford NHS

“The MERTO ensured that our activity had an excellent strategic foundation, prioritising the things that would make the biggest difference to our goals. We enjoyed the process, which prompted open dialogue and it gave us confidence that Evergreen PR understood our business and would be representing us excellently with journalists and other stakeholders - which they have! I would strongly recommend Evergreen.”



Nick Wright,
Marketing Director, OutsideClinic

Before working with us, some organisations have asked us whether we think MERTO requires too much up-front thinking.

Our answer to that is to quote Abraham Lincoln: "If I only had an hour to chop down a tree, I would spend the first 45 minutes sharpening my axe."

That's what MERTO does. All the upfront thinking means our axe is super sharp when we go into action on your behalf because we have identified the smartest way to deliver the outputs or outcomes you are seeking.

As you can see, those organisations that have worked with us love the approach. We think you will too.

Step 1 - Truly understand the outcome - crystallises focus on the goal

MERTO has been designed to drive tangible business outcomes. To do that effectively, we need to understand three things:

- 1 What is the tangible business outcome that the organisation wishes to achieve?
- 2 What is the wider strategic intent of this target outcome i.e. what will achieving it do for the organisation?
- 3 Where is the organisation now in relation to the target goal i.e. how big is the jump from A to B?



These three questions feel obvious to us, however, our clients tell us that their previous PR agencies have only ever paid lip service to achieving business objectives.

Instead, many PR agencies jump straight to outputs like how much press coverage they will generate or, worse still, focus only on inputs like how many hours they will spend creating social media content.

This is a big mistake because it encourages a focus on the wrong things.

As we have established, activity without meaningful outcomes is a waste of time, energy and budget - so **why would any right thinking organisation want to work with an agency that focuses on the activity ahead of the outcome?**



The first priority when planning communications campaigns should be on truly understanding the target outcome, what it means and how hard it will be to get there - so that targets for inputs and outputs have real meaning.

If we do that then we can build a data-driven evaluation framework that gives us certainty that if we hit our priority output targets, we will achieve the target business objective.

Case Study

Late last year we began working with an interesting clinical technology business.



They told us that they wanted to generate press coverage to raise awareness of a new service they were launching that would help make the NHS more efficient.

However, upon interrogating the wider strategic intent behind this, it became apparent that what they really wanted was to drive sales of their new service, which would improve health outcomes by freeing up capacity for clinicians.

This deeper understanding of the target outcome changed the whole structure of the campaign.

Case Study (continued)

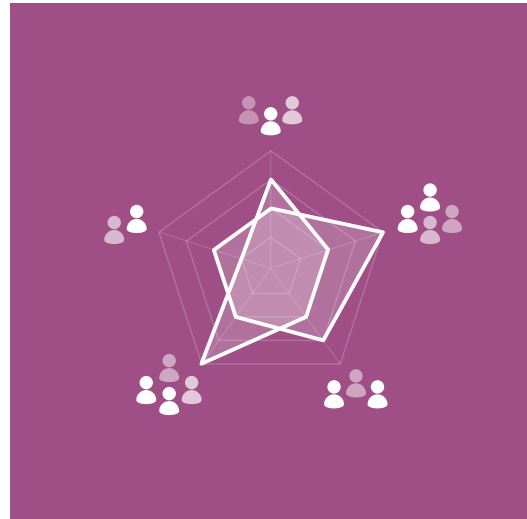
Rather than delivering media relations activity in isolation, as had been requested, our MERTO Framework showed that the way to achieve sales would be to deliver an integrated campaign that complemented media relations work with educational and action-driving activity further down the funnel.

The campaign was successful across every metric - including, ultimately, driving revenue - and the client, who originally approached us about a project, is now retained. Their Financial Director even thanked us for our work.

Step 2 - Prioritise the audiences - eliminate wasted effort

For any outcome to be achieved we need to persuade specific audiences to take specific actions. So identifying and understanding those audiences is crucial.

We have developed a method called Audience ID and Power Scoring © to efficiently prioritise audiences based on who has the most power and potential to help us to achieve a particular outcome.



It enables us to:

- 1 Identify all of the individuals and organisations who are involved - or should be - in the action we want to drive
- 2 Outline their role in the behaviour and their level of Power and Interest over the action we are trying to deliver
- 3 Provide you with actionable insights on the individuals, organisations and experts you should prioritise and why

Our partners tell us that this additional step of identifying and prioritising audiences has been revolutionary for them and completely different to how their past PR agencies approached work.

We think it is 'uncommon sense'.

By identifying the audience and their level of power and interest, we can be more precise in our focus, prioritising those audiences with the greatest potential to influence the outcome.

The alternative, of broad brush communications that targets multiple audiences is imprecise, making it far less likely to deliver an outcome and far more likely to result in wasted time, effort and budget.

This is the second step of the MERTO Framework but is also available separately as a standalone service for those organisations who require support in reviewing the effectiveness and efficiency of their current focus, and where the biggest opportunities might sit.

Case Study

645% growth in Veteran Friendly GP Practices, giving more veterans access to the healthcare they deserve

The impact of service isn't always obvious

Be a champion for veterans and families. Veteran Friendly Accreditation helps you identify, support and refer patients for the best outcomes. Sign up for free.



We recently supported the Royal College of GPs to drive a 645% increase in the number of GP practices getting 'Veteran Friendly' accredited.

We believe that the most important element of this campaign was the identification of the priority audiences.

As a professional membership organisation, it is natural that communications from the RCGP had - before commissioning Evergreen - focused primarily on GPs.

However, working together with the College, our Audience ID and Power Scoring uncovered that GPs actually comprised just 26% of the workforce and, added to that, they remained under intense pressure post-Covid.

Case Study (continued)

We identified that we needed to broaden the focus of communications activity to also target Practice Managers, Practice Nurses and other primary care staff.

This gave us a far bigger pool of targets and we set about developing materials that would enable us to bring those various groups on board - with messaging, media outlets and stakeholder partners selected based on their ability to persuade our broader audiences.

The MERTO Impact

The campaign delivered more than the targets set at the outset, including:

- A 645% increase in the number of GP practices getting Veteran Friendly accredited
- This was more than double the best ever month for the programme, which launched in 2018
- As most practices see a veteran patient every day, over the next 12 months, tens of thousands more veteran patients will now get access to support that has been found to be effective, thanks to these accreditations.
- The Department of Health and Social Care issued a press release applauding the surge in growth

Case Study (continued)

There were also some great outputs:

- More than 45 mentions - including NHS England, BBC News, Pulse, GP Online, Nursing Times, Management in Practice, First Practice Management, as well as BBC TV and healthcare webinar appearances for GP and veteran case studies - were secured, building trust in the RCGP programme across the wider General Practice workforce
- We more than doubled the volume of traffic visiting the programme website page
- We delivered a six fold improvement in the web page's conversion rate

“Evergreen have proven time and again that they deliver tangible impact for us through their campaign and comms work. The team carry a high spread of knowledge, are all experts in their field and are extremely easy and pleasant to work with. Their MERTO Framework enabled us to systematically identify our key stakeholder audiences, understand the way that they work and prioritise our engagement approach to deliver the best results - the impact has been big upticks in engagement and the delivery of positive outcomes.”



Andy Riley,
Head of Programmes and Projects,
the Royal College of GPs

Case Study (continued)

“You’ve done a brilliant job. I think you’re managed to turn the Accreditation programme into a mainstream requirement for GP practices.”



Dr Alan Finnigan,
Director of Nursing & Military Mental Health
University of Chester



Winner - Not for Profit Campaign of the Year - PRCA

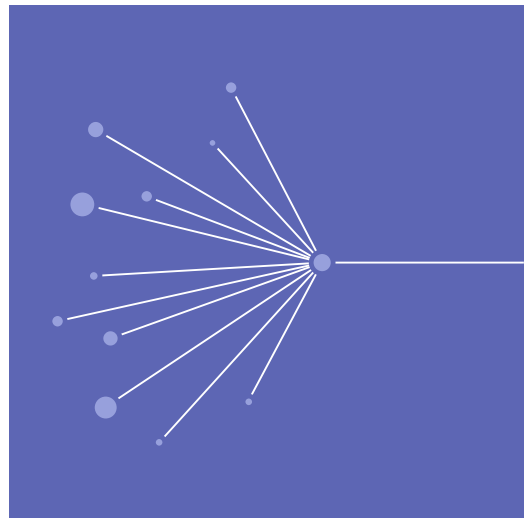
“This was a great campaign, with excellent results that made a real difference to people’s health. Really good integration of channels and methods of engagement. Very well executed.”

PRCA Awards judges

Step 3 - Prioritise the insights - uncover your audiences' barriers and drivers

To change behaviours we need to understand people in their fullest sense, as human beings that exist within a wider context.

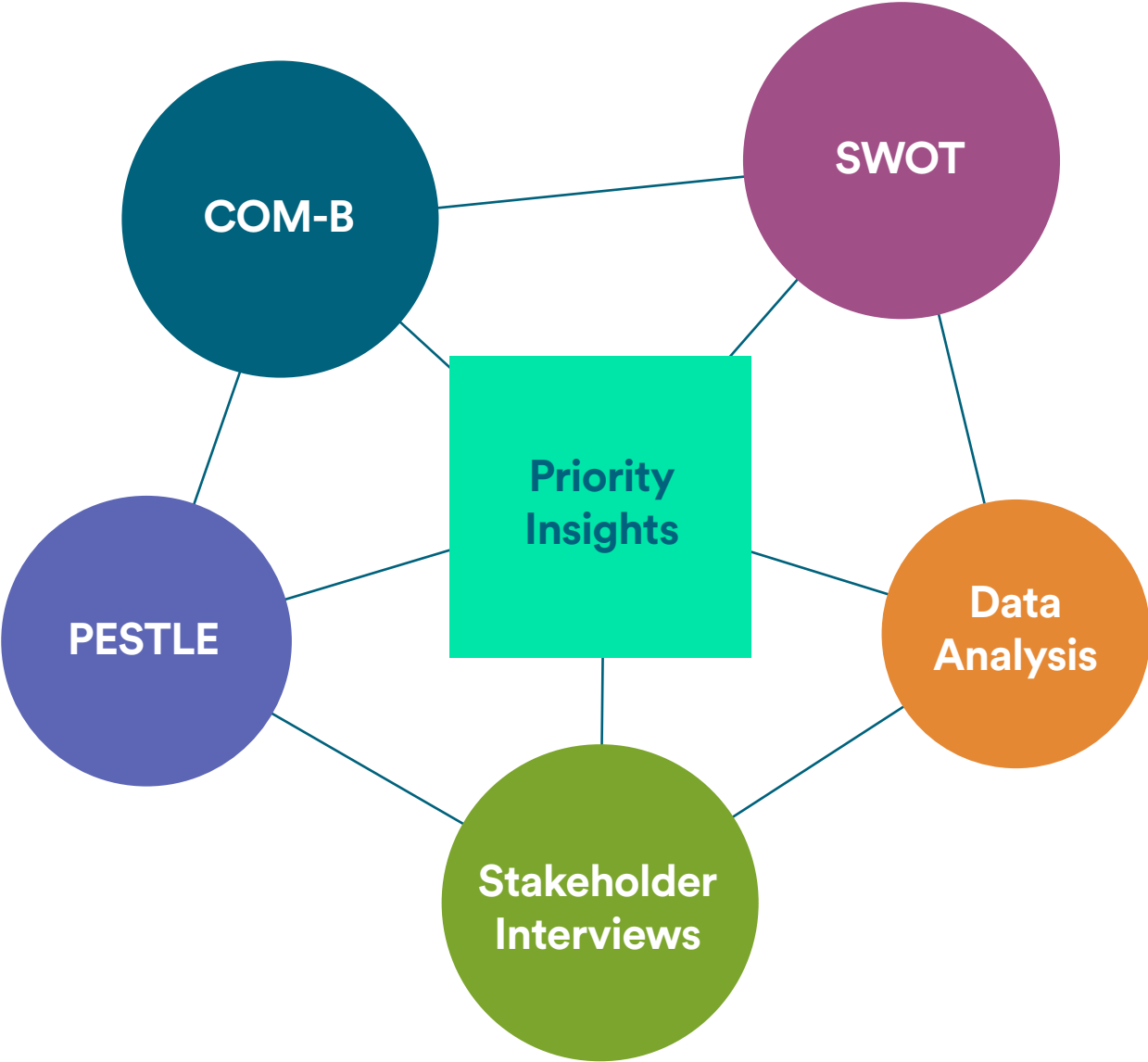
When this is done effectively we can overcome barriers to behaviour change and activate key action drivers for our Priority Audiences.



Our **Decision-Ready Insights** © process utilises a range of best practice communications and behavioural science tools to do just that.

While industry data suggests that two in three marketers believe it is not their responsibility to analyse data for their organisation or clients, we believe that this is one of the most important elements of the planning process.

With our long-term health sector knowledge, excellent data literacy skills and deep interest in human behaviour, we are able to conduct rapid analysis to deliver decision-ready insights as part of our MERTO Framework - or as a standalone service - enabling organisations to make informed decisions quickly with certainty of impact.



Our Decision-Ready Insights process uncovers the barriers and drivers that will activate your target audiences and deliver your priority outcomes.

Case Study

73% increase in direct job applications from optometrists, giving more elderly people access to at-home eyecare

We recently supported OutsideClinic, the UK's biggest provider of at-home eye care and hearing care, to drive an expansion of its workforce so that it could respond to increasing demand for its services.



The campaign delivered a significant growth in the company's workforce and 4 out of every 5 new optometrists that joined the business cited our activity as a factor in persuading them to apply for a role.

Our focus on uncovering the Priority Insights to understand the core barriers and drivers for optometrists was key to the success of the campaign - indeed we built all of our activity around it.

Case Study (continued)

Through our desk research and conversations with real optometrists, we identified:

- Priority barrier - Most optometrists have only worked on the high street and domiciliary hasn't historically been taught in universities - so there was a very low understanding among the UK's 14,000 optometrists of what a career in domiciliary would entail.
- Priority driver - Industry research showed that optometrists are typically very motivated by making a difference to people's lives and data also showed that domiciliary is the most rewarding area of work - this meant that showing what a life-changing difference OutsideClinic's optometrists make to their patient's lives would be crucial.

Based on our learnings, we set out to demystify domiciliary and bring to life what an interesting and rewarding career it is, with the launch of a new 'Discover Domiciliary' educational series, as part of an integrated campaign that put real-life optometrists at the centre.

We delivered a targeted optometry trade media campaign, utilised high quality video content based around real optometrists and launched a digital campaign, outlining a clear user journey to a campaign landing page where people could sign up for the educational webinars or apply for a role.

Case Study (continued)

The MERTO Impact

The campaign delivered the targets set at the outset, including:

- A large expansion to OutsideClinic's workforce, enabling the organisation to help more people
- 73% increase in direct applications, significantly reducing recruitment costs
- 4 in 5 optometrists cited communications activity that had been devised and delivered by Evergreen as a factor that attracted them to the business
- There was an estimated ROI of 12:1

There were also some great outputs:

- 60% above target for clinician attendees across the three webinars
- Of the attendees, 42% asked to be kept informed about job opportunities at OutsideClinic
- We generated an impressive 57 highly targeted media articles in the optometry trade press
- Our newsletters achieved a 50% open rate and 10% click-through rate on average - far above the industry average of 22% and 2.5% respectively

Case Study (continued)

- We drove more than 1,000 visits to the company's recruitment website through LinkedIn alone

“Evergreen are smart, organised and pragmatic. They were quick to learn about our business and able to put themselves in our shoes to understand our challenges and how to best overcome them. The MERTO Framework provided a clear visual route map to our target outcome. The results were excellent and better than we could have hoped for.”



Corinne Williams
HR Director, OutsideClinic

“The MERTO ensured that our activity had an excellent strategic foundation, prioritising the things that would make the biggest difference to our goals. We enjoyed the process, which prompted open dialogue and it gave us confidence that Evergreen PR understood our business and would be representing us excellently with journalists and other stakeholders - which they have! I would strongly recommend Evergreen.”

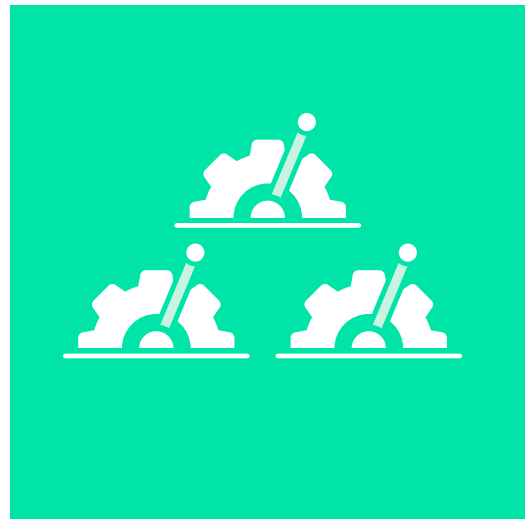


Nick Wright
Marketing Director, OutsideClinic

Step 4 - Prioritise the strategic levers - identifies the roadmap to the outcome

If we are to be successful in driving a target business outcome, we must take a birds eye view of the most important levers at our disposal and consciously prioritise them.

Our analysis for the CIPR suggests that many practitioners skip this step and go straight to planning activity, as, while 96% of national award nominated campaigns do a good job of describing their tactics, only 36% are effective in defining an overall strategy.



This is a problem as, without a clear strategy, campaigns are much less likely to deliver tangible business results and practitioners are much more likely to find themselves getting lost delivering activity that doesn't move the dial.

MERTO

Our Strategic Roadmap © process isolates the 3-4 priority levers that will have the greatest impact on helping the organisation to achieve its goal. It is the central cog in our planning process and ensures that:

- 1 We retain a high level view of the key levers for driving the outcome we are working towards
- 2 Everyone involved in the campaign - whether from Evergreen, a client or a partner - is pulling in the same direction
- 3 Our plan is based on systematic analysis of the priority audiences, priority insights and target outcome



“Evergreen have demonstrated the true potential of professional PR practice. Their clear, outcome-focused objectives, thorough research, strong insights and considered strategy have had a demonstrable impact for the client and their audiences.”

Case Study

Helped a clinical management system break into the NHS market, giving patients better and faster access to diabetes prevention support

We worked with Meddbase, a clinical management system that had recently undertaken a pilot study with an NHS Integrated Care Board.

Meddbase's software had been used to enable the NHS ICB to provide referrals to diabetes prevention support on a regional basis, taking some pressure off individual GP practices, who, it has been well-reported, are under immense pressure at the moment.



Case Study (continued)

The data showed this was an effective method and so the goal now, having proven the concept, was to bring the research to life and use it to attract other NHS ICBs to commission the Meddbase system.

Given the complexity of the story and the need to partner effectively with the NHS, setting the Strategic Roadmap was vital.

Based on the insights, we identified three Priority Levers:

- Capture attention and demonstrate effectiveness with a media relations campaign emphasising the successful results from the pilot - which had driven a 1,000+% increase in monthly referrals and a 300%+ increase in patients attending the National Diabetes Prevention Programme
- Build authority by issuing a joint evaluation report from Meddbase and the NHS ICB, outlining the background to the pilot study, its methodology, findings and learnings
- Move people down the funnel with the offer of a free educational webinar, with key members of the NHS ICB team, describing the process for implementing this pilot and how they had used the technology to increase engagement with the programme

Case Study (continued)

These three strategic levers were informed by the priority audiences and priority insights, and were designed to overcome key barriers and activate emotional drivers, as below.

- Motivation drivers - the impressive figures would show how the software can benefit both patients and the health service, while the partnership with the NHS would earn trust in the data - providing our target audience with motivation to find out more.
- Capability drivers - the detailed evaluation report and webinar with NHS team members would provide NHS ICB staff with the opportunity to learn more about how this can be delivered in practice.

The MERTO Impact

The campaign achieved significant business outcomes:.

- A handful of NHS ICBs are now in late-stage conversations about purchasing the platform and the organisation is also talking to other commercial and public sector partners
- 100+ organic NHS prospects attended one online event - this was a record number for Meddbase and was driven purely by the campaign, without any third-party support or paid activity behind it

Case Study (continued)

- The interest among the attendees was very high and one person even asked about purchasing the software during the webinar Q&A
- Proof of concept was firmly delivered in a new market

There were also some great outputs:

- In the first month, more than 1,300 people visited the study website to read the evaluation report or register for the webinar - the study page was the most visited page on the website during the week of the launch
- 16 news and views articles were generated in top tier healthcare trade media, including Digital Health, National Health Executive, Pulse and GP Online.
- The campaign secured eight high authority backlinks and the website's Domain Authority increased by six points

Case Study (continued)

“When it comes to healthcare PR I wouldn’t work with anyone else! Evergreen go above and beyond on every campaign and always put just as much effort into the smallest detail as the overarching strategy, especially when they’ve identified those details as being key to the impact we’re looking for. A delight to work with, they make even the most complex projects feel like a breeze. On this campaign they smashed it out of the park, helping us open the door to a new market and ensuring we achieved the proof of concept we were looking for - as well as those all-important column inches. The campaign only launched a few months ago but it has already helped to drive tangible revenue.”



Jaillan Yehia
Director of Public Health and Communications,
Meddbase

“This was a really successful piece of work, driving leads that ultimately led to new revenue. Evergreen’s expertise in healthcare was clear to see and meant they knew exactly what was needed to deliver an impactful campaign, identifying the best data and using exactly the right language to speak not only to our prospective customers (i.e. health organisations) but also to their customers (i.e. patients). I thought it was excellent.”

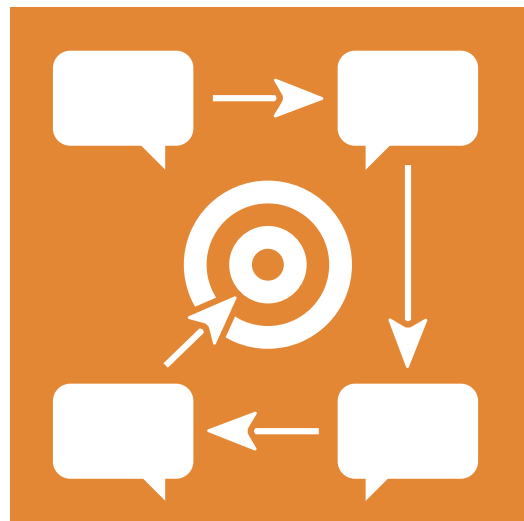


Lawrie Campbell
Chief Strategy Officer, Meddbase

Step 5 - Prioritise the messages - unlocks a behaviour changing narrative

It is impossible to overestimate the importance of messaging when it comes to driving behaviour change.

An estimated 90% of decisions are taken by our emotional brain, so a great Narrative Framework that activates people's 'motivation drivers' by "appealing to all the brain processes that energise and drive behaviour" is crucial.



Typically, this is achieved by evoking emotion, highlighting the risks of inaction or changing perceptions around the importance of a behaviour in order to make people want to act or feel that they should act.

A great narrative also ensures that people are aware of what they need to do and how they should go about it, addressing any 'capability barriers' that could get in the way of the behaviour.

We have designed our Narrative Framework to Action © method to enable the systematic identification of the Priority Messages that will drive behaviour change.

The method, which enables us to provide health organisations with a compelling and credible argument as to how they can help tackle external health challenges, is underpinned by our AEAA action-driving system, which ensures that these messages will:



MERTO

Each statement made in one of our Narrative Framework to Action documents, is backed by rigorous and fully cited evidence. This is especially important in these challenging times, as people increasingly turn to experts that can demonstrate credibility and trustworthiness.

The Narrative Framework to Action is an important part of the MERTO process, however, it can also be commissioned as a standalone service to help health organisations to unlock behaviour changing messages that will persuade priority audiences to take the action they want them to.

Case Study

Making the prospect of a Tinnitus Biobank real, driving 3,500 people to sign-up in a week and leading to conversations with funders

THE **SOUND** OF SCIENCE
The urgent need for a Tinnitus Biobank



(T)
British Tinnitus
Association

In 2023, our campaign with Tinnitus UK won the PR Week 'Public Health Campaign of the Year' and the PR Moment 'Health Campaign of the Year' awards.

We think this is because of the tangible outcomes that we managed to drive through this campaign - and there is no doubt that our Narrative Framework to Action played a big part.

Case Study (continued)

Our research had uncovered some Priority Insights, namely that there was a low public understanding of biobanks in general, that public trust in scientists had increased post-Covid and that the extremely busy health news landscape would make cutting through the noise difficult.

We knew therefore that we needed powerful messaging that would, first, capture interest, and, second, help people to understand how a Tinnitus Biobank would help in the race to find cures.

We used our AEAA formula to identify the Priority Messages:

- Attention - we won attention through a new statistic that revealed that nearly one in 10 people with tinnitus had experienced suicidal or self harm thoughts since the onset of the pandemic.
- Enthusiasm - we created enthusiasm by bringing to life how a Tinnitus Biobank could lead to a step-change in the race to find cures, using real stories of credible academics and people with tinnitus.

Case Study (continued)

- Authority - we built authority for the charity and the message, with a narrative that identified the scale of the problem, proposed the Tinnitus Biobank as a solution and included supportive statements from a number of leading academics.
- Action - we made it easy for people to understand the action they needed to take by driving them to a homepage where they could sign up to the Tinnitus Biobank project.

The MERTO Impact

This campaign had a tangible impact on people's health and delivered more than the outcomes that our client had asked for:

Outcomes

- The target of 1,000 people registering their interest within the first three months was achieved by 3pm on the first day!
- By the end of the first week, 3,500 people had signed up. After receiving a letter, the UK's biggest medical research funder invited the charity's Chief Executive to a meeting to discuss collaborating on a Tinnitus Biobank

Case Study (continued)

- The National Institute of Health Research - the UK's second biggest research funder - described the white paper as "an important and clear message"
- A leading university requested a meeting to discuss the feasibility of a Tinnitus Biobank.

Outputs

- The campaign secured 172 press articles, including some 16 nationals. It featured on BBC Breakfast TV and was "one of the most read" stories of the day on BBC News. It also featured on BBC Radio 1, Radio 5Live and was covered by The Times, the Independent, The Metro, Evening Standard, Daily Express and more. The estimated actual readership (Coveragebook) was 2.3m.
- The Tinnitus Week website was visited 20,000 times in week 1 - with 1 in 5 signing up
- The #TinnitusWeek hashtag attracted 8.6m interactions and content was shared by the Welsh Chief Medical Officer and Age UK among others
- The educational Tinnitus Biobank animation was viewed 19,000 times in the first week - double the target set.

Case Study (continued)

Winner - Best Public Health Campaign of the Year - PR Week

"Wow! A hugely impressive range of work. We loved the simple, clear call to action and desired objective, which was achieved. Very clear, simple programme that connected an isolated community and raised not only awareness but ambition for change. Well done!"



PR Week Healthcare Awards Judges

Winner - Healthcare Campaign of the Year - PR Moment

"Great to see objectives had a specific behaviour action rather than coverage - and clear to see that coming out in results too. Well done!"



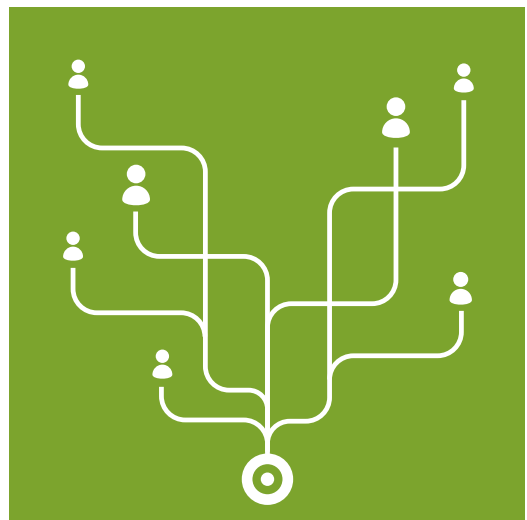
PR Moment judges

Step 6 - Prioritise the activities - map the individual user journeys to action

If we recognise that outcomes can only be achieved when audiences take specific actions then it becomes clear that we need to understand what the journey to action will look like for each of the target audiences - and those that influence them.

Our User Journey to Action © models are designed to communicate a start to finish pathway for each audience, outlining the specific behaviour that is required from each of them, the potential barriers en route and how we might overcome them.

The method, which is based on behaviour design techniques, encourages a more detailed look at the practicalities of converting your target audience to take the action you want them to take.



MERTO

In our experience, very few practitioners engage in such detailed thinking, but the process has a number of significant benefits, including:

- 1 Encouraging a granular focus on each of your target audiences individually, so you can ensure that you are taking sufficient steps to activate the priority actors
- 2 Allowing you to gain a full picture understanding of how your various audiences will interact along the campaign journey, enabling you to prioritise activities that are needed to activate multiple audiences
- 3 Enabling you to maximise efficiency and eliminate waste by thinking through - and showing clearly - the purpose of each of the recommended activities

Example

With any campaign, success is unlikely to be achieved by focusing only on a single audience and we usually need to influence the behaviour of a multitude of individuals and organisations to achieve a desired outcome. Our detailed planning process is key to achieving this.



Case Study (continued)

Let's imagine that we're working with an organisation that can provide support to a specific group of healthcare professionals working in the NHS.

At the decision-maker level, we might have General Practitioners and Practice Managers. They might be influenced by a whole combination of people, including trade healthcare media, patient voices, other practices, their Primary Care Network and many others.

Each of these groups has different barriers and drivers that will need to be considered.

For example, if working with a trade media title on an opinion article from a GP advocate, we must consider the barriers, drivers and activities for multiple audiences, including the journalist, the GP who is authoring the article and the practice manager or GP reader.

This means thinking in detail about what will appeal to the journalist, that meets the requirements of the organisation, that the GP author will be motivated to write and that, ultimately, will encourage the behaviour we want to see from the final reader.

Case Study (continued)

Of course, a single article will rarely be enough to drive behaviour on its own, and so we need to zoom out and consider all of a campaign's proposed activities in this level of detail, so that we can truly see how the campaign as a whole fits together and identify the Priority Moments and pivotal milestones that will dictate its success.

User Journeys to Action enable us to do this. The visual method equips us to take a 360 degree view of a campaign, so that we can make insight-driven adjustments as needed and maximise certainty of success.

With crystal clear thinking, we can then convert this into an audience-focused recommended activity list, which is ready for sign-off.

Let us help you to 'consciously prioritise' to achieve your most important business outcomes while also improving people's health.

If you are dedicated to improving health then we want to work with you.

You can use our unique MERTO method in two ways:

1. MERTO Workshop - Bring your senior team together and explore your biggest business problems through a behaviour science and prioritisation lens - utilising our unique tools and considerable expertise to discover, together, the most effective route to your priority outcomes.
2. MERTO Framework - Guarantee the delivery of achieving your target outcomes by allowing us to use data, audience insight and an array of prioritisation and behaviour science tools in a systematic process to identify, with certainty, the most effective route to outcomes for you.

If you're interested in either of these services, please get in touch with Leigh today at: leigh@evergreenpr.co.uk

MERTO Uncovered

Why not try before you buy?

To mark the official launch of our MERTO services, we've created a free 9-part email series that uncovers the secrets to health communications that drive tangible ROI.

Shared over the course of a month, 'MERTO Uncovered' will provide you with a flavour of the prioritisation and behaviour science secrets you need to trigger audience actions that deliver business and health outcomes.

Sign-up for FREE here.

| About Evergreen PR

Evergreen PR is the outcomes-driving communications consultancy for health organisations and we're on a mission to transform people's health.

We use our extensive health expertise and MERTO - our proven 'Conscious Prioritisation' Framework for Achieving Business and Health Outcomes - to effectively and efficiently deliver the impact that matters to you, so you can help more people.

Our clients include NHS organisations, royal colleges, health charities, household name private companies and health technology scale-ups. The thing that unites us with our clients is our belief that, by working together, we can achieve tangible outcomes that ultimately improve people's health.

In our first three years of trading, we have won some 30 industry awards for our outcomes-driving campaigns. We succeed because we have the tools and understanding to effectively elicit behaviour change that drives impact and because we passionately care about outcomes and health.

If you are working to improve people's health, then we'd love to help you increase your impact.

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