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Getting started with your healthcare marketing agency.

A step-by-step guide to onboarding with Cardinal—built for multi-site healthcare organizations.

Switching to a new digital marketing agency can seem...complicated. What should you expect throughout the process? What does your team need to bring to the table to smooth the transition? And what the heck is going to happen to your existing campaigns, conversion rates, and leads?

All good **questions.**

No healthcare organization has time for steps in the wrong direction, and we get that.

Having been through the process a time or two, we've put together a quick guide to help you navigate the agency onboarding process.

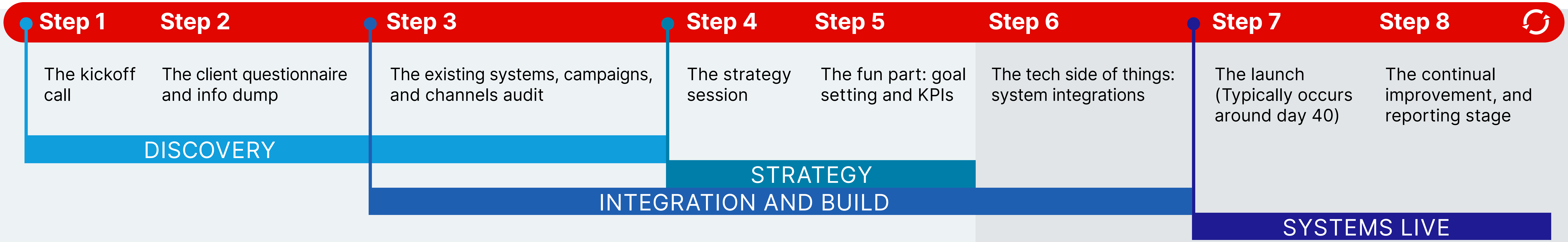
Whether you're expanding into new markets, optimizing underperforming campaigns, or parting ways with an agency that couldn't scale with your business, this guide lays out what to expect, what to avoid, and what so-called onboarding nightmares you can finally put to rest.

It's not that bad, we promise (at least, it doesn't have to be).

What is the agency onboarding **process flow**?

Disclaimer alert: timelines, expectations, and outcomes will vary. Every business is different. Some groups come to us with complex, multi-brand campaigns already in motion, while others are building from the ground up. That said, understanding each part of the onboarding process helps both teams move efficiently and avoid missteps.

We've outlined a standard 90-day framework that works across all engagements. But depending on your service mix—whether that's Paid Media, SEO, Creative, or all of the above—there may be slight variations. Once you've reviewed the proposal and signed the contract, here's what to expect from a typical 90-day onboarding with Cardinal.



The first 30 days are the most important. We'll assess your current digital marketing program, develop your new strategy, and build your campaigns.

By day 31, the strategy has been approved and integrations are complete. Now, the campaigns will be built.

How your onboarding process flow can **vary by service.**

Think of this as a rough guide, not a rulebook. Every healthcare organization is different, so depending on your services and goals, we'll tweak the timeline and priorities to fit what works best for you.

Service	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Paid Media	• Kickoff call • Account access	• Questionnaire • Business Orientation	• Quick-win audit	• Strategy session	• Tech & analytics review • Dashboard V1	• Media takeover • Dashboard V2	• Optimizations	• Investment strategy • Final dashboard • Media mix updates • Ongoing testing
SEO	• Kickoff call • Account access	• Questionnaire • Business Orientation	• Quick-win audit • Local SEO & page audits	• Strategy session	• Present audit & strategy	• Deploy quick-win fixes	• Dashboard V1	• Content & technical optimizations • Final dashboard
Creative	• Kickoff call	• Audience & ICP alignment	• Asset review	• Strategy session	• Media mix assessment	• Initial creative audit	• Present audit of active assets • Align with media plan	• Develop core asset templates • Ongoing strategy

Step 1: Kickoff call.

Hi, hello, it's nice to meet you.

This first call is a chance for all primary stakeholders on each side of the table to get acquainted with who they'll be working with and set expectations around communication.

It's also a good time for the agency (that's us!) to layout each step in the onboarding process, answer questions, and lay the groundwork for the next step so that everyone is on the same page.

Who should be there?

Client side:
- CMO
- Director of Marketing
- Digital Marketing Manager
- PPC & SEO Specialists

Agency side:
- Your Account Manager
- Richard Accardi, VP of Client Services

*Team members will be added as needed, based on the services being provided.

Step 2:
Client questionnaire + info dump.

No, we won't ask you for your social security number or marital status (phew!). But we will want to get as much detail as possible around your existing marketing stack, strategy, team dynamics, goals, objectives, and any important documents that might be of use.

The questionnaire helps grease the wheels—the more time and attention you spend on it, the faster your new marketing team will be able to deliver value.

Onboarding Questions

What does success look like?

In the business? In the partnership?

Who are your ICPs?

What does a typical patient look like? Who can we not serve?

What are your USPs?

Why choose brand? What sets you apart?

Competitive Challenges

What are your biggest threats to growth? Anyone we should keep an eye on?

Priorities for us to focus on?

Clinics with the most capacity, focus service lines, in-person vs. virtual

Growth Plans?

Opening new clinics? Same store growth? New states?

Step 3:
Audit of existing campaigns, systems, & channels.

Sounds scary, but it's really not. We'll do a deep dive into your current marketing ecosystem. Our team will review your entire tech stack, APIs, internal systems, and marketing channel mix–—ensuring everything is HIPAA-compliant. We'll also take a close look at your existing campaigns and performance.

This is a crucial step, as it's an opportunity not only to see what you have and what's working, but what you don't yet have and what you need to get results.

As soon as the audit is complete, we'll provide you with recommendations for your existing campaigns. We'll also assume management of them and make sure they continue to deliver a steady flow of leads throughout the onboarding process.

Transitioning campaigns without missing a beat.

In some instances, we can optimize your campaigns and provide you with some quick wins by pausing low-converting keywords, tightening targeting, or activating basic ad extensions.

But most often, we'll recommend that you retire your old campaigns. Don't worry. This transition is carefully timed so that you don't experience a dip in leads.

Step 4:
Strategy session.

This is when we dive in—sometimes for a full day or two—to really understand your healthcare organization's goals, challenges, and patient acquisition needs. Our focus is on identifying clear, measurable outcomes that matter most to your team and crafting a strategic plan tailored to how we'll achieve them.

What to expect

By around day 30—often sooner—you'll receive detailed audit reports, along with actionable recommendations for your current campaigns. Upon your review and approval, we'll begin building your campaigns and will be ready to launch as we move into the second month of our partnership.

Step 5:
Goal setting & KPIs.

Again, any healthcare marketing agency worth its salt is going to be highly focused on **measurable** outcomes.

What short-term and long-term goals do you want to achieve? Which KPIs will best track progress toward those targets? And how do these tie into your broader business objectives?

We'll want to know your existing business goals, marketing KPIs, and historical data so we can build from there.

For example, you might aim to acquire 100 new patients per month at high-capacity locations, 60 at smaller sites, and maintain volume where your brand is strongest, adjusting for market differences.

Potential KPIs we can report on:

- Number of leads
- Number of booked appointments
- Conversion rate
- Cost per lead
- Patient acquisition cost (PAC)
- Customer lifetime value (CLV)

We'll work closely with you and your leadership to make sure we build campaigns that truly move the needle for your healthcare group.

Questions we'll explore:

- Are you focused on system-wide patient growth or specific locations?
- Is growing new clinics or service lines a priority?
- What capacity or competitive challenges should we factor in?

Step 6:
Tech system integrations & dashboards.

You have existing systems and technology, and so too will your agency. At this important step, we'll work together to make sure everything is integrated properly and the *right* people have access to the *right* tools.

This lets us pull the *right* data together and build a custom dashboard just for your healthcare organization. We hope to have a clear, easy-to-understand view of everything about 30 days after we get started—once we have enough data flowing in.

Marketing technology stack access

To kick things off, we'll need access or login info for these:

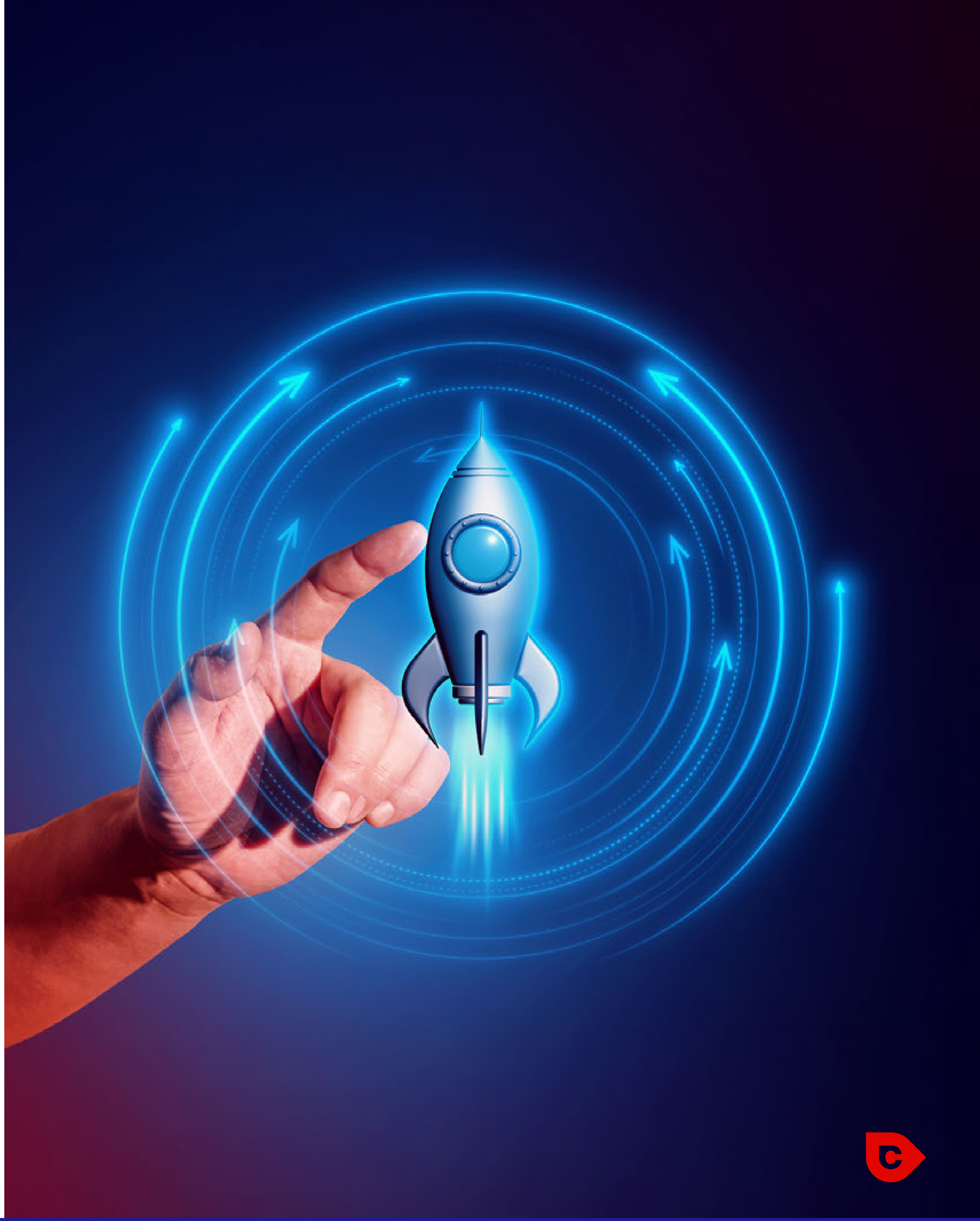
- Website CMS
- Google (Analytics, Tag Manager, Search Console, Ads)
- Email platforms (MailChimp, Constant Contact, etc.)
- Marketing automation tools (HubSpot, Marketo, Pardot, etc.)
- Social media accounts and ad managers
- Call tracking software (Patient Prism, Liine, Invoca)
- CRM
- EHR

We might also chat with your website or CRM folks to make sure everything connects right.

Step 7:
Launch time.

The audit is complete, all systems are integrated, and the strategy has been approved. Now is the moment you've been waiting for: it's time to launch all the campaigns!

Your new campaigns are typically launched around day 31 to 40.



Step 8: Optimization & reporting.

Launching campaigns is good, but it's just the first step. Continual improvement is an essential part of successful healthcare marketing strategy. We don't just set it and forget it. We closely monitor your campaign's performance, communicate updates, and adjust campaigns to ensure we meet your strategic objectives.

This doesn't just happen once or twice; it's an integral part of our process and will continue throughout our partnership.

We don't just monitor your campaigns—we stay ahead of the curve in the fast-evolving digital marketing landscape. We quickly adapt to Google algorithm changes, track emerging media trends, and optimize your campaigns to follow the latest best practices—making sure your results keep improving.

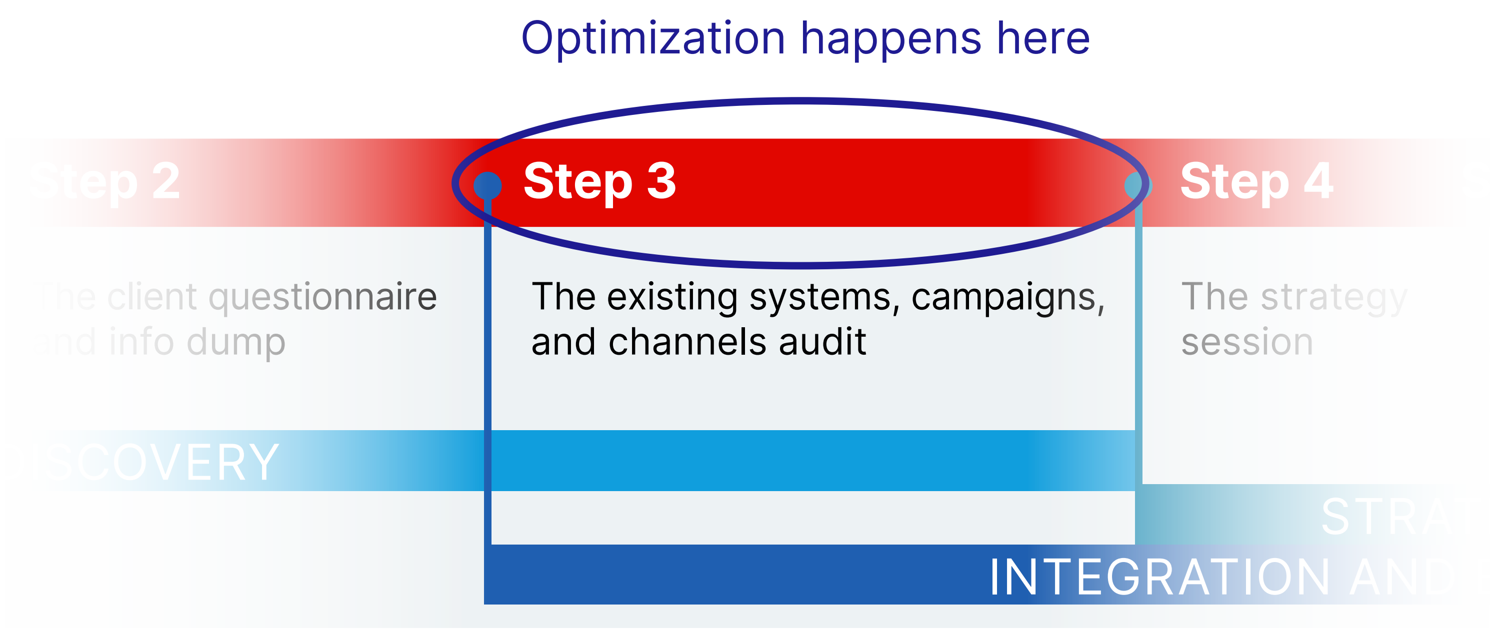
Campaign Review and Optimization

Cardinal will deliver campaign updates at regular intervals. Based on your service level agreement (SLA), you can expect:

- Weekly campaign updates
- Monthly reports
- Quarterly Business Reviews (QBRs)

If at any time you feel things aren't working or if you want to discuss a new approach, you can reach out to your Account Manager.

Wait, wait– what will happen to my existing campaigns?!



A good digital marketing agency isn't necessarily going to come in and blow everything up. Why change or get rid of something that's delivering favorable outcomes?

Yet, you wouldn't be contracting with a new digital marketing agency if your campaigns were meeting expectations.

Here's how we handle your existing campaigns:

Assess
First, we dig deep into your current campaigns—their goals, performance, and overall health. From there, we decide whether to optimize or sunset specific campaigns. If we retire any, it's carefully timed to avoid any drop in patient leads.

Refine, Retool, Restructure
For campaigns hitting the mark, we look for ways to boost performance—improving conversion rates and aligning them with your evolving strategy. These campaigns keep running through onboarding, fully integrated into your new marketing plan.

Expand
We also spot opportunities to grow, whether that's enhancing current campaigns or adding new channels and services you haven't explored yet.

And we don't wait until day 30 to get started. As soon as we get access and finish the audit, optimization kicks off immediately.

Key considerations when onboarding with a new agency.

First, why did you decide to make the change in the first place? Is it because you don't have enough resources in-house to execute a full-funnel strategy? Or maybe you had contracted with another agency and the relationship started going south? Understanding the why can help you prepare for a smoother transition with the new agency that you end up retaining.

During agency onboarding, here are a few things to look for:

- Communication and transparency
- Accommodation and collaboration, not "my way or the highway"
- Emphasis on measurable outcomes (including how, specifically, to get there)
- Follow-up, follow-up, follow-up (accountability)

Once we get started, we encourage you to revisit the agency onboarding timeline we've provided, sample checklist items, and things to look out for as you begin this important transition. As always, do let us know if there's any way that we can help.

See how Cardinal's custom performance marketing solutions drive real results.

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