



AI EMPOWERED

an essential guidebook for healthcare
marketers exploring artificial intelligence

Elise Horst
ASSOCIATE DIRECTOR, AI SOLUTIONS

Scott Mowery
ASSOCIATE DIRECTOR, DATA INNOVATION



MAY 2025 EDITION

“The transformational potential of artificial intelligence is extraordinary. And it’s here. **Right now.**”

Curiosity is at the heart of great marketing. In healthcare, where complexity and constraints are far too normal, curiosity fuels innovation—and today, nothing holds more potential for transformation than AI.

AI isn’t just the next big thing. It’s our opportunity as marketers to reimagine how we connect with patients, optimize campaigns, and overcome long-standing challenges. Whether you’re just beginning to explore AI or are already testing its capabilities, this guidebook offers resources to accelerate your journey, as informed by our work with leading hospitals and health systems.

Inside, you’ll find practical, healthcare-specific use cases and clear ideas for how to use AI to solve problems, spark creativity, and enhance marketing results.

At Fathom, an IQVIA business, we believe AI can help you do more of what matters. Let’s explore what’s possible, unleash your curiosity, and take advantage of the opportunity to lead transformation.



Elise Horst
ASSOCIATE DIRECTOR, AI SOLUTIONS

what’s inside

introduction to AI

3

- hype vs. reality
- what is (+ isn’t) AI?

strategic AI adoption

5

- deliver + demonstrate value
- reskill + upskill your team
- understand + unlock your data
- enhance your creative + content strategy
- find + create efficiencies in your work

key considerations

14

- ethics + transparency
- security + privacy

adoption + application

17

- use cases + tools
- prompt library
- AI patchworks
- resources
- glossary of terms
- AI adoption checklist

hype versus reality

The conversation around AI can feel overwhelming – part excitement, part uncertainty. Some see it as a silver bullet. Others aren't sure where to begin. The truth lies in between.

Here's what we know to be true right now based on hands-on experience with healthcare marketers:

HYPE:

AI eliminates the need for subject matter expertise



REALITY:

AI helps accelerate work, but it functions best with your guidance and knowledge. Chances are if you have a large skills gap on your team, AI won't successfully fill it all on its own.

HYPE:

AI will save you immense time right away



REALITY:

Early adoption often feels slower. But over time, AI creates meaningful efficiencies through better processes, not just faster outputs.

HYPE:

AI adoption is a one-time decision



REALITY:

The AI landscape is evolving quickly. Adoption is going to ebb and flow and technology changes and skillsets catch up. Be ready to pivot and rethink what adoption looks like.

HYPE:

AI is only for content creation



REALITY:

Content generation is a powerful use case, but don't underestimate AI's ability to analyze data, prioritize your work, and support strategic planning.

HYPE:

AI adoption means a big overhaul for my team



REALITY:

Most success stories start small. Try one tool, one use case, one team, and build on your learnings to scale.

what is AI?

And More Importantly, What Is It Not?

AI IS:

A Catalyst for Innovation: AI is revolutionizing healthcare, from research to diagnostics, paving the way for faster, more accurate medical breakthroughs.

An Accelerator for Marketing: Through rapid data analysis, AI enhances decision-making and optimizes campaigns, tailoring them to specific healthcare audiences.

A Navigator for Patient Journeys: Predicting behaviors and preferences, AI enables personalized marketing strategies that resonate with individual healthcare journeys.

An Operational Powerhouse: Beyond marketing, AI improves healthcare operations like scheduling, directly benefiting marketing strategies by identifying needs and opportunities.

A Data Dynamo and Personalization Pro: AI uncovers insights and trends from vast datasets and tailors marketing messages to individual preferences, boosting engagement.

A Partner in Productivity: Automating routine tasks, AI allows marketers to focus on strategic and creative work.

A Forecasting Genius: With predictive analytics, AI forecasts trends and outcomes, aiding in resource allocation and future planning.

AI IS NOT:

A Replacement for Human Insight: AI supports decisions but can't replicate the nuanced judgment required in healthcare marketing.

A Standalone Solution: It's part of a broader strategy, requiring expert oversight.

Fully Autonomous in Creativity: AI assists in content generation, but human creativity is essential for effective marketing materials.

A Fix-All: While powerful, AI doesn't replace strategic planning, creative content, or human interaction.

Capable of Replacing Empathy: AI can't mimic the empathetic interactions crucial in healthcare, emphasizing the value of a human's touch in patient care and marketing.

“AI isn't here to replace us—it's here to work alongside us, elevating our capabilities.”

Elise Horst
ASSOCIATE DIRECTOR, AI SOLUTIONS



strategic AI adoption

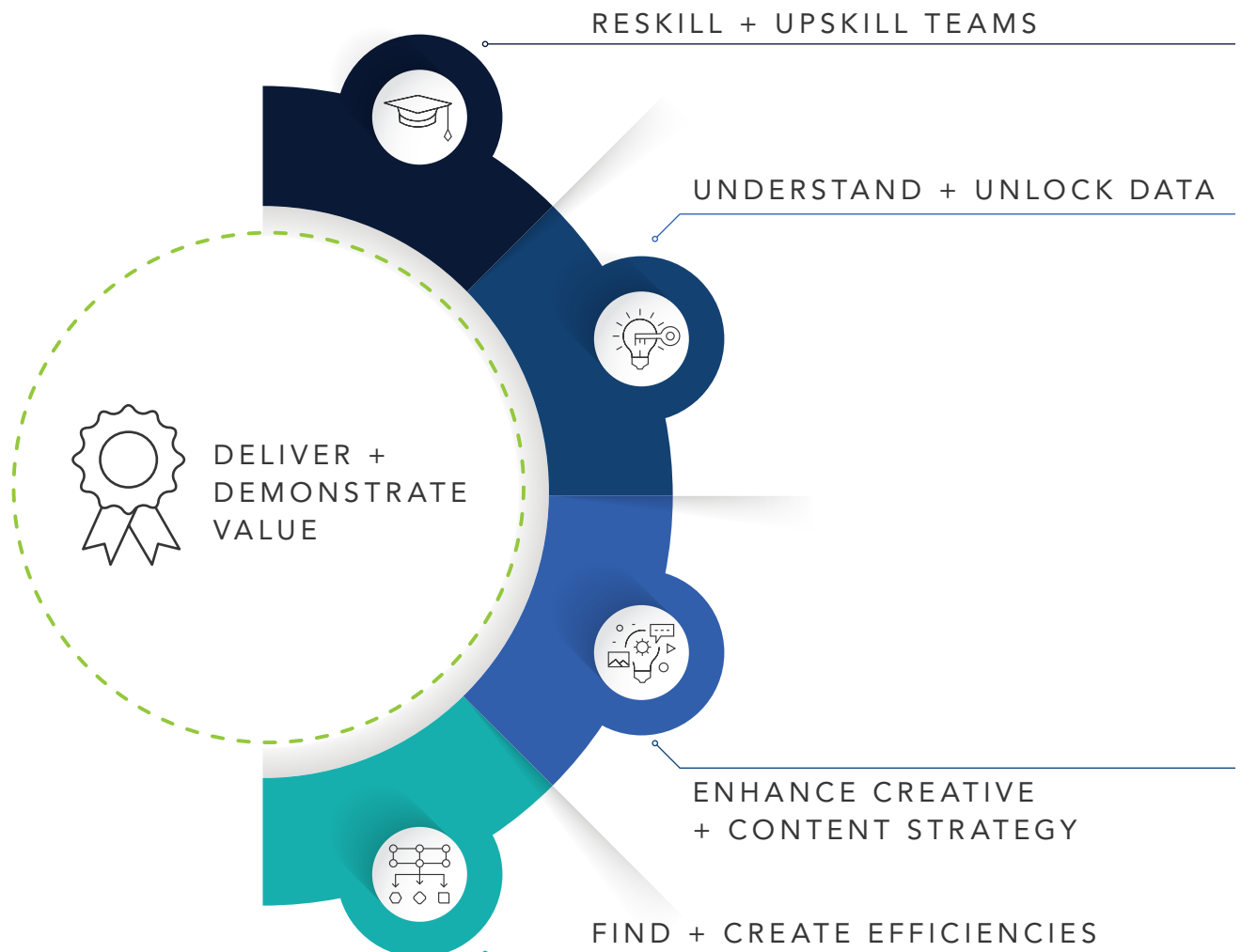
With a baseline understanding of AI and its influence on healthcare and healthcare marketing, you might wonder, “What should I do first?” Whether it’s born out of leadership directives or through sheer curiosity, this is the one question we hear most often.

OUR GUIDANCE:

Before you define *What*, make sure you know *Why*.

The healthcare marketers we work with use AI to create and optimize content, enhance digital experiences through AI-generated videos, draft marketing materials, and produce multimedia content. And at Fathom, we’re using AI for advanced data analysis, personalization, improving patient engagement, and optimizing marketing strategies. But in both cases, we began with a clear goal: to deliver and demonstrate value.

We’ve found the following framework helpful for aligning your AI adoption journey to your organizational and team goals. We encourage always starting with a focus on delivering and demonstrating value. From there, determine which areas allow you to make the fastest, most meaningful impact for your organization.





deliver + demonstrate value

Use AI prove and enhance impact

AI adoption shouldn't be the goal. Value creation is. As marketing teams take on more responsibility with fewer resources, AI can help you both create more value (through smarter strategy, deeper insights, and faster output) and show that value in ways your stakeholders will feel and understand.

AI can help you

- Grow patient volume by optimizing campaign performance and budget allocations
- Enhance patient experiences through personalization and journey insights
- Save time and budget by automating repetitive tasks
- Make more data-driven decisions instead of relying solely on requests and preferences
- Prove marketing's contribution through clearer reporting and storytelling

What You Should Consider to Enhance Value Creation

- Data-led content strategy and copywriting
- Extending content
- Persona development
- Philanthropy applications
- Advanced data analysis
- Workflow optimization

Here are some examples of ways AI is already delivering value behind the scenes

- **In ad platforms like Google Ads, Meta, DSPs, etc.:** AI is auto-optimizing your campaigns to ensure every dollar is spent on impressions and clicks most likely to get you closer to your goal.
- **In marketing automation tools:** AI is helping you segment your audience, improve delivery, and tailor your content.
- **Chatbots and virtual assistants:** AI is likely helping patients navigate your health system by directing them to relevant resources or helping them schedule appointments.
- **Google AI overviews:** These AI-generated summaries are more prevalent for healthcare-related queries than any other topic. They're helping patients answer their health questions faster and more easily than ever before.

AI delivers its greatest impact when guided by human expertise. It brings speed and scale, but your insight, creativity, and strategic direction turn that potential into real-world results.



Scott Mowery
ASSOCIATE DIRECTOR,
DATA INNOVATION

“

Healthcare organizations can benefit from connecting siloed data sources to fuel more impactful AI-driven marketing strategies. To accomplish this, prioritize assembling your data stewards to establish a unified data governance framework.





deliver + demonstrate value

What You Should Consider to Enhance Value Creation

DATA-LED CONTENT STRATEGY + COPYWRITING

Leveraging the power of machine learning can help you analyze vast and disparate historical ad performance and competitor data, delivering deep insights quickly. Feed those insights into your favorite Large Language Model to create suggested ad copy variations to test and improve performance.

EXTENDING CONTENT

The true value of great content is often unrealized. Use AI to turn existing collateral into multimedia content, storyboards, multilingual translations, audio, and more. At the very least, turn long-form content into bite-size nuggets for social media and other short-form channels.

PERSONA DEVELOPMENT

Every service line has a unique patient journey. Integrating Large Language Models into your persona development process allows you to create deeper perspectives on a broader set of audiences. Consider the factors influencing their healthcare decisions, forecasted market trends, and the precise identification of the media they engage with.

PHILANTHROPY APPLICATIONS

AI-powered models can combine and segment donor data with CRM and patient data to fuel grateful patient campaigns. By identifying high-potential donors and prospects for planned giving in this manner, you can set development teams up for success through focus.

ADVANCE DATA ANALYSIS

The limitations of PHI shouldn't stop you from analyzing the available data to make more informed marketing decisions, forecasts, and content. AI tools can help you answer complex questions quickly. Consider summarizing month-over-month trends, generating forecasts, conducting search keyword audits, evaluating your advertising bid caps, and conducting all of that analysis overall, with seasonality in mind, and by service or sub-service.

WORKFLOW OPTIMIZATION

If you support multiple service lines, you have many requests and unique needs to manage. By embedding AI into your workflows, you can more efficiently create content, report on results, manage tasks, and share valuable insights.



reskill + upskill

For healthcare marketing leaders, a common challenge often lies in reskilling and upskilling their teams to effectively harness AI's potential. Here's a step-by-step process you can use to empower your team with AI capabilities, ensuring a smooth transition that aligns with ethical standards and strategic goals.

1 Establish a Cross-Functional AI Council

OBJECTIVE:

Collaborate on shared definitions, understanding, and vision for AI usage within the organization.

BENEFITS:

Promotes diversity in opinions, enriching ethical output and fostering an inclusive AI integration process.

PRO-TIP:

Find 1-3 people already passionate about and energized by AI. Include them on your council, leveraging their enthusiasm to drive experimentation and solution development.

2 Gain Leadership Support

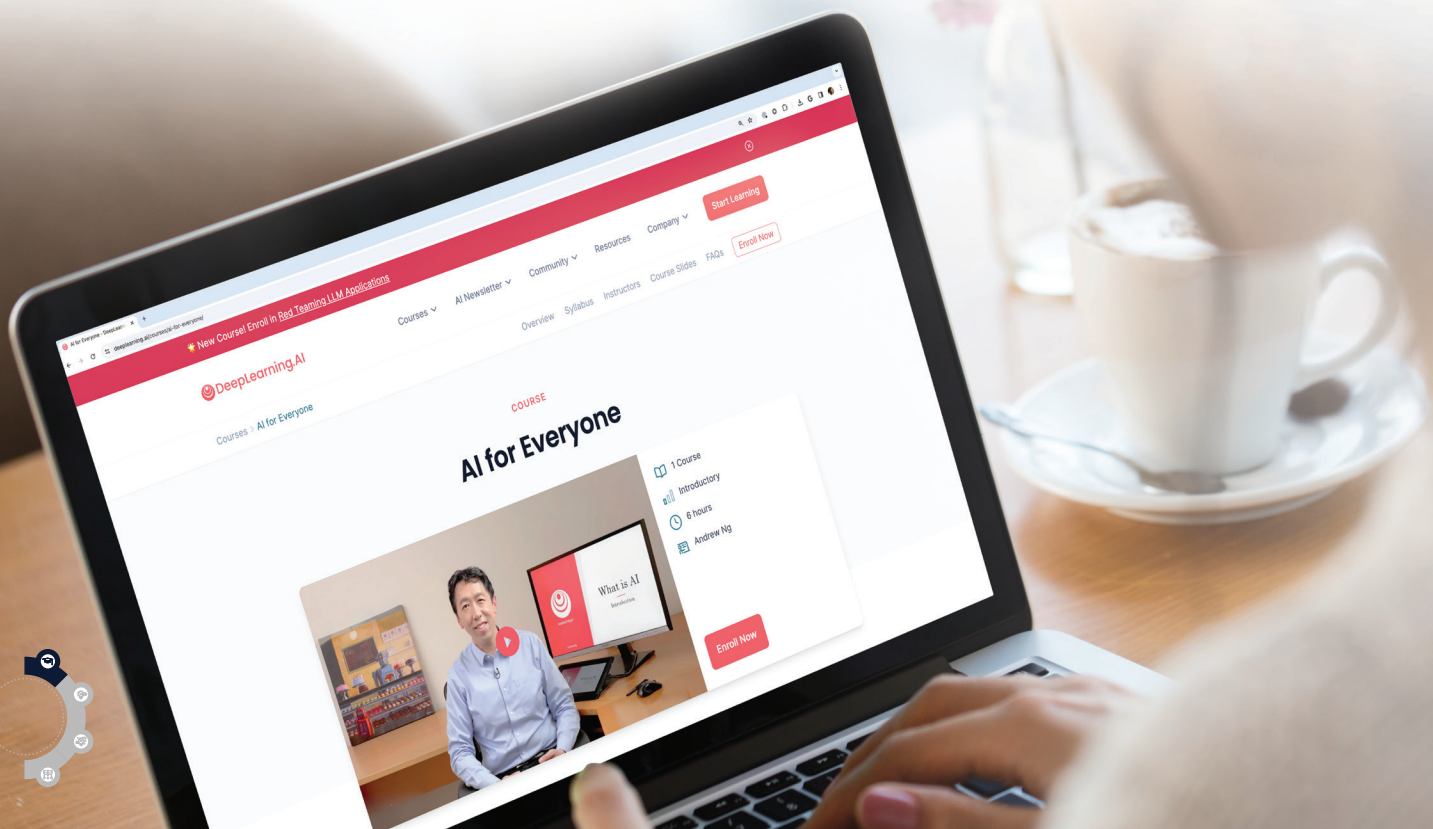
IMPORTANCE:

Leadership's endorsement is crucial for emphasizing the strategic role of AI in improving patient engagement and marketing outcomes.

3 Develop a Strategy

DEVELOP:

- Outline the purpose, benefits, and expected outcomes of AI integration.
- Ensure clarity and transparency in all communications regarding AI initiatives.





reskill + upskill

4 Build a Foundation on Shared Understanding

FOUNDATION:

Focus on educating the team about the vision and ethical standards before delving into practical applications.

KEY AREAS:

- What's possible with AI in healthcare marketing.
- AI technologies that align with your vision and ethical standards.

6 Initiate Pilot Projects + Incremental Implementation

STARTING POINT:

Identify areas with high enthusiasm and potential for a significant impact with minimal initial effort.

APPROACH:

Begin with small, focused projects to demonstrate AI's value and gradually expand AI integration based on successes and learnings.

5 Implement Learning + Development Programs

METHODS:

- Workshops, online courses, and webinars for foundational knowledge.
- Seminars and conferences for industry-specific insights.
- Cross-functional collaboration and experimentation to encourage practical learning and innovative thinking.



Practical Steps for Teams

- Encourage team members to participate in AI-focused workshops and webinars.
- Facilitate attendance at seminars and conferences to stay abreast of industry trends.
- Promote cross-functional projects that allow team members to apply AI concepts in a controlled, experimental environment.

RESOURCES WE RECOMMEND

[Piloting AI for Marketers](#) from the Marketing AI Institute



[AI for Everyone](#) from DeepLearning.ai



DeepLearning.AI





understand + unlock data

AI is only as good as the data it can access and learn from. For marketers, that means unlocking the full potential of your campaign performance, audience behavior, and conversion data.

Whether you're consolidating data sources or just starting to explore what's available, AI can help you extract insights, streamline decisions, and power personalization at scale.

1 Here's how to start

Audit what you already have. Even without a full data warehouse, you likely have access to:

- **Campaign performance data:** e.g., Google Ads, Meta, programmatic platforms
- **Website behavior:** via tools like Adobe or Piwik Pro
- **CRM or lead data:** email engagement, patient inquiries, form fills
- **Third-party tools:** e.g., call tracking, reputation management, health risk assessments

Use AI to help map these sources. Ask: What data is available? Where does it live? How often is it updated? Who owns it?

2 Extract insights using AI

Once you know what you have, let AI help you interpret it:

- Identify high-performing content by service line
- Spot seasonal trends or referral source patterns
- Surface keywords or topics tied to conversion
- Forecast lead volume based on historical trends
- Look for gaps or operational roadblocks in the patient journey

3 Start small with AI-driven actions

You don't need perfect data to get started. Some easy wins include:

- Use AI to segment your audience based on behavior (e.g., top email-engagers)
- Feed content from under-performing web pages to a LLM and request improvements
- Pair CRM data with AI to generate persona insights
- Automate routine reporting to free up time for analysis

4 Don't Forget Governance

Work with your data, privacy, and compliance teams to:

- Ensure no PII is making its way into unsecure AI tools
- Establish clear access permissions for AI tools
- Align on which AI platforms are secure enough to handle specific types of data and which are not

You might already be doing this if..."

You export campaign data to Excel and summarize trends



Try using AI to automate that summary.

You manually review keyword reports



Use AI to flag underperformers or new keyword ideas.

You build monthly reports for stakeholders



Use AI to create "executive summary" callouts with plain-language insights.





enhance creative + content strategy

While many have begun to explore AI's potential in generating content and enhancing creativity, the true power lies in going beyond the basics to unlock deep, data-driven insights that can significantly elevate content strategy and output.

You May Already Be Using AI for These Applications

Producing initial drafts for marketing copy across various channels.

Generating blog posts, social media updates, and other content tailored to different patient types and service lines.

Brainstorming new ideas for copy across digital assets.

Creating AI-generated multimedia and images targeting specific patient segments.

Crafting FAQs and educational materials for patients.

Simplifying complex medical information into more accessible formats.

But Have You Tried These Yet?

To get the most out of the marketing AI tools available today, consider these advanced tactics:



DATA-DRIVEN CONTENT ANALYSIS:

- Analyze large datasets to identify key topics, language, and performance drivers.
- Use insights from performance data to inform content creation, focusing on what engages your audience most effectively.



CONTENT ROADMAPS BASED ON PERFORMANCE:

- Develop content strategies that prioritize topics and formats with the highest engagement, informed by a thorough analysis of performance indicators.



COMPETITIVE ANALYSIS FOR UNIQUE MESSAGING:

- Extract and analyze competitor content to identify oversaturated and underserved topics and messaging strategies.
- Leverage AI to find opportunities where your content can stand out.

73%

OF MARKETERS SAY AI PLAYS A ROLE IN CREATING PERSONALIZED CUSTOMER EXPERIENCES

Source: SurveyMonkey - 2024





enhance creative + content strategy

AN EXAMPLE FROM OUR WORK WITH A TOP HEALTH SYSTEM

Before AI Integration:

Ad copy was crafted based on stakeholder inputs and information from service line landing pages, achieving only benchmark averages in performance.

After AI Integration:

- Developed strategic personas to understand the patient journey deeply.
- Analyzed five years of PPC keyword and ad copy data to identify high-performing messaging trends.
- Aligned messaging with the behaviors and psychographics of strategic personas.
- Assessed competitor strategies to determine the saturation of key messages in the market.
- Investigated market trends for seasonality and regional demand variations.
- Synthesized research and insights to guide the creation of top-performing ad copy.
- Ideated content angles based on strategic insights and research.

With insights and strategic directions from AI, we crafted the final nuanced PPC ad copy, collaborating closely with clients for revisions and market implementation.

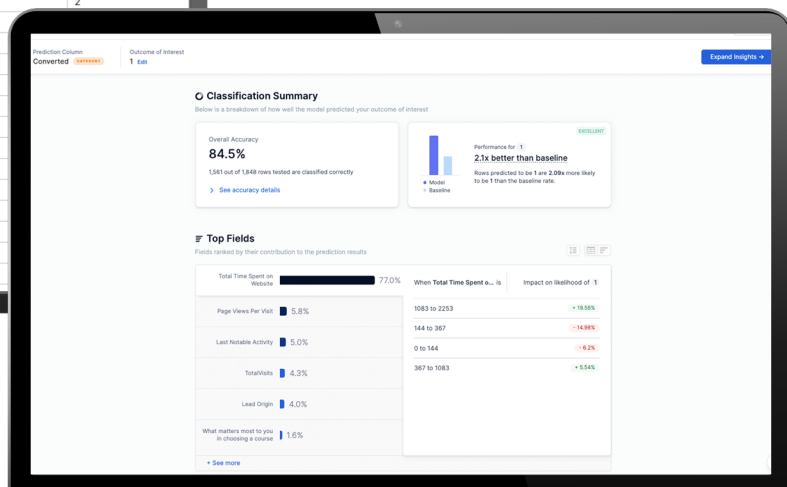
Lead Origin	Lead Source	Do Not Email	Do Not Call	Converted	TotalVisits			
Category	Category	Category	Category	Category	Number			
Landing Page ...	Google	31%	No	92.1%	No	100%	0	61.5%
API	Direct Traffic	27.5%	Yes	7.9%	Yes	6%	1	38.5%
Other	Other	41.4%					0	251
API	Olark Chat	No	No	0	0	0	0	0
API	Organic Search	No	No	0	5	0	5	0
Landing Page Submission	Direct Traffic	No	No	1	2	0	2	0
Landing Page Submission	Direct Traffic	No	No	0	1	0	1	0
Landing Page Submission	Google	No	No	1	2	0	2	0
API	Olark Chat	No	No	0	0	0	0	0
Landing Page Submission	Google	No	No	1	2	0	2	0
API	Olark Chat	No	No	0	0	0	0	0
Landing Page Submission	Direct Traffic	No	No	0	0	0	0	0
API	Google	No	No	0	0	0	0	0
Landing Page Submission	Organic Search	No	No	1	1	0	1	0
Landing Page Submission	Direct Traffic	No	No	1	1	0	1	0
API	Organic Search	No	No	1	0	0	0	0
Landing Page Submission	Organic Search	No	No	0	0	0	0	0
Landing Page Submission	Direct Traffic	Yes	No	0	0	0	0	0
API	Organic Search	No	No	1	0	0	0	0
API	Olark Chat	No	No	0	0	0	0	0
API	Referral Sites	No	No	0	0	0	0	0
Landing Page Submission	Google	No	No	1	0	0	0	0
API	Organic Search	No	No	0	0	0	0	0

Prediction Column

Converted Converted

Outcome of Interest

1 Yes





find + create efficiencies

Use AI to spend more time driving performance.

AI won't make your work instantly more efficient. There's a learning curve: time spent exploring tools, refining prompts, and experimenting with outputs. But over time, teams that embrace AI often report meaningful time savings and process improvements.

Our advice: don't start with efficiency as your primary goal, but do track where it's gained. Efficiency is the byproduct of smarter workflows, reduced manual effort, and faster decision-making.

Where we're seeing real efficiency gains:

Faster, smarter analysis

- Replace hours spent wrangling data by using AI to quickly clean, organize and get insight from large data sets
- Use AI to spot areas of opportunity or concern for additional human analysis

Content creation at scale

- Generate first drafts or outlines for landing pages, email content and ad copy
- Ideate key messages based on audience or keyword research

Managing requests and intake

- Use AI to convert raw inputs from stakeholders into structured marketing briefs
- Identify missing information before kicking off a new project with your team

Web Content Inventory Analysis

EXAMPLE 1:

Before: Long, manual spreadsheet reviews of URLs, titles, and traffic data

With AI: AI evaluates page performance, flags duplicative content, and suggests consolidation opportunities

Local SEO Research

EXAMPLE 2:

Before: Manually reviewing competitor listings and Google Business Profiles

With AI: AI compares top local listings, identifies gaps, and suggests optimization strategies





ethics + transparency

Leveraging AI for business necessitates a rigorous commitment to ethics and transparency, ensuring that advancements serve the best interests of both patients and the broader healthcare community. To establish ethical and transparent standards, consider the following five areas.

The Awareness Gap: Healthcare organizations, particularly those skeptical about AI, must recognize that AI's applications extend beyond futuristic concepts and are already embedded in tools they use daily. This awareness can demystify AI, highlighting its potential to enhance operational efficiency, patient care, and marketing effectiveness without compromising ethical standards.

Staying Competitive: The adoption of AI in healthcare is not a fleeting trend but a cornerstone of contemporary and future practices. Leading systems already leverage AI in clinical and marketing domains, driving efficiencies and enhancing patient engagement. Ignoring this evolution can place organizations at a significant disadvantage, underscoring the urgency of integrating AI that aligns with ethical guidelines and patient-centric values.

Ethical and Compliant Utilization: The crux of ethical AI deployment in healthcare marketing lies in its ability to harness data for the genuine understanding and betterment of patient experiences. This involves ethically sourcing and analyzing demographic, lifestyle, and behavioral data to craft marketing messages that resonate with individuals' needs and preferences. For instance, tailoring communications to different age demographics enhances engagement; it serves the vital purpose of making healthcare information more accessible and comprehensible to all patients, thereby contributing positively to public health outcomes.

Targeting with a Purpose: Ethical use of AI enables healthcare marketers to identify and engage high-value patient segments precisely. By analyzing data patterns, marketers can pinpoint individuals at risk of certain conditions and proactively offer relevant information on preventive care. This strategic approach optimizes marketing resources and plays a crucial role in promoting early detection and intervention, ultimately serving the community's health and well-being.

Ethical Considerations and Compliance: Adherence to regulatory standards, such as HIPAA, is central to AI's ethical deployment in healthcare marketing. Beyond legal compliance, ethical marketing strategies necessitate a human-centric approach. This includes content reviews by clinical professionals for medical accuracy and considering the implications of targeting and personalization to ensure they genuinely benefit patients, respect their autonomy, and uphold the highest standards of privacy and consent.



security + privacy

While AI represents innovation, it also raises questions regarding data security, privacy, and regulatory compliance—critical areas in which healthcare marketers must exercise caution and foresight. As you embark on that journey, consider data security, access controls, regulatory compliance, and the tools available to ensure privacy.

Data Security and Anonymization: The cornerstone of leveraging AI in healthcare marketing is the assurance that patient data, often sensitive and confidential, is protected against unauthorized access and exposure. Healthcare marketers must prioritize using AI tools within secure systems, such as ChatGPT Teams or Chat within Azure, designed to safeguard sensitive information from being accessed by unintended parties. If you're not using securing systems, anonymizing data before inputting it into public AI tools ensures that personal identifiers are removed, thus protecting patient privacy while allowing for the valuable insights AI can offer.

Robust Access Controls: Establishing stringent access controls ensure only authorized personnel can view, manage, and modify data and AI models. This involves thoroughly understanding all entities that may have access to the data and implementing measures to restrict access accordingly, safeguarding against internal and external threats.

Regulatory Compliance: Adherence to healthcare privacy regulations, notably HIPAA, cannot be overstated. Compliance ensures that patient data is handled on par with legal and ethical standards, preserving trust and integrity in the healthcare provider-patient relationship.

Emerging Techniques for Data Privacy: Using generative models to create synthetic patient data represents a cutting-edge approach to training AI without compromising real patient information. This method facilitates the development of robust AI models and serves as a safeguard for patient privacy, allowing for innovation without risk.



security + privacy

How to Audit AI Tools

Establish a process for vetting AI tools and create channels for sharing those that have earned the stamp of approval in your organization. As you do, consider:

- **Create a committee:** AI tool vetting should not be a one-team project. Ensure your IT and legal departments have a voice when considering AI adoption in your organization.
- **Understand AI provider transparency:** Carefully choose AI providers by checking their systems' security, certifications, and history of success. The teams creating the AI must prioritize keeping information safe and private.
- **Monitor data integrity and bias:** Carefully assess the data used to train the AI models, ensuring it is as bias-free and representative as possible to avoid biases in the AI outputs.

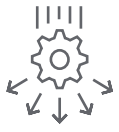
When vetting AI tools, start with these simple questions:

- Will the tool help me achieve my marketing or business goals?
- Does the tool keep my data secure? Ensure the AI tool will not use your data to train their models!
- What type of data do I need for the tool, and is this data HIPAA compliant?
- What is the tool's scalability, and will it serve my full team and stakeholders?
- What is the potential value created by this tool?
- Do you know how the tool uses your data—and whether you have the option to delete it permanently?



Jay Ketchaver
SENIOR MANAGER,
IT + SECURITY

“Make sure you thoroughly vet the tool's security and privacy capabilities. Don't assume it's secure and will keep your data safe. Having the ability to require the tool to permanently delete your data is important as well.”



use cases + tools

If you're still trying to understand how AI can help, ask yourself if you've faced any of the following challenges. These represent specific use cases we've encountered through our work with clients. In each, we've collaborated on AI workflows to address the constraint.

Thought starters:

"I need to better understand my audience to improve my messaging and targeting strategies"	"I'm trying to plan my marketing strategy for next year, but I don't know what worked well this year"
"I have data from our marketing initiatives and data related to patient acquisition, but I'm not sure how to connect the dots between them"	"I want to deliver more personalized messages to prospective patients, but my creative resources are already maxed out"
"I need to translate the reports I'm getting from my agency into meaningful insights for internal stakeholders, but I don't have a lot of time to spend on it"	"I know our market is becoming increasingly competitive, but I'm having a hard time keeping up with our competitors' updates and changes in strategy"

Tools We Use Every Day for Use Cases Like Those



Akkio: A Generative AI for analytics and predictive modeling, Akkio allows users to chat with their data, rapidly generate insights, create visualizations in real-time, and make accurate predictions based on past results.



ChatGPT: Fathom's Team subscription gives us additional collaboration and security features that allow us to safely engage with ChatGPT on behalf of our healthcare clients. OpenAI continues to release new models and capabilities that make ChatGPT even more powerful and practical for marketers. Deep Research, projects and custom GPTs are some of our favorite tools.



Claude: A LLM built by Anthropic that routinely rivals Open AI's models for the top spot in AI leaderboards. While it offers similar functionality as ChatGPT, some feel that Claude performs better with complex reasoning tasks and can offer more thorough and well-formatted responses.



Copilot: Organizations already embedded in Microsoft's suite of solutions will benefit most from Copilot. Copilot levels up your everyday experiences in Word, PowerPoint, Excel and more with robust AI capabilities and agents designed to help you save time and work smarter.



Descript: If you're looking to efficiently edit video and audio content to support different ad formats or use cases, you need to try Descript. This AI-powered tool allows you to edit assets using natural language, making it easy to get more use and better results out of your creative.



Perplexity: Advances in Google's AI Overviews and ChatGPT's search functionalities have just about eclipsed Perplexity in our minds. While research is still one of our biggest AI use cases, our tool set has evolved as more technology has been made available.



prompt library

As you explore AI applications, the ability to craft effective prompts becomes a vital skill. Prompting is not just about giving instructions to AI—it's about enhancing your team's capacity to leverage AI for better outcomes. By mastering the art of prompting, you unlock AI's potential as a powerful collaborator that amplifies strategic and creative efforts.

As a starting point, get to know the core rules of prompting. These foundational principles will ensure success regardless of the outcome you're trying to engineer. Over time, you'll become a more efficient and effective user of AI, which, in turn, will allow you to create more value with the tools.

Core Prompting Rules

Mastering the art of prompting is crucial to effectively harnessing AI in marketing. By following these three core rules, you can ensure that your AI tools deliver the most accurate and valuable outputs.



BE CLEAR

Defining exactly what your goal is, what kind of output you'd like and what format you want that output in will set you up for success. When you're getting started, try to first focus on what you want AI to do rather than how you would do it. Clarity combined with a little bit of leeway gives AI the flexibility to do its best work.



PROVIDE CONTEXT

When proper security protocols are in place, feel free to attach documents and provide other background information to help AI work within your context. You can also have AI teach itself by first prompting it to conduct some research on the web, just make sure you monitor its findings for accuracy to avoid errors later on.



ITERATE AND REFINE

Prompting is evolving as AI models become more advanced. If you're new to using AI, we recommend starting simple with your prompt and leaning on AI to help you refine your ask further. There is always room to refine your inputs and tell AI to give it another try.



prompt library

Prompt Examples

Effective prompts are the foundation of successful AI interactions. By clearly defining your objectives, assigning specific roles, and providing detailed context, you can guide AI to deliver insightful and actionable outputs. Below are examples of prompts tailored to everyday healthcare marketing tasks, showcasing how to apply these principles to achieve optimal results.

	DEVELOPING CONTENT FOR A WEB PAGE	CONDUCTING COMPETITIVE RESEARCH	ANALYZING TRENDS IN SERVICE LINE PERFORMANCE
BE CLEAR	Help me write content for a new cardiology landing page focused on atrial fibrillation. I need a strong headline, short intro paragraph, 3 benefit bullets, and a call-to-action.	Summarize how our top 3 competitors X, Y and Z are positioning their maternity care services. Include their unique value props, tone of voice and common keywords used.	Review this spreadsheet of performance data for our oncology service line and identify key trends in patient acquisition and referral volume.
PROVIDE CONTEXT	The audience is adults 60+ in the Midwest looking for specialized heart care. The page should match the tone of this page we recently created for heart failure.	We're re-doing content for our women's health service line and want to ensure it is differentiated from competitors and that our value props stand out in the market.	Our goal is to understand what's driving growth and what's not to guide next year's budget allocation. Here are some insights from the analysis we conducted last year as an example.
ITERATE + REFINE	Make the tone more conversational and gear the content toward first-time patients	Please highlight specific gaps we can capitalize on and suggest types of content we can use to best communicate that information.	Summarize your findings in a 3-bullet executive summary that we can share with oncology leadership.



AI patchworks











For any job, the right tools are essential. And how you use them is what truly drives success. When applying AI tools to our marketing work, we consider patchworks. Patchworks are flexible combinations of tools and solutions tailored to our existing and proven processes. Patchworks are effective for a few reasons.










First, the expectation is that patchworks will change as new and better tools emerge. Second, patchworks are built around your existing and proven processes. Tools take time and energy to learn, so building around existing processes removes some of the cognitive load required in transition. Finally, and maybe most critically, a process-first approach allows you to select the best tools for the job—instead of developing the proper process for the tool. In short, a patchwork approach helps you and your team spend more time maximizing the value you're creating through the adoption of AI tools and less time documenting the process updates required for consistent adoption.

For example, let's start with something as simple as meetings.

Love them or hate them, meetings are essential to business. However, the requirements of an effective meeting—an agenda, clear notes, prompt follow-up, and specific next steps—require time and effort that prevent at least one person's entire presence and engagement. To address this, we developed a patchwork workflow to ensure all team members could be present in meetings, spending less time summarizing conversations and more time maximizing results.

As we illustrate in this example, we've already updated our patchwork based on exploring new tools with specific strengths. The high-level process we follow to ensure an effective meeting has stayed the same. We've removed significant manual work from the in- and post-meeting process while minimizing new learning and bringing more consistency to operations.

ORIGINAL PATCHWORK					
steps to take					
1	meet				
2	take notes				
3	summarize notes				
4	share notes				
5	support understanding				

UPDATED PATCHWORK				
steps to take		 FATHOM	 zoom	
1	meet			
2	take notes			
3	summarize notes			
4	share notes			
5	support understanding			

Fathom AI Notetaker is unaffiliated with our agency.



resources

Whether you're interested in learning more or want to invite your team on a journey to understand the possibilities presented by AI, we recommend the following courses, thought leaders, and events as a starting point.

Stay Ahead: Essential AI Resources

PODCASTS



Google DeepMind

Level Up: AI Education + Certification Programs

BEGINNER + INTERMEDIATE



NEWSLETTERS



EVENTS

MAICON | Marketing Artificial Intelligence Conference
More Intelligent. More Human.™

HubSpot Academy

aws

LinkedIn Learning

Grow with Google

ARTICLES

TC TechCrunch

techradar



DeepLearning.AI

coursera



glossary of terms

The following definitions encompass a broad spectrum of AI capabilities, from the theoretical aspiration of AGI, through the practical applications of LLMs, to the creative potential unlocked by Generative AI technologies. These concepts are pivotal in understanding the current landscape and future possibilities of artificial intelligence.

Algorithm: A set of rules or instructions given to an AI system to help it learn from data and make decisions or predictions based on it.

Artificial General Intelligence (AGI): A level of AI capable of performing any intellectual task that a human being can, with the ability to learn, understand, and apply knowledge across different contexts.

Artificial Intelligence (AI): A field of computer science dedicated to creating systems capable of performing tasks that typically require human intelligence, such as learning, decision-making, and language understanding.

Chatbots: Computer programs that simulate human conversation through voice commands or text chats, using natural language processing (NLP).

Computer Vision: An AI field that enables computers and systems to derive meaningful information from digital images, videos, and other visual inputs and take action or make recommendations based on that information.

Data Mining: The process of discovering patterns and knowledge from large amounts of data. The data sources can include databases, data warehouses, the Internet, and more.

Deep Learning: An ML technique that teaches computers to learn by example, a key technology behind driverless cars, facial recognition, and more.

Generative AI (GenAI): AI systems that create new content, such as text, images, or music, based on learning from vast datasets, producing novel outputs that mimic the learned material.

Hallucination: When an AI model produces information that sounds plausible but is false or unsupported by facts. This often happens when the model lacks accurate data or is asked questions outside its training scope.

Large Language Model (LLM): AI models trained on extensive text data to understand and generate human language, capable of tasks like writing, summarizing, and translating.

Machine Learning (ML): A subset of AI that involves the development of algorithms and statistical models that enable computers to perform specific tasks without using explicit instructions, relying instead on patterns and inference.

Natural Language Processing (NLP): A branch of AI that helps computers understand, interpret, and respond to human language in a valuable way.

Neural Networks: Computational models inspired by the human brain's structure and function, used in machine learning to analyze data and recognize patterns.

Predictive Analytics: The use of data, statistical algorithms, and machine learning techniques to identify the likelihood of future outcomes based on historical data.

Prompt engineering: The process of crafting clear, structured inputs (prompts) that guide an AI model to generate useful, relevant outputs.



AI adoption checklist

Approach AI integration clearly, employing a strategic approach to AI adoption to ensure a structured and goal-oriented path. This checklist can serve as a starting point for your plan.

1. CREATE A BASELINE

- **Assess Your Starting Point:** Understand your organization's current engagement with AI at a personal and professional level. This helps you recognize existing capabilities and attitudes toward AI adoption.

2. EVALUATE AI READINESS AMONG YOUR TEAM

- **Personal and Professional Use of AI:** Investigate how team members use AI in their daily routines and work processes.
- **Interest in AI:** Gauge the team's enthusiasm for AI technologies to identify potential AI advocates.
- **Review Existing Tools:** Examine current technologies for AI functionalities already in use.

3. SET CLEAR AND ACHIEVABLE GOALS

- **Identify Challenges and Opportunities:** Analyze your team's strengths and areas for improvement with respect to AI.
- **Focus on the Problem, Not the Technology:** Begin with the issues you aim to address rather than jumping to potential AI solutions.
- **Anticipate AI's Impact:** Consider how AI can transform your identified challenges and opportunities.
- **Short-term Milestones:** Define what success looks like in 90, 180, and 360 days.

4. EDUCATE AND EMPOWER YOUR TEAM

- **Provide Learning Resources:** Share curated educational materials and encourage your team to utilize them.
- **AI Certification for Champions:** Have AI enthusiasts on your team achieve certification to lead by example.
- **Foster a Collaborative Learning Environment:** Dedicate time for team members to explore AI technologies together.
- **Stay Informed:** Sign up for updates in the AI field to keep abreast of new developments.
- **Inform Stakeholders:** Develop and schedule presentations to educate key collaborators outside the marketing team like physicians and clinical chairs. Consider inviting these stakeholders to your AI council.

5. IDENTIFY AND PRIORITIZE AI OPPORTUNITIES

- **Focus on a Single Area:** Based on your goals, choose one specific area to implement AI first to maximize impact and manage resources effectively.

6. PLAN YOUR PILOT PROJECT

- **Tool Selection:** Decide which AI tool or platform will be utilized.
- **Success Metrics:** Establish clear criteria for measuring the pilot's success.
- **Team Involvement:** Define roles and responsibilities for team members participating in the pilot.
- **Data Requirements:** Identify the data needed to support your AI initiatives effectively.