

CASE STUDY

Fixing the Funnel

How Better Patient Experiences Drove 50% More Surgeries and Doubled Engagement

A complete rebuild of how patients discover, trust, and move through care — from first click to lasting change.



BACKGROUND

When I joined Salem Health's Bariatric Surgery Clinic, the program had excellent clinical outcomes but struggled to grow. Patients were starting the process but rarely making it to surgery.

At the same time, the clinic faced a perception problem. Many residents in the Salem area viewed Portland hospitals as bigger, more advanced, and more trustworthy. Clinic leadership and I suspected we were losing prospective patients north.

My goal was to reverse that trend—elevate the clinic's credibility, simplify the patient experience, and turn interest into action.

CHALLENGE

The patient journey was confusing and inefficient from the start.

When someone expressed interest in bariatric surgery, staff mailed them a thick packet of mixed materials—forms of different sizes, brochures from various organizations, and no consistent branding. Each packet had to be assembled by hand.

Many patients never returned the forms, or sent them back incomplete. Staff then mailed another partial packet, wasting time, money, and effort.

Meanwhile, the website was outdated and text-heavy, lacked mobile functionality, and didn't reflect the quality of care offered. With no online intake process and minimal advertising, potential patients often never reached the clinic at all.

Designing a Better Experience

OBJECTIVES

1. Simplify and modernize the patient journey.
2. Reduce mailing costs and staff workload.
3. Strengthen brand credibility and digital visibility.
4. Increase qualified leads and surgical conversions.
5. Improve post-surgery engagement and long-term retention.

Clarity

- Redesigned website navigation
- Launched bilingual content
- Simplified forms

STRATEGY

The strategy centered on clarity, credibility, and consistency.

Clarity: Simplify the process and make every step transparent.

Credibility: Modernize the digital experience to match Portland-level competitors.

Consistency: Ensure every touchpoint—from website to waiting room—felt unified and trustworthy.

To achieve this, I led a full-funnel transformation combining website rebuilds, SEO optimization, bilingual content, educational resources, and digital advertising.

Credibility

- Improved visual design
- Added patient testimonials
- Strengthened SEO.

Consistency

- Unified messaging
- Created digital assets for staff
- Built analytics dashboard

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Bringing the Plan to Life: Part 1

ACTION

Rebuilt the Digital Experience

I completely redesigned the bariatric surgery website to reflect Salem Health's professionalism.

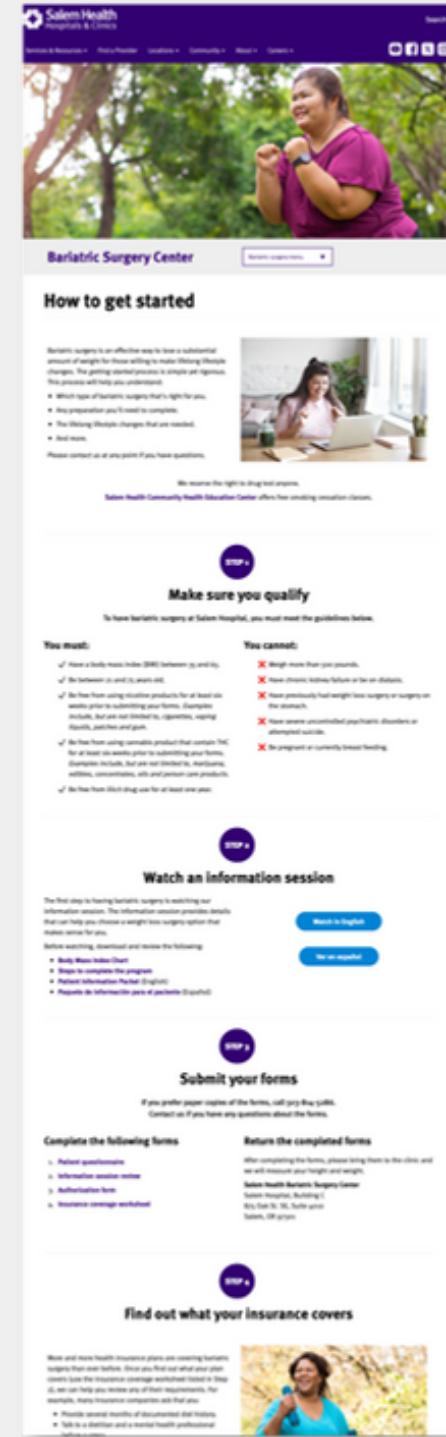
- Introduced modern navigation, simplified layout, and clean visuals.
- Rewrote all copy in plain, empathetic language.
- Made the site fully mobile-friendly and optimized for search.
- Created Spanish-language versions of every page to better serve bilingual patients.

Created a Guided 5-Step Journey

To replace the paper packet system, I designed a clear “Getting Started” page outlining a five-step process—from qualification to form submission.

- Step 3 (“Submit Your Forms”) featured fillable PDFs patients could type into and mail for HIPAA compliance.
- Forms were organized by purpose and accompanied by plain-language instructions.
- The page also lists qualifications and disqualifications, allowing ineligible patients to self-screen.

Incomplete submissions dropped to nearly zero, while staff regained hours each week that had been spent compiling and mailing packets.



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Bringing the Plan to Life: Part 2

Developed Comprehensive Education Materials

Working with clinical staff, we built two key downloadable resources:

- Patient Information Packet (24 pages) – Consolidated clinic details, expectations, and forms.
- Nutrition Manual (75 pages) – Complete pre- and post-surgery dietary guide.

Both were available in English and Spanish and designed with consistent branding, helping unify the clinic's educational voice.

Elevated the Clinic & Salem Health Brand Everywhere

- Introduced a cohesive design system across all materials.
- Directed creation of branded slideshow graphics for the waiting-room monitor, reinforcing the digital look and feel in-person.
- Published three detailed patient success stories (video, photos, written narratives) that built trust and demonstrated real outcomes.



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Bringing the Plan to Life: Part 3

Expanded Awareness with Advertising

To drive awareness and fill the funnel, I launched top-of-funnel Google and Meta ad campaigns focused on education and success stories.

- Optimized search keywords and ad landing pages.
- Integrated SEO and Google My Business to capture local traffic.

After several months, ad performance was strong enough that leadership asked to pause campaigns—the clinic had reached full new patient capacity.



Testing Awareness Channels: Spotify & Pinterest

I launched Spotify and Pinterest ads highlighting family energy and everyday life to make bariatric surgery feel approachable.

Engagement was strong, but conversions were low due to linking ads to the main website instead of a lifestyle-focused page.

Insight from this test guided future ad spend toward Meta and Google campaigns with optimized landing pages.

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Bringing the Plan to Life: Part 4

Improved Post-Surgery Engagement

Support-group participation had been inconsistent, with reminders buried in staff Outlook emails. I moved all communications to Mailchimp and created a reliable, branded monthly email.

- Included meeting topics, facilitators, and photos to make sessions approachable.
- Standardized meeting cadence (1st, 2nd, and 4th Tuesdays/Thursdays) for predictability.
- Added the sign-up form, schedule, and printable flyer to the website.

Attendance doubled within months, strengthening patient relationships and long-term satisfaction.



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Bariatric Surgery Support Groups



Psychology topics
Second Tuesday of each month
6:30 - 8 p.m.
Discuss a variety of topics from mindfulness, emotional eating, triggers, stress and more! Learn strategies to help you reach your health goals.

[Learn more](#)

Special guests, various topics and activities
Third Thursday of each month
6:30 - 8 p.m.
Join us for Q&As with staff, walking group, discussions about what to expect before and after surgery, and more! Visit our website for more details.

All patients are invited to join before and after their surgery.

How to join online meetings
Our online meetings take place using Microsoft Teams. Download and join the meeting via the Teams app or join the meeting online.

Our Teams meeting ID and passcode is the same for every meeting.
 • Meeting ID: 273 871 429 165
 • Passcode: f2BPhl

[Join on the Teams app](#) [Join on the web](#)

In-person meetings
Our in-person meetings take place at Salem Hospital. Parking is available under Building C or in the parking garage.

Si necesita un intérprete
Si necesita intérprete, comuníquese con la clínica una semana antes para indicarnos a qué grupo desea asistir.

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RESULTS

- 50% increase in surgeries within nine months.
- Support-group participation doubled.
- Incomplete form submissions near zero.
- Mailing and administrative costs reduced dramatically.
- Advertising and SEO filled the patient pipeline to capacity.
- Improved brand perception and community trust—the clinic now viewed as a modern, patient-first leader in the region.

LESSONS & IMPACT

This project became far more than a marketing initiative. By reimagining how the clinic communicated, educated, and supported patients, we removed barriers at every stage of the journey.

The result was a true transformation—one that blended marketing, design, and operations into a seamless experience that made care more accessible and trustworthy.

For me, it reinforced a core belief: in healthcare, **clarity is care**. When you make information simple, compassionate, and consistent, everything else—trust, growth, and results—naturally follows.