

Collin Nelson

STRATEGY · STORYTELLING · IMPACT

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.



Project at a Glance

- 50% increase in surgeries within nine months
- Support-group participation doubled
- Incomplete form submissions dropped to near zero
- Mailing and admin costs reduced dramatically
- Advertising + SEO filled the patient pipeline to capacity

ORGANIZATION

Salem Health Bariatric Surgery Clinic

MY ROLE

Marketing project lead (strategy, content, web, ads, materials)

FOCUS

Patient journey redesign, credibility lift, lead-to-surgery conversion

CHANNELS/TOOLS

Website + SEO, bilingual content, Google + Meta ads, Mailchimp, analytics

FIXING THE FUNNEL

Part 1 | Background

The patient journey was confusing and inefficient from the start. When someone expressed interest in bariatric surgery, staff mailed a thick packet of mixed materials – forms of different sizes, brochures from different 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Meanwhile, the website was outdated and text-heavy, lacked mobile functionality, and didn't reflect the quality of care offered.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.



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.

Part 2 | Strategy & Hypothesis

Core belief

In healthcare, clarity is care. When information is simple, compassionate, and consistent, trust grows and action follows

Strategy

The strategy centered on three ideas: clarity, credibility, and consistency. The work was a full-funnel transformation combining website rebuilds, SEO optimization, bilingual content, education resources, and digital advertising.

Clarity

- Redesigned website navigation
- Launched bilingual content
- Simplified forms

Credibility

- Improved visual design
- Added patient testimonials
- Strengthened SEO

Consistency

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

Taking action

To reach my objectives while following my strategy, the next steps forward were big, yet important. I didn't want to create a quick solution that would require another big investment soon. I wanted to create impactful, lasting change. The following actions would create that change.

ACTION 1

Rebuild the digital experience

Before the redesign, the bariatric surgery website felt outdated and disconnected from how patients actually made decisions. Important details were buried under long paragraphs, and the site lacked a clear way to move from interest to action. Analytics showed high bounce rates on key informational pages and little engagement with conversion points such as seminar sign-ups and consultations. The digital journey didn't match the emotional and practical steps patients were taking offline, making it harder for them to take the next step with confidence.

I rebuilt the journey around patient needs and questions. The site now guides people through simple steps—check eligibility, watch the info session, and see what to do next. I created a resources page for both pre- and post-surgery patients, set up easy access to support groups, and rewrote FAQs in plain language so patients can move from “curious” to “ready” with confidence. I also aligned messaging with patient motivations gathered from surveys and staff feedback, ensuring the site felt human and trustworthy.

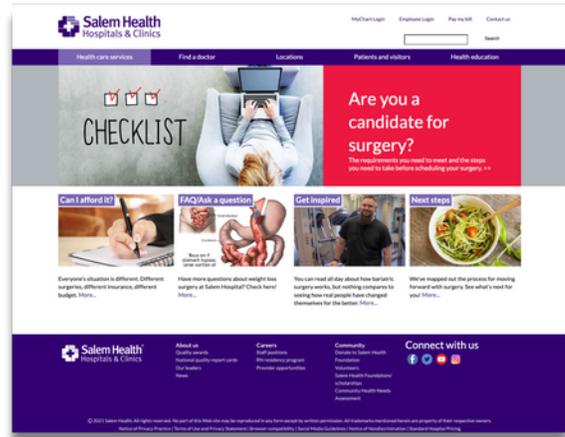
Each change was deliberate, reduced friction, and made the next step obvious.

FIXING THE FUNNEL

Part 3 | Execution

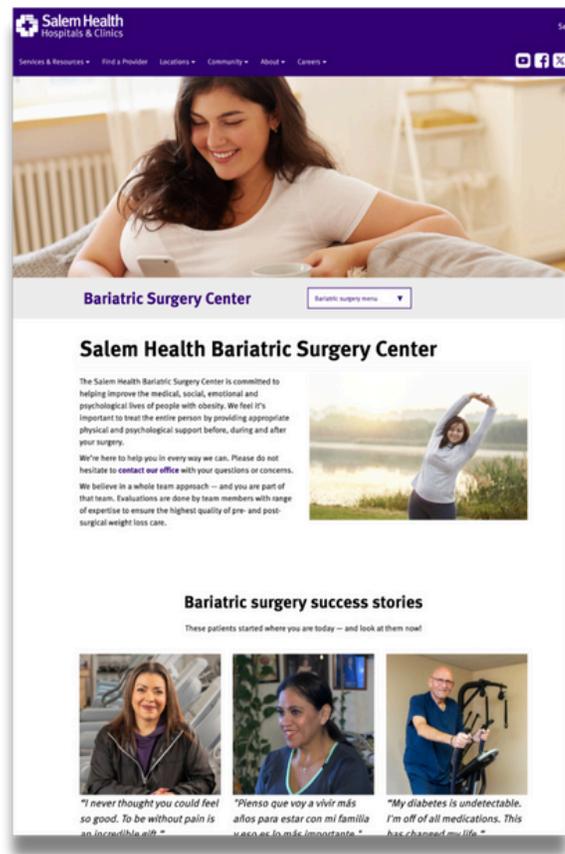
Old homepage

- Cluttered layout: Competing boxes and colors make it hard to follow a clear journey.
- No hierarchy of actions: Users don't know where to start — multiple "More..." links cause confusion.
- Outdated visuals: Stock-style imagery (e.g., checklist, stomach diagram) feels impersonal and clinical.
- Lack of story or emotion: No real patient stories or visual warmth; doesn't inspire trust or motivation.
- Poor mobile experience: Multi-column grid and heavy text don't scale well.
- Weak conversion path: No clear funnel toward consultation, seminar signup, or contact form.



New homepage

- Streamlined navigation: Clear single journey from awareness → eligibility → action.
- Human-centered design: Real patients, video stories, and lifestyle imagery replace stock visuals.
- Emotional connection: Motivational messaging ("real stories," "start your journey") drives engagement.
- Modern layout: White space, consistent color palette, and scannable sections improve readability.
- Mobile-first design: Responsive structure with strong CTA visibility across devices.
- Conversion optimization: Simplified paths for "Take the quiz," "Attend a seminar," or "Contact us."
- SEO & accessibility: Updated page titles, headers, and alt text improved search visibility and ADA compliance.



FIXING THE FUNNEL

Part 3 | Execution

ACTION 2

Create a guided 5-step onboarding journey

Onboarding was the real bottleneck. The clinic asked for “more patients,” but the bigger issue was people getting stuck or dropping off before they ever submitted everything. After we launched this 5-step flow, incomplete submissions dropped to nearly zero, and staff got back hours each week that had been spent chasing paperwork.

Step 1: Check eligibility

Start with clear requirements so people know right away if this is a fit and what to do next.

Step 2: Watch the info session

Replace the monthly in-person session with an on-demand video that’s easy to understand and available anytime.

Step 3: Submit forms (all in one place)

Consolidate scattered forms into a single hub so patients and staff aren’t hunting things down.

Step 4: Understand insurance coverage

Make costs and coverage a required step so fewer people move forward with confusion or surprises.

Step 5: Complete a screening call

Set the expectation for a clinic call, but only after Steps 1–4 are done, so calls are higher-quality and more productive.

The screenshot displays the website for the Bariatric Surgery Center at Salem Health. The page is titled "How to get started" and outlines a 5-step process:

- STEP 1: Make sure you qualify**
To have bariatric surgery at Salem Hospital, you must meet the guidelines below.
You must:
 - Have a body mass index (BMI) between 35 and 45.
 - Be between 21 and 75 years old.
 - Be free from using nicotine products for at least six weeks prior to submitting your forms. Examples include, but are not limited to, cigarettes, vaping liquids, patches and gum.
 - Be free from using cannabis product that contain THC for at least six weeks prior to submitting your forms. Examples include, but are not limited to, marijuana, edibles, concentrates, oils and person care products.
 - Be free from illicit drug use for at least one year.**You cannot:**
 - Weigh more than 500 pounds.
 - Have chronic kidney failure or be on dialysis.
 - Have previously had weight loss surgery or surgery on the stomach.
 - Have severe uncontrolled psychiatric disorders or attempted suicide.
 - Be pregnant or currently breast feeding.
- STEP 2: Watch an information session**
The first step to having bariatric surgery is watching our information session. The information session provides details that can help you choose a weight loss surgery option that makes sense for you.
Before watching, download and review the following:
 - Body Mass Index Chart
 - Steps to complete the program
 - Patient Information Packet (English)
 - Paquete de Información para el paciente (Español)Buttons: [Watch in English](#), [View in español](#)
- STEP 3: Submit your forms**
If you prefer paper copies of the forms, call 503-814-5286. Contact us if you have any questions about the forms.
Complete the following forms
 - Patient questionnaire
 - Information session review
 - Authorization form
 - Insurance coverage worksheet**Return the completed forms**

After completing the forms, please bring them to the clinic and we will measure your height and weight.

Salem Health Bariatric Surgery Center
Salem Hospital, Building C
875 Oak St., SE, Suite 0100
Salem, OR 97301
- STEP 4: Find out what your insurance covers**
More and more health insurance plans are covering bariatric surgery than ever before. Once you find out what your plan covers (use the insurance coverage worksheet listed in Step 2), we can help you review any of their requirements. For example, many insurance companies ask that you:
 - Provide several months of documented diet history.

FIXING THE FUNNEL

Part 3 | Execution

ACTION 3

Develop patient information materials

Patient Information Packet

24 pages

The Patient Information Packet was designed to guide prospective and current patients of the clinic through every stage of their journey. It uses accessible language and visuals, helping patients understand treatment options, risks, and post-surgery commitments. The packet also includes a timeline so patients know exactly what to expect and how to prepare. My role focused on restructuring the content flow, creating bilingual layouts, and collaborating with the internal team to align style and patient-centered messaging.

Nutrition Manual

24 pages

The nutrition manual supports patients through each stage of their weight-loss journey, offering clear dietary milestones, nutrient checklists, and practical tips for everyday eating. It contains actionable and easy-to-follow steps. Color-coded sections cover pre-surgery preparation, post-operative eating phases, and lifelong nutrition habits. My role involved streamlining content flow, simplifying visuals, and structuring the guide so patients feel confident, informed, and supported every meal of the way.



FIXING THE FUNNEL

Part 3 | Execution

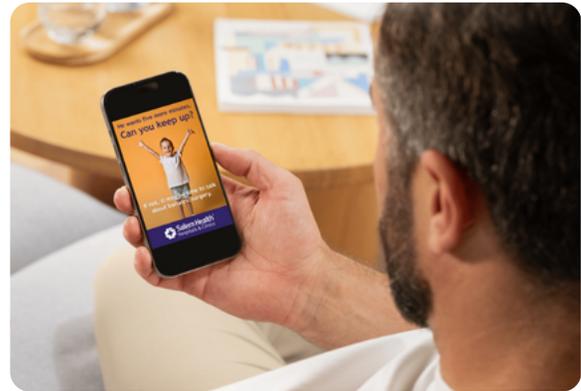
ACTION 4

Expand 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.

1. Optimized search keywords and ad landing pages.
2. 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.



FIXING THE FUNNEL

Part 3 | Execution

ACTION 5

Improve 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.

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

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



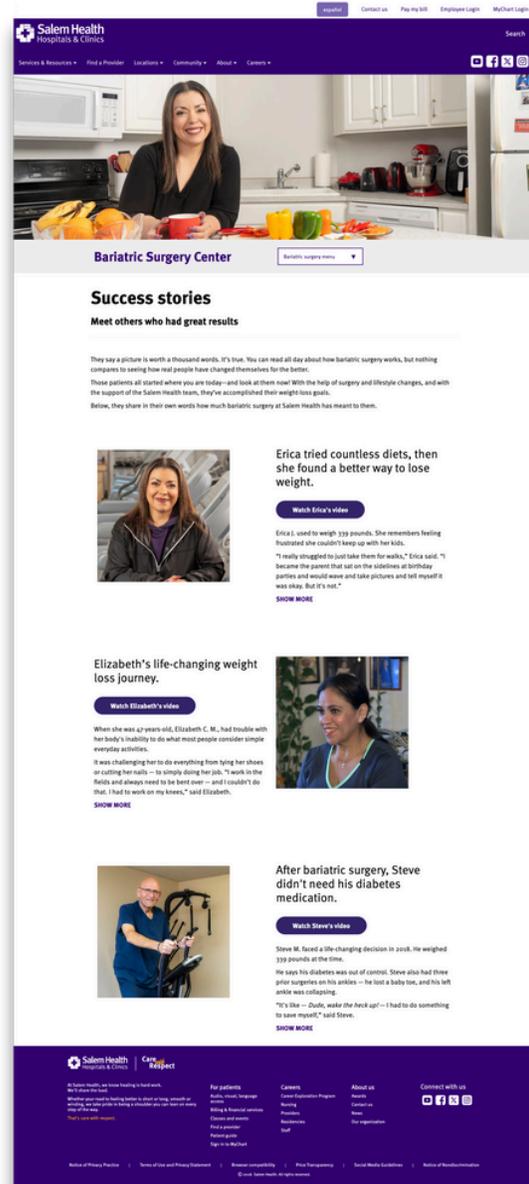
FIXING THE FUNNEL

Part 3 | Execution

ACTION 6

Elevate the brand everywhere

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



Within 9 Months...

50%

Increase in
Completed
Surgeries

2X

More Support
Group Participation

~0

Incomplete Form
Submissions

Additional Wins

- Mailing and administrative costs reduced dramatically.
- Advertising and SEO filled the patient pipeline to capacity.
- Brand perception improved — the clinic became viewed as modern and patient-first in the region.

Lessons & Impact

This became 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 that blended marketing, design, and operations into a seamless experience that made care more accessible and trustworthy.

It reinforced a belief I still carry: in healthcare, clarity is care. When information is simple, compassionate, and consistent, trust, growth, and results naturally follow.