MERLIN
The Sales and Marketing SaaS Platform Developed Exclusively for Ambulatory Surgery Centers
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Embracing sales, marketing, and communication is central to achieving the staffing and operational goals and growth objectives of ASCs.

However, many lack the time and resources needed to build a brand and put in place sustainable B2B and B2C marketing, sales, and communication plans.

MERLIN is designed to provide access to world-class content and a digital creative platform with hands-on support.

Built around a SaaS platform, MERLIN’s advisory experts in sales, marketing, and communication provide members’ guidance, alongside optimized digital tools and templates, to simplify building a stronger referral network, team, and reputation.
OBJECTIVES

+ Drive Sales
+ Contain Costs
+ Nurture Growth
+ Enhance Experience
+ Improve Care
WHY MERLIN
The demand for a membership-based SaaS platform will increase as healthcare transitions from sick to value-based care, analog to digital, and from hospital to ambulatory centers.

These on-going transitions highlight the importance of having a robust referral network, supported by marketing, sales, and communication efforts.

**MERLIN**

MERLIN was created specifically for ASCs

Our experience working with clients has taught us that brand building, communication, sales, and marketing in healthcare lag other business and service sectors.

Reasons include the fragmented healthcare landscape, digital transformation occurring at different rates of adoption, the move to population health, evolving consumer expectations, an aging population, and a growing need to focus on the patient experience.

ASCs are not exempt from these market forces, which is why we are introducing a SaaS platform that combines content, digital tools, and templates with hands-on support to help them meet the business and marketing challenges facing the sector.
II

MERLIN

MEMBERSHIP

& SUPPORT
Memberships

ASC staff members are experts in what they do.

The features, functions, and support MERLIN provides includes the educational, marketing, and communication tools they need to become the best marketers and brand ambassadors possible.

Basic Membership includes offerings that address:

MERLIN BASIC MEMBERSHIP

EDUCATION
People + Performance

MARKETING
Growth + Value

Enhanced Membership includes everything in the Basic Membership, plus advisory services for an additional fee, that offer:

MERLIN ENHANCED MEMBERSHIP

CONSULTING
Strategy + Creative + Execution
Support Services

MERLIN combines on-demand brand, marketing, and sales tools with professional support services to aid with:

+ Recruitment advertising and media planning
+ Brand, content, and design strategy and execution
+ Digital marketing, planning, and execution
+ Referral network optimization
+ Video content development and production
+ Thought leadership and related speech writing
MERLIN PLATFORM
Purpose-built for Ambulatory Surgery Centers, the MERLIN SaaS platform improves marketing, sales, and communication, while helping to recruit and retain the best talent.
Does MERLIN offer integration options, to share data with other online apps or services I use?
Yes. MERLIN features an API which can be used to build custom data integrations as needed.

Does MERLIN install software on my computer?
No, MERLIN is an online service and is accessed through a Web browser, like any other web site or service you might use.

With MERLIN, do I need to have other marketing or design applications like Photoshop or Creative Cloud?
In most cases, no. With MERLIN, you create and customize marketing materials from inside your Web browser. You can even create materials on your phone. You can certainly use other applications alongside MERLIN, but they aren’t required.

Do we need to know graphic design to use MERLIN?
No, MERLIN’s templates are very simple to use and handle all of the creative design for you. You provide the relevant details about your ASC. After a few simple clicks and choices, MERLIN provides high-quality materials ready for distribution.

Does MERLIN replace my clinic’s website or my social media feeds?
No, your Web site and social feeds won’t change. MERLIN is a separate resource, to help you find ways to improve aspects of your Web site and social media, providing resources you’ll need to implement in your Web site or social media tools directly.

We partner with a local marketing and design agency for our marketing and Web site. Can they use MERLIN?
Absolutely, you can invite any external partners, vendors, or other support people to use MERLIN to help your business. It’s a great way to share things like logos, brochures, pre- and post-op instructions, and other materials that all of these partners might need while they work with you. You can also assign special permissions, so these external users only see the materials you want them to see. And you can monitor who is using MERLIN and adjust access accordingly.
Benefits

MERLIN’s on-demand brand, marketing, and sales tools combined with hands-on support services help:

+ Meet increasing competition
+ Attract new talent and patients
+ Lower cost-per-patient acquisition
+ Increase staff retention rates and pride
+ Grow the referral network
+ Create tangible value by maximizing intangibles
+ Maximize facility utilization
## Media Type and Channels

### EXTERNAL MARKETING

**Planning**
- Marketing Audit
- Budget
- Communications and Media Schedule
- Editorial Schedule

**Campaigns**
- Print Ads
- Digital/Banner Ads
- Employee Recruitment Ads
- Professional Referral Outreach Efforts

**Out of Door**
- Billboards
- Bus Stations
- Other

**Environmental**
- Posters
- Interior Signage
- Exterior Signage
- Vehicles
- Counter Displays
- Counter Cards
- Frame Easels
- Digital Displays
- Window Graphics

**Direct**
- Text Messages
- Newsletters
- E-mail updates and announcements

### Social
- Social Media (LinkedIn, Instagram, etc.)
- Public Relations / Earned Media
- Video

### Sponsorships
- Professional Affiliations
- Community Relations

### INTERNAL MARKETING

**Staff On-Boarding**
- Email Signature Templates
- Training and Education
- Patient Experience

### SALES

- Collateral System (brochures, fact sheets, trifolds)
- Benefits
- FAQs
- PowerPoint
- Conferences/Events
- Trade Shows
- Referral Network and Partnerships

### WEBSITE AND APP

- Audit and Analysis
- New Content
- New Design
RESEARCH
+ Market Research (Qual and Quant)
+ Patient Satisfaction Survey
+ Employee Satisfaction Survey

STATIONARY
+ Business Cards
+ Letterhead
+ #10 Envelopes
+ #10 Window Envelopes
+ Notecards
+ Notepads Name
+ Tags/Badges
+ Invitations

FORMS
+ Referral Form
+ Employment Application Form
+ Hiring Documents
+ Patient Consent Agreement
+ Patient Assessment Form
+ Patient Disclaimer
+ Physician Orientation

APPAREL
+ Polos
+ Scrubs
+ Fleeces

PROMOTIONAL ITEMS
+ Fleeces
+ Blankets
+ Stainless Steel Vacuum Flasks
+ Silicone Smart Wallets
+ Lip Balm
+ Tote-bags
+ Pens
+ Refrigerator Magnet
+ Hand Sanitizer
+ Stickers
+ Lanyards
+ Lunch Bags
+ Key Chains
+ Notebooks
+ Post-it Notes
Membership FAQs

What does a MERLIN subscription include?
It depends on the type of membership and the capabilities of your internal team, if you have one.

Is a MERLIN membership enterprise-based, or on a per user basis?
Based on its size, there will be different membership plans for an ASC staff to chose from.

What if help or coaching is needed on how to use the tools and assets found on MERLIN?
Membership comes with three free hours of consultation each month, via a virtual online help desk. Via web conference or phone call, an expert can guide you through the process and address your questions.

Will there be menu of content and creative concepts to choose from related to sales and marketing materials?
Yes, and they will be refreshed periodically on an established editorial and creative schedule.

Why are MERLIN and its support services being launched now?
The time is now to meet this moment in healthcare.

We have consulted in the healthcare brand and marketing world for 20 years. Like healthcare itself, a lot has changed when it comes to marketing and communications.

More ASCs mean more competition, more consumer demand, higher expectations, and a desire for patients to know more and enjoy frictionless experiences. MERLIN can help.

Am I locked in to MERLIN for a long period of time?
No, but we know an annual commitment provides the best value, giving you access to the most resources and support for the lowest cost. We always recommend using MERLIN for a 12-month initial period, to learn and apply as much as possible to jumpstart your marketing. After that, you can cancel your subscription at any time with 90 days notice. Quarterly programs are also available.
TEAM
Ron founded Infinia in 2003 and has long believed in branding as a critical tool to advance organizational change, innovation and growth.

Clients agree: he’s nurtured key relationships at AICPA, tdf, Bank of America, Rutgers Health, Florida Blue, Wellforce, Pfizer, Westfield Insurance, CD&R, General Atlantic Partners, EQT, Nielsen, HCA, Duke University and more.

His ability to express the complex in clear, simple terms has made him a popular speaker in the industry and is frequently published in prominent trade journals.

Previously worldwide President of Enterprise IG, part of WPP Group plc, Ron has a BA in Economics from the University of Colorado.

Lizzie is a graduate of Georgetown University, with a double major in Psychology and Art History.

Her clients include, HCA, Duke University, CD&R, CheckPoint Therapeutics and Rutgers Health, among others.

Lizzie has previously worked in several client-facing roles, as a Gallery Associate in NYC, as well as on the Media Relations team at a PR and Communications firm.

Through her work she gained a deep understanding of how to creatively position clients and refine their purpose and goals. In her free time, Lizzie loves to visit art museums, cook and take yoga classes.
MIKE LOEHR
Solve Digital Partners

Mike is CEO and co-founder of Solve Digital Partners, with backgrounds in technology and broadcast journalism. In 25 years of DAM and marketing technology experience, he’s designed and built award-winning solutions for some of the most recognized brands, including GE, Deloitte, American Express and Century21.

He has an unmatched depth of knowledge and understanding of how technology can help educate, inspire, and reward employees around a brand. Outside of brand work, Mike spends time with his family, playing tennis and traveling as much as possible.

MATT FILBY
Solve Digital Partners

Matt is a founding partner of Solve Digital Partners, where he continues his dedication to helping organizations find better ways to communicate and work in the digital world.

A designer for nearly 25 years, he’s focused on Web application design and development since 2000. His dedication to creating intuitive user experiences and working with clients to create vision and conceive solutions has delighted a range of Fortune 500 companies. He has earned a few awards over the years but finds satisfied clients to be a greater reward.
CRISTIANE BORGES
Chief Creative Officer

Cristiane has been working in the New York City’s advertising industry for more than seven years. She created work for agencies such as Ogilvy (for the offices in New York, Brussels, and Toronto), Sapient Razorfish, McCann, Weber Shandwick, DKNY, Time Inc., Havas Media, Wolff Olins, and Barrow’s Global, among several others.

Her work as an Information Designer includes screen presentations, RFI and RFP decks, and infographics and animation design for clients in the industries of entertainment, fashion, technology, automotive, finance, chemical, pharmaceutical, transportation, retail, food, and cosmetics.

In the pharmaceutical and healthcare industries, she has worked for brands such as Bayer, Novartis, Bristol-Myers Squibb, Mylan, Pfizer, Sunovion, Sage Therapeutics, Stryker, iBio, and Johnson & Johnson, among others.

NANCY SENKEN
Chief Administrative Officer

Nancy is CAO at Infinia Group. She is responsible for the creation and implementation of company systems and procedures, human resources, A/P and A/R, public relations, and office management.

Before joining Infinia, she was Vice President, Business Development and Administration, at Enterprise IG, owned by WPP Group, where she was responsible for public relations, business development, human resources, and office management. Nancy was also a Senior Associate at brand and identity consulting firm Lippincott Mercer, responsible for the development of the firm’s marketing materials. Nancy attended John Abbott College in Montreal, Canada, and New York University where she studied marketing and organizational behavior.
SELECTED CLIENTS

Founded in 2003 Infinia creates strategic communications and designs that move organizations forward. We do this by making the complex simple and the simple memorable.

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Founded in 2012 Solve helps managers of high-value brands improve control, maintain consistency, and build employee engagement, with technology and service offerings to increase marketing efficiency and reduce costs.

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