



Marketing automation using CRM Integration

Orthodontics Healthcare Provider

Integrated patient data from multiple Practice Management Systems with the CRM tool (ActiveCampaign) to support marketing initiatives and improve lead conversion ratio

Healthcare services provider needs HEDIS immunization measures compliance & gaps reporting

Picture this...

You're looking to integrate patient data of all practices with the CRM tool (ActiveCampaign) for providing visibility into lead status and supporting marketing initiatives. Currently lacking the capability to share curated marketing communication with the leads (patients) based on their treatment status.

You turn to Accordion.

We partner with your team to Integrated patient data from multiple Practice Management Systems with the CRM tool (ActiveCampaign) to support marketing initiatives and improve lead conversion ratio, including:

- 1) Harmonizing patient data for more than 40 practices from 8 different PMS systems, in the Azure-based data warehouse; and developing an automated process to integrate the data with ActiveCampaign
- 2) Setting up data warehouse connection with the SharePoint file to incorporate updates in the lead status mapping. It allowed the client to incorporate the updates in their marketing strategy dynamically
- 3) Developing an Exception report at a practice level to identify data issues (such as duplicate entry, invalid Email address, manual data entry error, etc.) within PMS system and ActiveCampaign; and suggest potential next steps to rectify them

Your value is enhanced.

- CRM automation for customized marketing communications enhanced the 'Case Acceptance rate' by around 3%, resulting in an annual revenue gain of almost \$4.5M
- The CRM automation helped update ~600 prospects daily automatically in the CRM platform, based on their state and appointment schedule and saved about ~1,050 person-hours per month across all practices

KEY RESULT

- Enhanced the 'Case Acceptance rate' by around 3%
- Annual revenue gain of almost \$4.5M
- The CRM automation helped update ~600 prospects
- Saved about ~1,050 person-hours per month

VALUE LEVERS PULLED

- Data integration between data warehouse (Azure-based) and ActiveCampaign
- Data Exception report

Marketing automation using CRM integration for healthcare provider company

Situation

- Client lacked the capability to share curated marketing communication with the leads (patients) based on their treatment status
- Partnered with the client to integrate patient data of all practices with the CRM tool (ActiveCampaign) for providing visibility into lead status and supporting marketing initiatives

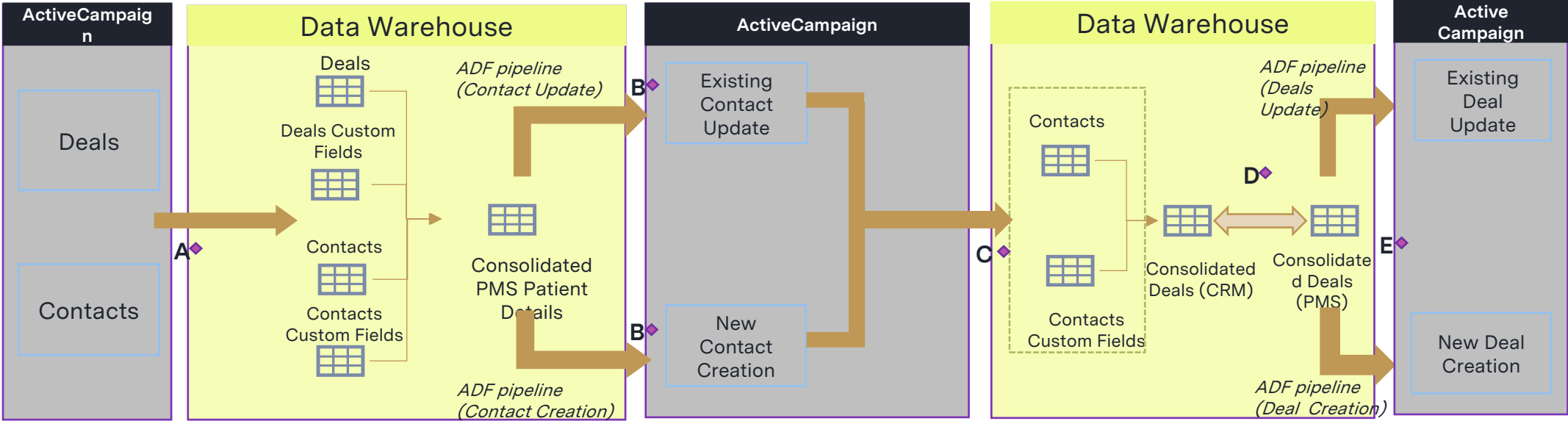
Accordion Value Add

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Impact

- CRM automation for customized marketing communications enhanced the 'Case Acceptance rate' by around 3%, resulting in an annual revenue gain of almost \$4.5M
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Methodology/ approach



- A ----- Deals (Patient) and contacts (Responsible Party) data in CRM were copied to data warehouse
- B ----- Consolidated contacts data (new contacts & existing contact updates) were copied to CRM through API connection
- C ----- Additional contacts (with ActiveCampaign identifier) were copied to data warehouse
- D ----- Deals data from CRM is compared with the data warehouse and Exception Handling report was generated
- E ----- Consolidated deals data (new deals and updates in the existing deals) was copied to CRM through API connections

Data exception report

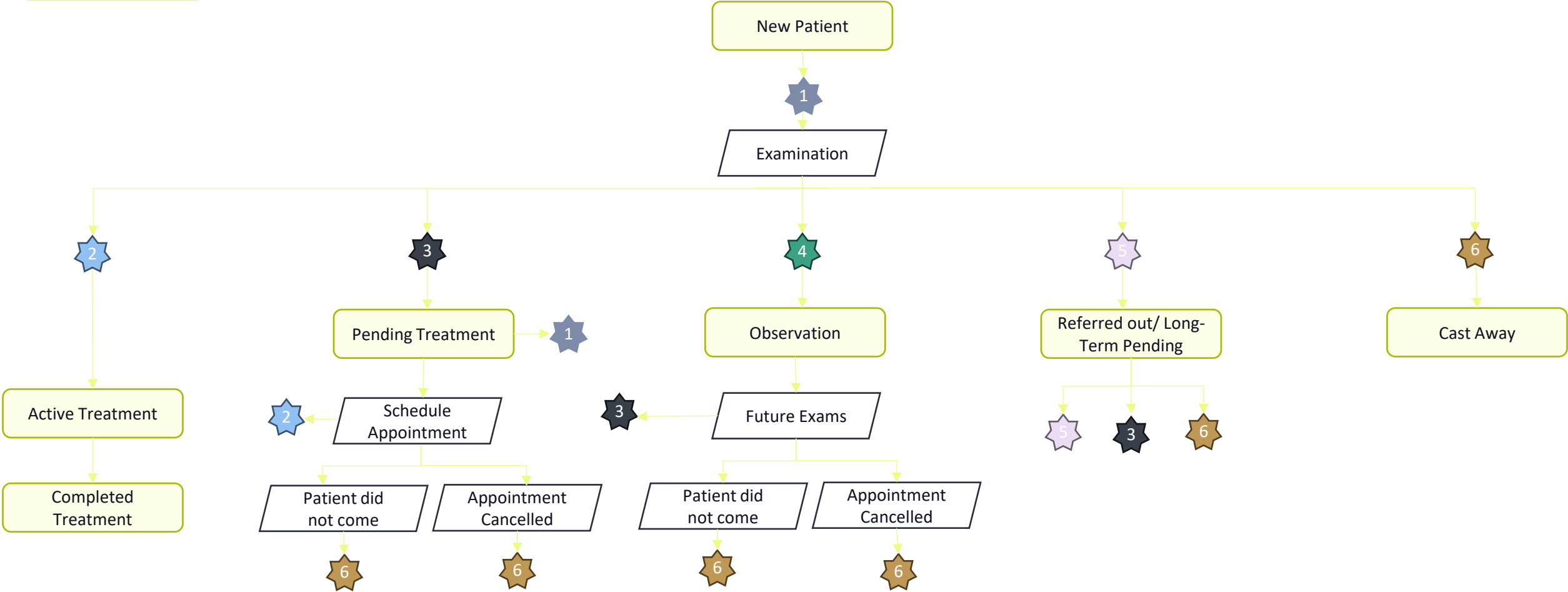
Practice ID	Practice Name	Deal ID	Deal Title	Deal DOB	Deal Created Date	Deal Status	Deal Appointment Status	Responsible Party Email	Deal Exam Date	Contact	Responsible Party Name	Potential Data Issue
1001	ABC	66	Patient Name 1	Date 1	11/4/20XX 0:00	Open	No Appointment	abc@gmail.com		858	Name 3	Deal duplicate
1001	ABC	4224	Patient Name 1	Date 1	7/13/20XX 0:00	Open	No Appointment	abc@gmail.com		858	Name 3	Deal duplicate
1001	ABC	1971	Patient Name 2	Date 2	11/28/20XX 0:00	Open	No Appointment	123		4460	Name 4	Invalid Email ID
1001	ABC	4625	Patient Name 3	Date 3	8/24/20XX 0:00	Open	No Appointment	ab@		4460	Name 5	Invalid Email ID
1001	ABC	1591	Patient Name 4	Date 4	11/4/20XX 0:00	Open	Appointment Scheduled	def@gmail.com	Date 5	591	Name 6	-
1001	ABC	4135	Patient Name 5	Date 5	7/13/20XX 0:00	Open	Appointment Scheduled	def@gmail.com	Date 6	591	Name 6	-

Potential Duplicate

Invalid Email ID

The report highlight issues such as duplicate data, incorrect email ID, etc., at a practice level, for data cleaning

EXHIBIT #2 – PATIENT STATUS FLOW CHART



Notes:

- **New Patient:** Patient visited the practice
- **Active Treatment:** Patients undergoing the treatment
- **Completed Treatment:** Patient's treatment is completed
- **Pending Treatment:** Patient recommended with treatment, but it is yet to start
- **Observation:** Patient recommended treatment after some period
- **Referred out:** Patient referred to a different doctor/ procedure
- **Long-Term Pending:** Patient recommended treatment after some period, but the patient is not responding
- **Cast Away:** Patient not responding from long time. Hence, the deal is closed lost.

Learnings

- 1) End to end process of managing leads (orthodontic patients) – with targeted marketing
- 2) ActiveCampaign capabilities and limitations