

EXECUTIVE DASHBOARD FOR MARKETING

ABOUT THE CLIENT

Client is a rapidly expanding **network of dental clinics in Canada** managing around 400 practices

SITUATION



- The client **did not have visibility into the performance of the practices or impact of marketing efforts** as the data was sourced from multiple systems and the process of creating the reports/dashboards was manual
- Merilytics partnered with the client to **setup a robust reporting environment and build advanced analytical models** so that the client can make strategic data driven decisions.

VALUE ADDITION



- Designed and setup a **robust data warehouse** consolidating the data from various sources such as Pronto, Sikka, UltiPro etc. and that would serve as the single source of truth
- Defined **key performance indicators** to define patient behavior to support Marketing analytics to understand and track the performance of the practices
- Built robust **Tableau and Excel based Business Intelligence interface** to provide real-time visibility into performance and so that the team can track and take decisions immediately
- Built **analytical models** to understand the leads, patient's behavior and procurement requirements of the practices so that the client's Marketing team is equipped to make strategic data backed decisions faster

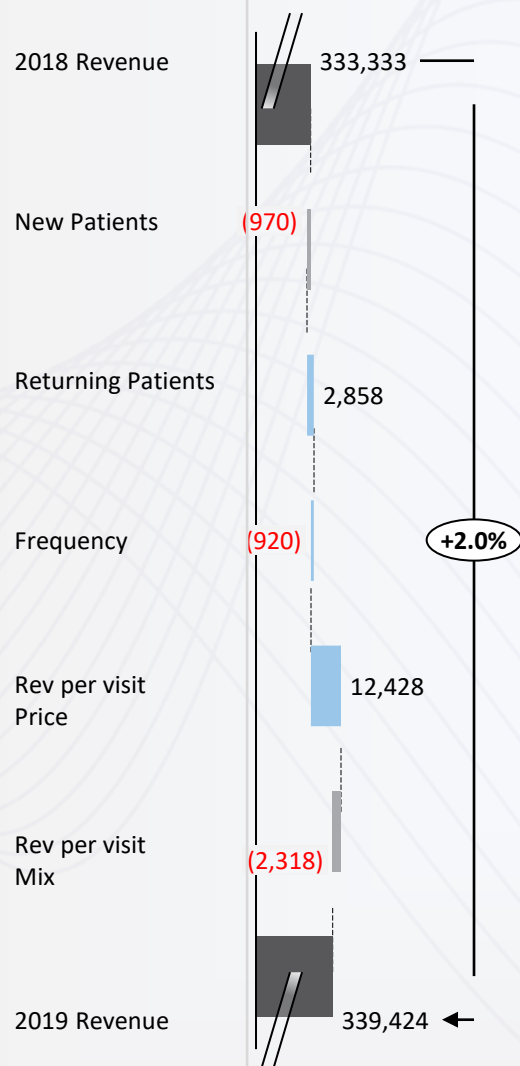
IMPACT



- Provided **real-time visibility** into the business and equipped the Marketing team with access to critical data helping them make decisions faster. **Reduced the team's effort** in preparing for the monthly review board meetings from around 2 weeks to 2 days
- Provided **insights into the patient behavior** to the Marketing team to help them make decisions on marketing budgets and support them during the monthly executive meetings

EXECUTIVE DASHBOARD – REVENUE MIX ANALYSIS

Revenue bridge
YTD \$000s impact vs. prior year

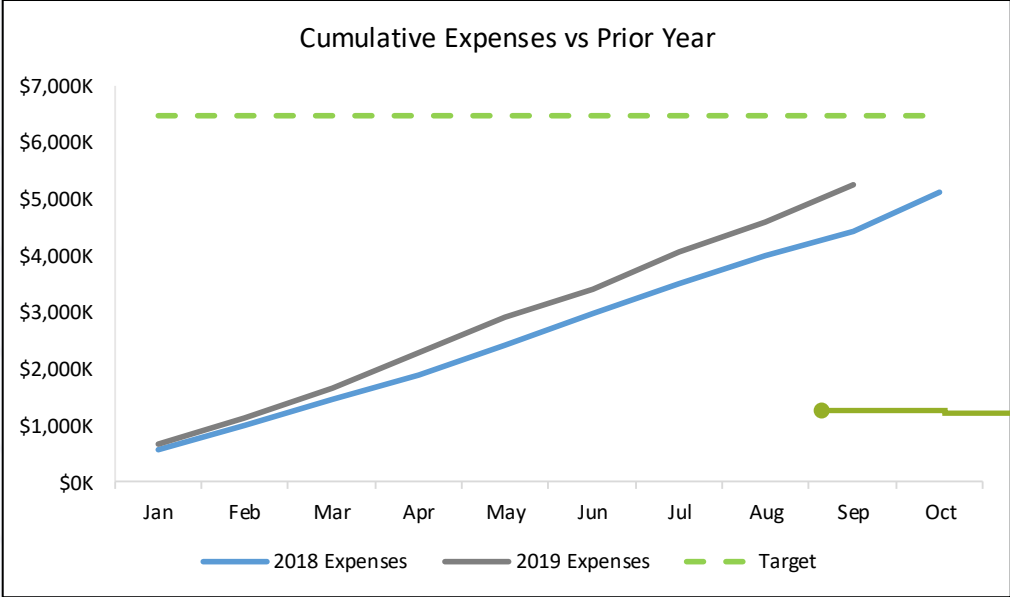
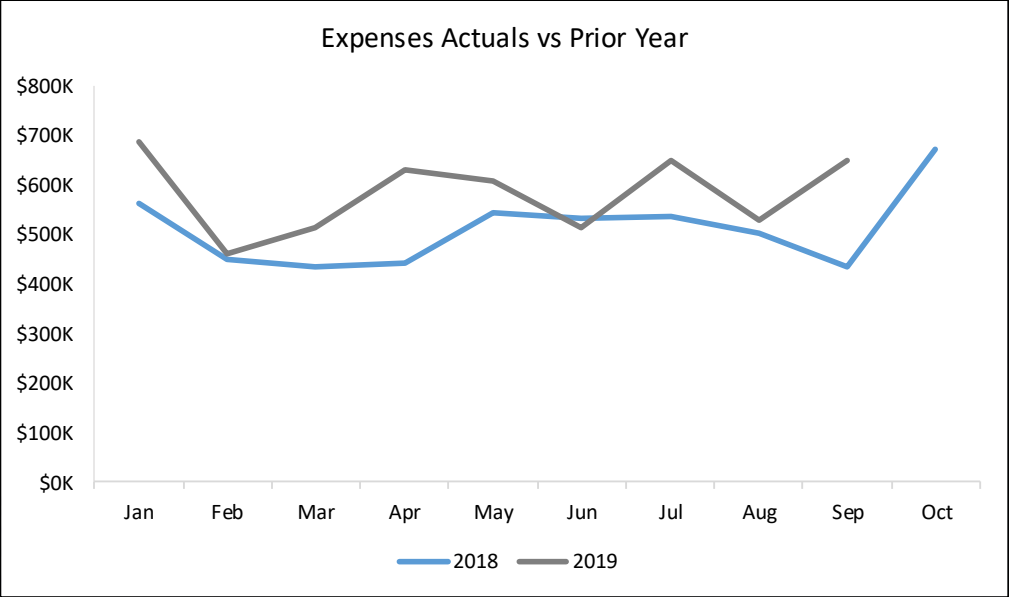


Revenue bridge and key metrics
\$000s and % impact vs. prior year

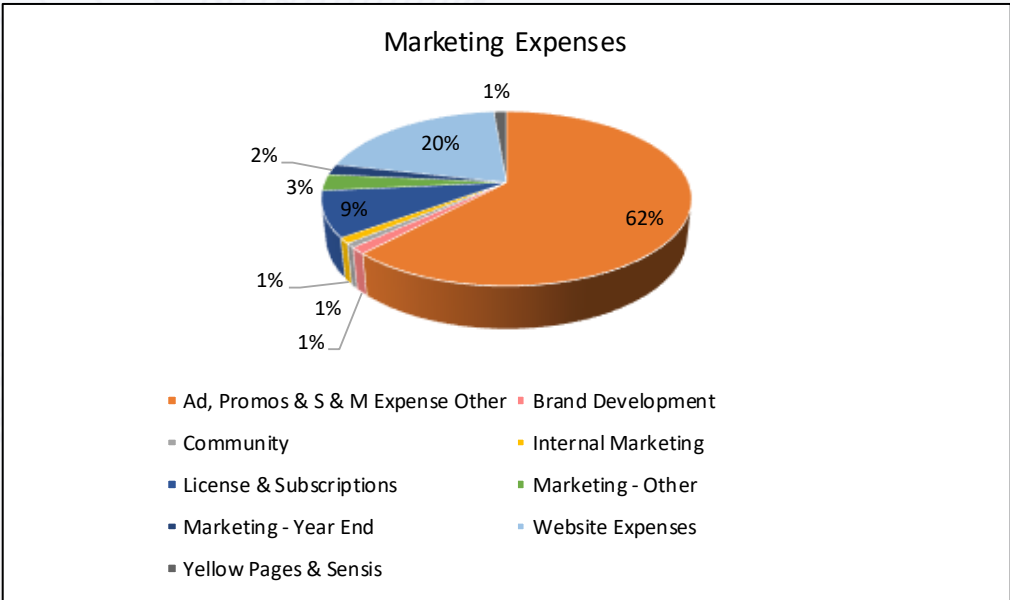
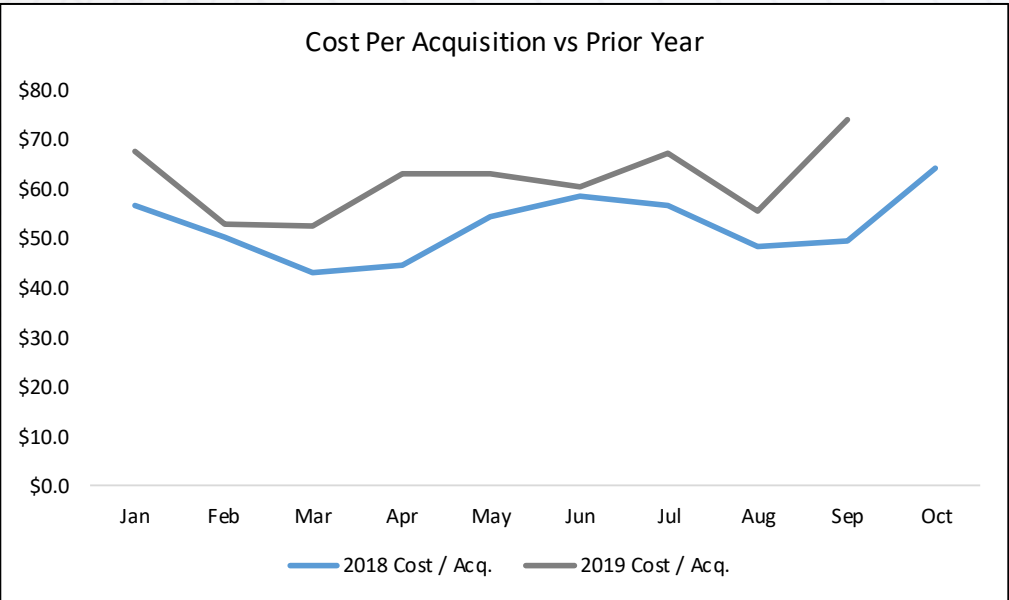
	November		YTD	
	%	\$	%	\$
Total Revenue				
Revenue	1.9%	\$587	2.0%	\$6,091
Visits	(0.0%)	(\$5)	0.0%	\$124
Rev per visit	1.9%	\$591	1.9%	\$5,967
ABC Revenue				
Revenue	2.2%	\$480	2.0%	\$4,151
Visits	(0.3%)	(\$67)	(0.5%)	(\$978)
Rev per visit	2.5%	\$547	2.4%	\$5,130
XYZ Revenue				
Revenue	1.1%	\$107	2.1%	\$1,940
Visits	0.4%	\$38	0.8%	\$723
Rev per visit	0.7%	\$68	1.3%	\$1,217
Base				
Unique Patients	0.9%	\$294	0.3%	\$1,044
New Patients	(0.1%)	(\$5)	(1.8%)	(\$970)
Returning Patients	0.9%	\$299	0.7%	\$2,014
Patients type A	1.1%	\$321	1.0%	\$2,146
Patients type B	(3.5%)	(\$44)	(3.0%)	(\$687)
Patients type C	2.3%	\$22	1.8%	\$555
Frequency				
Patient Frequency	N/A		(0.3%)	(\$920)
Rev / visit bridge				
Price - % change	2.6%	\$823	2.7%	\$8,285
Mix - % change	(0.7%)	(\$232)	(0.9%)	(\$2,318)
Other key metrics				
PQR gap %	(42.7%)	(\$177)	(10.5%)	(\$2)
Due late %	(6.9%)		(7.7%)	

EXECUTIVE DASHBOARD – MARKETING REVIEW

ILLUSTRATIVE



Provided the flexibility to view the charts at an overall, province, marketing manager and practice level



ADDITIONAL ANALYSES LEADING TO ACTIONABLE INSIGHTS (1/2)

ILLUSTRATIVE

ANALYZED AND PROVIDED INSIGHTS INTO THE PATIENT BEHAVIOR TO HELP THE MARKETING TEAM PLAN MARKETING ACTIVITIES

Problem Statement	Merilytics value-add	Key findings/Potential use-case
Patient re-attachment analysis: What are they key drivers for patients to switch practices? What is true network level New Patients?	<ul style="list-style-type: none"> Performed a de-duplication exercise and uniquely identified patients across client practices Identified behavior patterns for patients who visited 2 or more client practices in their lifetime based on their transactions, dental procedures, same practice group referrals, etc. 	<ul style="list-style-type: none"> Supported the Marketing team to compare the insights and validate the same from a market survey conducted through a vendor Marketing team leveraged this analysis in their discussions with the Leadership team
Patient LTV analysis: What is the average lifetime value of a patient? What drives high revenue/frequency?	<ul style="list-style-type: none"> Analyzed patient behavior to compare patient LTV across segments and understand key drivers for high revenue/visit frequency 	<ul style="list-style-type: none"> Enhanced visibility into the estimated revenue from a patient based on the historical behaviour to drive the marketing team's discussions with the practices
Patient cohort analysis: To provide a quick overview on the patient traffic over past couple of years	<ul style="list-style-type: none"> Analyzed patient traffic to identify the unique number of patients that are visiting the practices on a monthly basis Provided a breakdown for Active Patient Base based on the last visit date 	<ul style="list-style-type: none"> Marketing team leveraged this analysis during their discussions with Senior Leadership Visibility into the unique patients that are visiting client practices in a year
Revenue attrition analysis: What share of revenue is retained through existing patient base? What is the gap in revenue that could be filled by acquiring new patients?	<ul style="list-style-type: none"> Created practice cohorts based on their association with client's practice and analyzed revenue retained over subsequent years Analyzed the revenue attrition from patients that visited a practice for the first time for an emergency treatment 	<ul style="list-style-type: none"> Marketing team leveraged the results to revise the New Patients targets for 2019

ADDITIONAL ANALYSES LEADING TO ACTIONABLE INSIGHTS (2/2)

ILLUSTRATIVE

ANALYZED THE CONVERSION OF LEADS AND THE PERFORMANCE OF VARIOUS REFERRAL SOURCES TO ATTRACT NEW PATIENTS

Problem Statement	Merilytics value-add	Key findings/Potential use-case
Leads & Conversions analysis: What is the conversion rate for calls and form submissions on the website?	<ul style="list-style-type: none"> Estimated conversions from calls (leads) to new patients based on call tracking data 	<ul style="list-style-type: none"> Understanding of the average call durations, patient source and trend over time, and the impact on lead conversion
New patient referral source analysis: Identify prominent sources of new patients (referral, online etc.)	<ul style="list-style-type: none"> Extracted and cleaned up referral sources entered into the PMS system Provided a breakdown of new patients acquired since 2018 by referral source 	<ul style="list-style-type: none"> Helped the Marketing team to identify the impact of each referral source in converting a lead into New Patients

OTHER ANALYSIS PERFORMED TO SUPPORT THE PROCUREMENT AND MARKETING TEAMS

Problem Statement	Merilytics value-add	Key findings/Potential use-case
Spend optimization model: Suggest best supplier/alternates for a product to reduce overall spend	<ul style="list-style-type: none"> Identified the best supplier for a given product based on manufacturer part identifier and product mapping between suppliers Estimated savings that can be realized when switched to best supplier for both branded or private label products Provided supplier level savings that can realized when a practice re-routes their spend through only one supplier Incorporated the model into Procurement Dashboard 	<ul style="list-style-type: none"> Recommended best supplier to go with based on any procurement requirements to the client practices Also, provided recommendations for any suitable alternate product
Hygiene pricing analysis: What is the mix of hygiene procedure prices?	<ul style="list-style-type: none"> Analyzed procedure amounts from patient transactions and compared with Fee Guide pricing 	<ul style="list-style-type: none"> Identified price variance for procedures by each practice and estimated opportunity from unbilled procedures