

MARKETING AND PATIENT BEHAVIOR ANALYTICS

ABOUT THE CLIENT

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

SITUATION



- The client **did not have real-time 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 set up a **robust reporting environment** and build advanced analytical models to track customer acquisition metrics to determine **impact of marketing efforts**

VALUE ADDITION



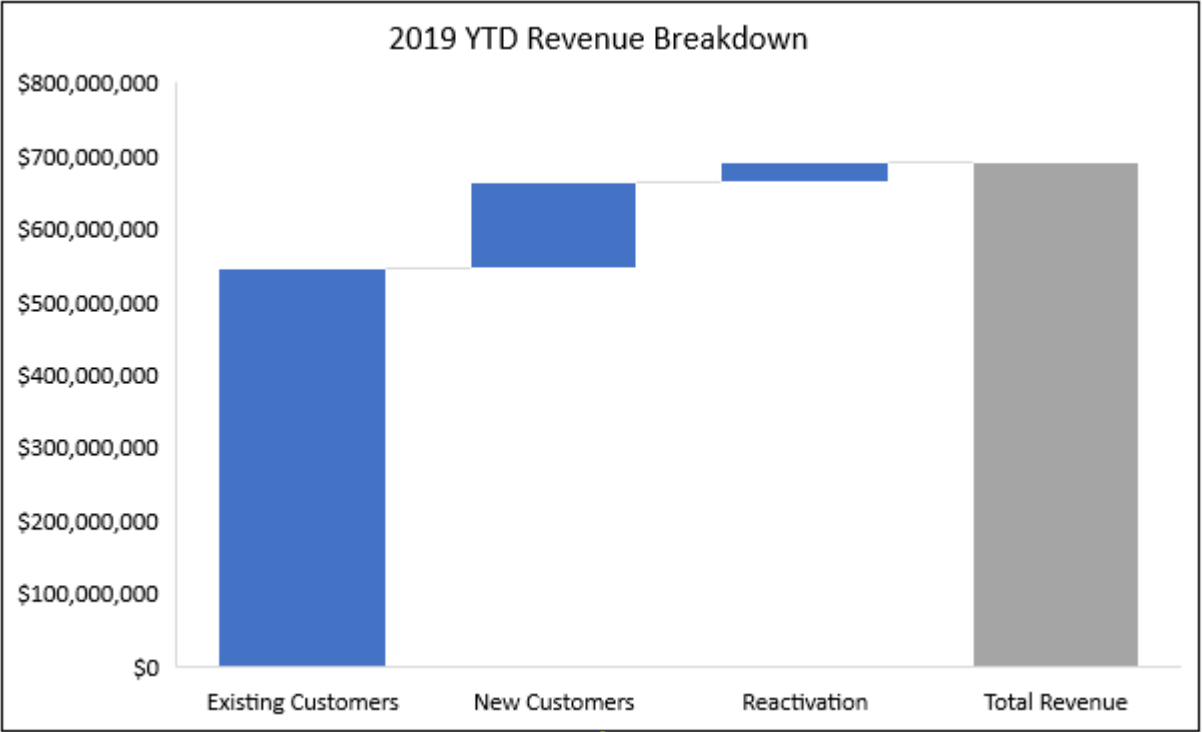
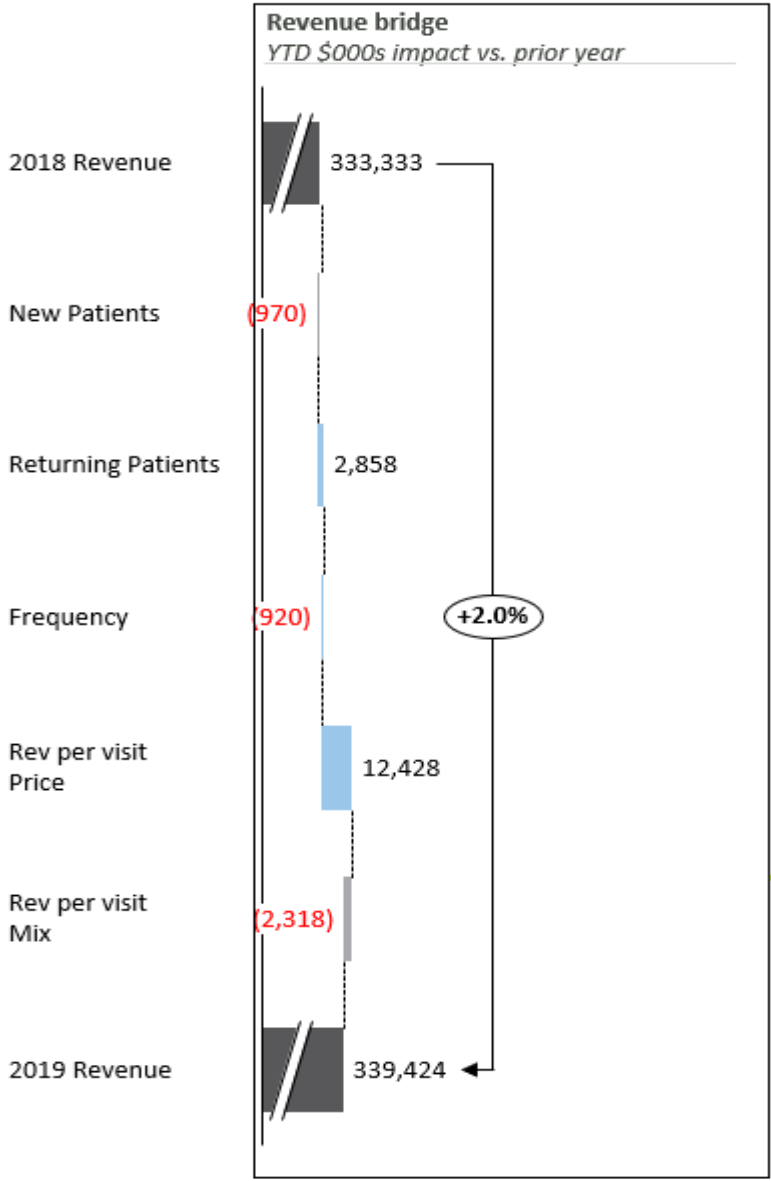
- Designed and set up a **robust data warehouse** consolidating the data from various sources such as Pronto, Sikka, UltiPro etc. and that would serve as the single source of truth
- Defined KPIs on patient behavior to support Marketing analytics, and understand/track the performance of the practices
- Built **analytical models** to understand the leads and patient behavior so that the client's Marketing team is equipped to make data driven decisions quicker
- 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

IMPACT



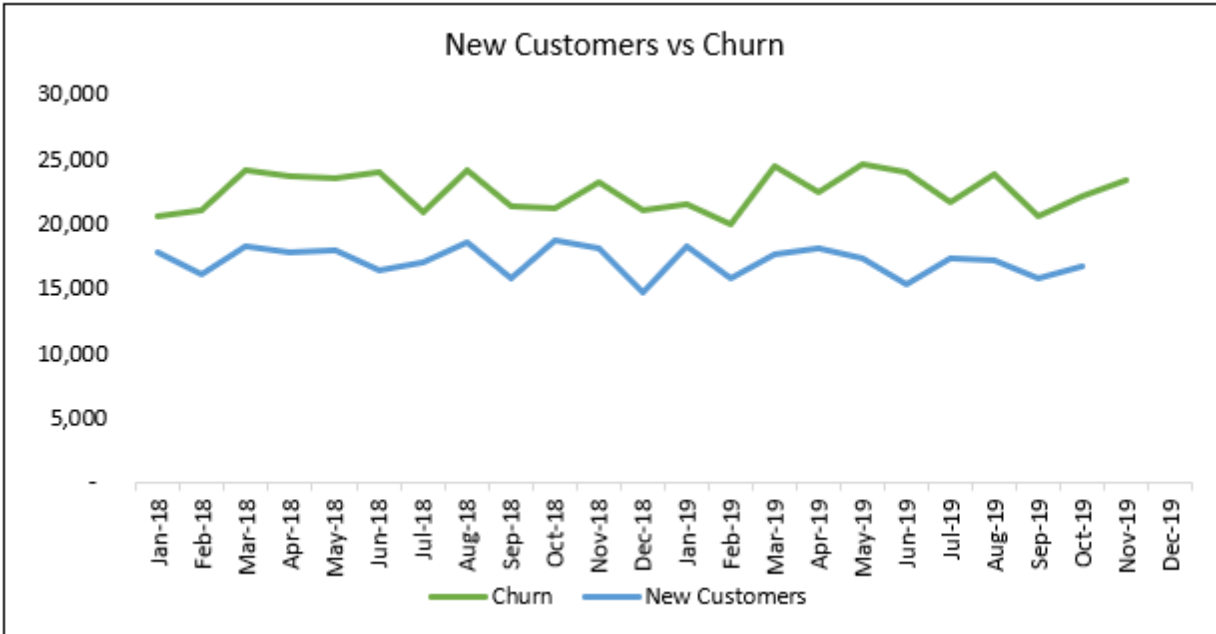
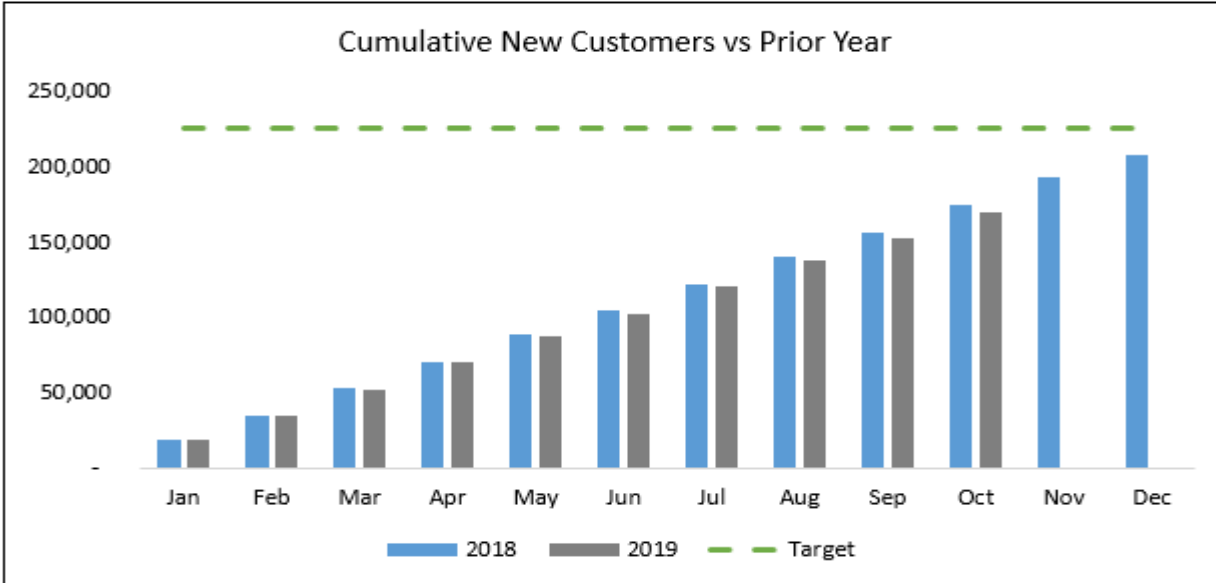
- Provided **real-time visibility** into customer acquisition metrics and patient behavior, and equipped the Marketing team with access to critical data helping them make decisions faster.
- **Reduced Marketing team's effort** in preparing for the monthly review board meetings from 2 weeks to 2 days

REVENUE BREAKDOWN TO ESTIMATE MARKETING TARGETS FOR NEW CUSTOMER ACQUISITION



Displayed the impact of various factors on the YoY revenue change, and split revenue impact by existing, new and reactivated customers, helping the Marketing team produce targets for new customer acquisition

GROSS NEW PATIENTS SUMMARY



| Marketing Manager Performance by YoY GNP Variance (Jan-Oct) | | | | | |
|---|-------------------|--------------|--------------|--------|--------|
| Rank | Marketing Manager | 2019 Actuals | 2018 Actuals | Var, # | Var, % |
| 1 | AB | 17,705 | 17,192 | 513 | 3.0% |
| 2 | CD | 15,187 | 15,196 | -9 | -0.1% |
| 3 | EF | 38,722 | 39,134 | -412 | -1.1% |
| 4 | GH | 21,602 | 22,361 | -760 | -3.4% |
| 5 | IJ | 44,543 | 46,197 | -1,654 | -3.6% |
| 6 | KL | 32,038 | 34,636 | -2,597 | -7.5% |

Provided visibility into the new patients acquired and churned patients. Also, compared the cumulative journey with the annual targets.

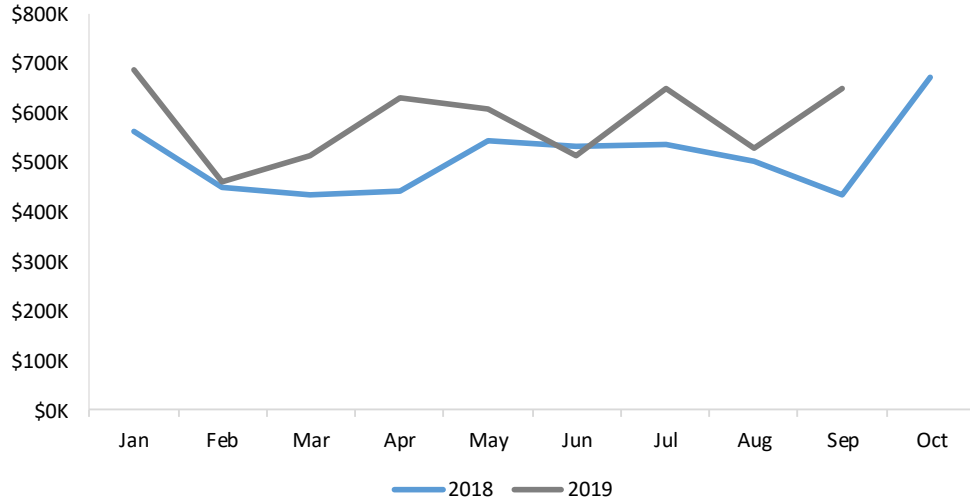
Provided visibility into the performance of Marketing Managers based on the YoY Gross New Patients acquired in the period.

MARKETING EXPENSES REVIEW

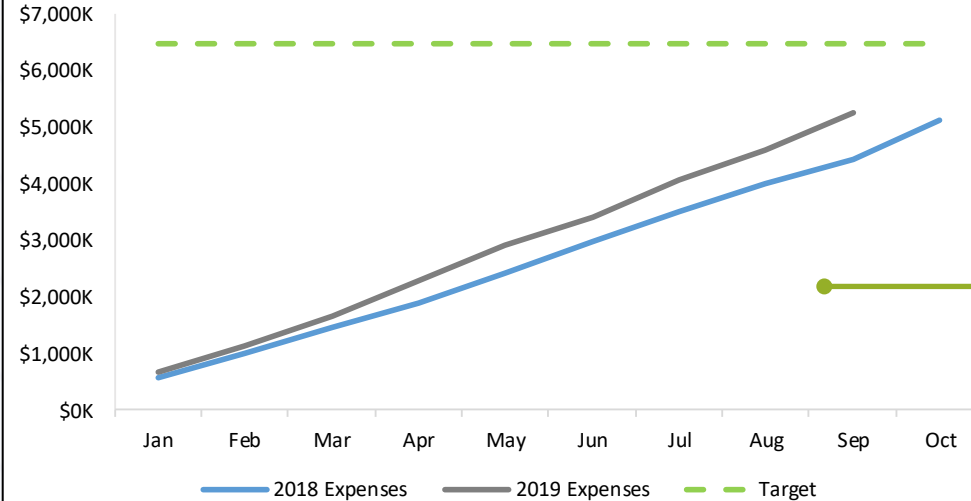
ILLUSTRATIVE

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

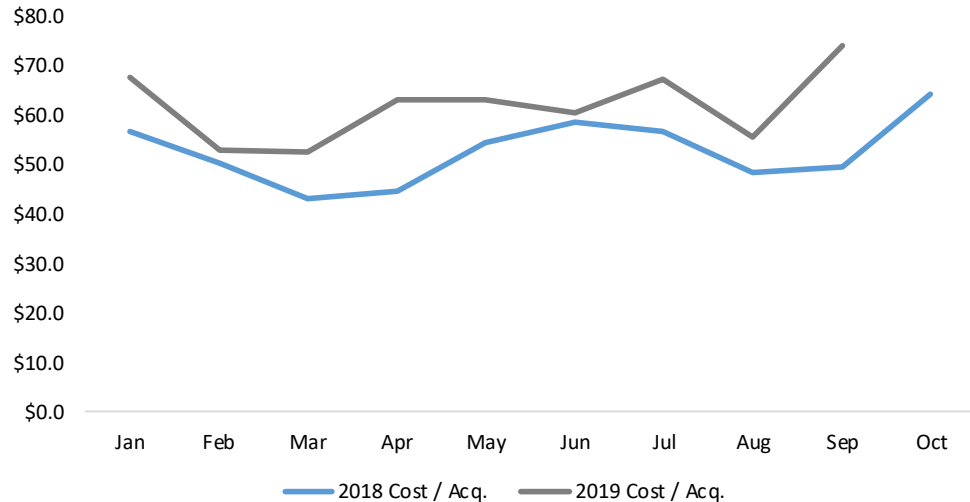
Expenses Actuals vs Prior Year



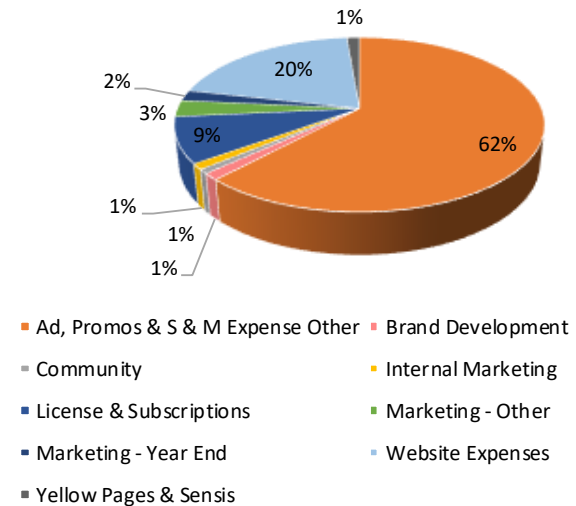
Cumulative Expenses vs Prior Year



Cost Per Acquisition vs Prior Year



Marketing Expenses



ADDITIONAL ANALYSES LEADING TO ACTIONABLE INSIGHTS

ILLUSTRATIVE

| ANALYZED AND PROVIDED INSIGHTS INTO THE PATIENT BEHAVIOR TO HELP THE MARKETING TEAM PLAN VARIOUS 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 through a market survey conducted by a vendor |
| 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 budgeting decisions |
| 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 Identified Active Patient Base based on the last visit date | <ul style="list-style-type: none"> Ability to track gross new patient flow, to determine benefits of marketing efforts |
| 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 annual New Patients targets |