ENNU HubSpot Data Architecture Specification

Prepared for: ENNU Leadership Team
Document Version: 2.0
Date: June 19, 2025
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Executive Summary

This document outlines the comprehensive HubSpot data architecture required to synchronize ENNU's existing systems (Open Medical, Open Dental, and OM Aggregation) with HubSpot CRM. The recommended approach leverages HubSpot's standard objects with custom fields, requiring only minimal custom objects for specialized medical data.

Key Benefits of This Architecture

- **Cost Efficiency**: Reduces custom objects from 12 to 3, enabling use of HubSpot Professional tier
- **Faster Implementation**: 5-week deployment timeline using proven standard objects
- **Enhanced Functionality**: Leverages HubSpot's native workflows, reporting, and automation
- **Future-Proof**: Minimizes risk from platform updates and changes
- **Team Adoption**: Uses familiar HubSpot interfaces for easier staff training

Investment Summary

- **Implementation Timeline**: 5 weeks
- **Custom Objects Required**: 3 (vs 12 in alternative approach)
- **Custom Fields Total**: 108 across standard objects + 42 in custom objects
- **HubSpot Tier Requirement**: Professional (vs Enterprise in alternative)
- **Estimated Cost Savings**: 40-60% reduction in ongoing HubSpot costs

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Data Architecture Overview

Source Systems Integration

- **Open Medical (OM)**: Primary patient management and medical records
- **Open Dental (OD)**: Appointment scheduling and aesthetic services
- **OM Aggregation**: Historical data consolidation and calculated fields
- **Legacy CRM**: Marketing attribution and lead source data

Target HubSpot Architecture

- **Standard Objects**: Contacts, Companies, Deals, Meetings, Products, Tickets
- **Custom Objects**: Lab Results, Measurement History, Prescriptions
- **Data Flow**: Real-time and batch synchronization based on data criticality
- **Relationships**: Comprehensive object associations for complete patient journey tracking

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Standard Objects Implementation

1. Contacts Object - Patient/Member Records

Purpose: Central repository for all patient demographic, medical, and contact information

Standard Fields Utilized: - Contact Information: First Name, Last Name, Email, Phone, Mobile Phone - Address: Address, City, State, Postal Code - Demographics: Date of Birth, Gender - Relationships: Company (Clinic), Owner (MCA/Provider) - Lifecycle: Lifecycle Stage, Lead Status, Lead Source

Custom Fields Required: 65 fields

Critical Medical Information Fields

Field Name	Property	Type	Source	Priority
Open Medical Patient ID	`open_medical_patient_id`	Number	OM	Critical
Open Dental Patient ID	`open_dental_patient_id`	Number	OD	Critical
Chart Number	`chart_number`	Text	OM/OD	Medium

Field Name	Property	Type	Source	Priority
Primary Provider ID	`primary_provider_id`	Number	OM/OD	High
Has Active Medications	`has_active_medications`	Checkbox	OM/OD	Medium
Has Known Allergies	`has_known_allergies`	Checkbox	OM/OD	Medium

Patient Status and Lifecycle Fields

Field Name	Property	Type	Source	Priority
Patient Status OM	`patient_status_om`	Dropdown	OM	Critical
Status OM	`status_om`	Dropdown	OM Agg	Critical
Sub Status OM	`sub_status_om`	Dropdown	OM Agg	High
Last Appointment Date	`last_appointment_date`	DateTime	OM/OD	Critical
Next Appointment Date	`next_appointment_date`	DateTime	OM/OD	Critical

Financial Information Fields

Field Name	Property	Type	Source	Priority
Account Balance	`account_balance`	Number	OM/OD	High
Estimated Balance	`estimated_balance`	Number	OM/OD	High
Insurance Carrier	`insurance_carrier`	Text	OM/OD	Medium
Fee Schedule	`fee_schedule`	Dropdown	OM	Medium

Communication Preferences Fields

Field Name	Property	Type	Source	Priority
	`marketing_email_permission`	Checkbox		Critical

Field Name	Property	Type	Source	Priority
Marketing Email Permission			OM Agg	
Marketing Text Permission	`marketing_text_permission`	Checkbox	OM Agg	Critical
Preferred Contact Method	`preferred_contact_method`	Dropdown	OM	Medium
Text Message OK	`text_message_ok`	Dropdown	OM	Medium

Current Health Metrics Fields

Field Name	Property	Type	Source	Priority
Current Weight	`current_weight`	Number	OM Agg	High
Current BMI	`current_bmi`	Number	OM Agg	High
Current Waist	`current_waist`	Number	OM Agg	High
Last Measurement Date	`last_measurement_date`	Date	OM Agg	High

Goals and Outcomes Fields

Field Name	Property	Type	Source	Priority
Primary Goal	`primary_goal`	Text	OM Agg	High
Goal Energy Metabolism	`goal_energy_metabolism`	Checkbox	OM Agg	High
Goal Weight Loss	`goal_weight_loss`	Checkbox	OM Agg	High
Goal Hormone Balance	`goal_hormone_balance`	Checkbox	OM Agg	High

2. Companies Object - Clinic Locations

Purpose: Track ENNU clinic locations and facility information

Standard Fields Utilized: - Company Name, Phone Number, Address, City, State, Postal Code - Industry (Healthcare), Type (Clinic)

Custom Fields Required: 7 fields

Field Name	Property	Type	Source	Priority
Clinic Number	`clinic_number`	Number	OM	Critical
Clinic Abbreviation	`clinic_abbreviation`	Text	OM	High
Clinic Region	`clinic_region`	Text	OM	Medium
Clinic Support Phone	`clinic_support_phone`	Phone	OM	Medium

3. Deals Object - Program Enrollments

Purpose: Track patient program enrollments, memberships, and treatment packages

Standard Fields Utilized: - Deal Name, Deal Stage, Amount, Close Date, Create Date - Associated Contact, Associated Company, Deal Source

Custom Fields Required: 14 fields

Field Name	Property	Type	Source	Priority
Program Type	`program_type`	Dropdown	OM Agg	Critical
Program Length	`program_length`	Dropdown	OM Agg	High
Program Start Date	`program_start_date`	Date	OM Agg	Critical
HRT Consult Completed	`hrt_consult_completed`	Checkbox	OM Agg	Critical
Baseline Review Completed	`baseline_review_completed`	Checkbox	OM Agg	Critical

Field Name	Property	Type	Source	Priority
Baseline Lab Completed	`baseline_lab_completed`	Checkbox	OM Agg	Critical

4. Meetings Object - Appointments

Purpose: Track all patient appointments across medical and aesthetic services

Standard Fields Utilized: - Meeting Name, Start Time, End Time, Meeting Type - Associated Contact, Associated Deal, Owner

Custom Fields Required: 10 fields

Field Name	Property	Type	Source	Priority
Appointment Number	`appointment_number`	Number	OM/OD	Critical
Appointment Type	`appointment_type`	Dropdown	OM/OD	High
Appointment Status	`appointment_status`	Dropdown	OM/OD	High
Treatment Code	`treatment_code`	Text	OM/OD	High
Clinic Location	`clinic_location`	Dropdown	OM/OD	High
Provider ID	`provider_id`	Number	OM/OD	High

5. Products Object - Services and Programs

Purpose: Catalog of ENNU's medical programs, aesthetic services, and lab tests

Standard Fields Utilized: - Product Name, Description, Price, SKU, Product Type

Custom Fields Required: 7 fields

Field Name	Property	Type	Source	Priority
Procedure Code	`procedure_code`	Text	OM	Critical
Service Category	`service_category`	Dropdown	OM	High
Program Length Days	`program_length_days`	Number	OM	High

Field Name	Property	Type	Source	Priority
Requires Lab Work	`requires_lab_work`	Checkbox	OM	Medium

6. Tickets Object - Patient Support

Purpose: Track patient support requests, billing issues, and service problems

Standard Fields Utilized: - Ticket Name, Ticket Status, Priority, Category - Associated Contact, Create Date, Close Date

Custom Fields Required: 5 fields

Field Name	Property	Type	Source	Priority
Issue Type	`issue_type`	Dropdown	Manual	High
Clinic Location	`clinic_location`	Dropdown	Manual	Medium
Resolution Notes	`resolution_notes`	Multi-line	Manual	Medium

Custom Objects (Specialized Medical Data)

1. Lab Results Object

Purpose: Track detailed laboratory test results with historical values and reference ranges

Why Custom: Complex lab data structure with multiple related values doesn't fit standard objects

Fields: 14 total

Field Name	Property	Type	Source	Priority
Lab Result ID	`lab_result_id`	Number	OM/OD	Critical
Patient ID	`patient_id`	Number	OM/OD	Critical
Lab Test Type	`lab_test_type`	Dropdown	OM/OD	High
Lab Date	`lab_date`	Date	OM/OD	High

Field Name	Property	Type	Source	Priority
Lab Value	`lab_value`	Text	OM/OD	High
Reference Range Low	`reference_range_low`	Number	OM	Medium
Reference Range High	`reference_range_high`	Number	OM	Medium
Lab Status	`lab_status`	Dropdown	OM	High
Is Abnormal	`is_abnormal`	Checkbox	OM	Medium
Critical Flag	`critical_flag`	Checkbox	OM	High

2. Measurement History Object

Purpose: Track detailed physical measurements over time with multiple data points

Why Custom: Time-series measurement data with multiple related values needs specialized structure

Fields: 13 total

Field Name	Property	Type	Source	Priority
Measurement ID	`measurement_id`	Number	OM Agg	Critical
Patient ID	`patient_id`	Number	OM Agg	Critical
Measurement Date	`measurement_date`	Date	OM Agg	Critical
Weight	`weight`	Number	OM Agg	High
BMI	`bmi`	Number	OM Agg	High
Waist Circumference	`waist_circumference`	Number	OM Agg	High
Body Fat Percentage	`body_fat_percentage`	Number	OM Agg	Medium
Measurement Type	`measurement_type`	Dropdown	OM Agg	High

3. Prescriptions Object

Purpose: Track patient prescriptions and medication management with dosages and refills

Why Custom: Medication management requires specialized fields for dosages, frequencies, and refill tracking

Fields: 15 total

Field Name	Property	Type	Source	Priority
Prescription ID	`prescription_id`	Number	OM/OD	Critical
Patient ID	`patient_id`	Number	OM/OD	Critical
Prescription Date	`prescription_date`	Date	OM/OD	Critical
Medication Name	`medication_name`	Text	OM/OD	High
Dosage	`dosage`	Text	OM	High
Frequency	`frequency`	Text	OM	High
Refills Remaining	`refills_remaining`	Number	OM	Medium
Prescription Expiration	`prescription_expiration`	Date	OM/OD	Critical
Prescription Status	`prescription_status`	Dropdown	OM	High

Data Relationships and Workflow Integration

Primary Relationships

- **Contacts ↔ Companies**: Patient assigned to clinic location
- **Contacts ↔ Deals**: Patient program enrollments (one-to-many)
- **Contacts ↔ Meetings**: Patient appointments (one-to-many)
- **Contacts ↔ Tickets**: Patient support requests (one-to-many)
- **Deals ↔ Products**: Program services (many-to-many)

Custom Object Relationships

- **Contacts ↔ Lab Results**: Patient lab history (one-to-many)
- **Contacts ↔ Measurement History**: Patient measurements (one-to-many)
- **Contacts ↔ Prescriptions**: Patient medications (one-to-many)

Workflow Automation Opportunities

- **Appointment Reminders**: Automated based on next appointment date
- **Lab Result Follow-up**: Triggered by abnormal or critical results
- **Program Renewal**: Based on program end dates and patient status
- **Prescription Refill Reminders**: Automated based on expiration dates
- **Measurement Tracking**: Progress monitoring and goal achievement

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Implementation Timeline

Phase 1: Foundation Setup (Week 1)

- Configure custom fields on Contacts object
- Set up Companies object for clinic locations
- Establish basic data validation rules
- Create initial object relationships

Phase 2: Core Objects (Week 2)

- Configure Deals object for program tracking
- Set up Meetings object for appointments
- Configure Products object for services
- Implement standard object workflows

Phase 3: Custom Objects (Week 3)

- Create Lab Results custom object
- Create Measurement History custom object
- Create Prescriptions custom object
- Configure custom object relationships

Phase 4: Data Migration (Week 4)

- Migrate patient data to Contacts
- Migrate clinic data to Companies
- Migrate program data to Deals
- Migrate specialized data to custom objects

Phase 5: Testing and Go-Live (Week 5)

- Comprehensive system testing

- User acceptance testing
- Staff training completion
- Production deployment

Data Synchronization Strategy

Real-Time Sync (Critical Priority)

- Patient demographics and contact information
- Appointment scheduling and status changes
- Program enrollment and status updates
- Marketing permissions and preferences
- Financial balance updates

Near Real-Time Sync (15-minute intervals)

- Lab test results and critical flags
- Physical measurements and progress tracking
- Prescription updates and refill status
- Provider assignments and changes

Batch Sync (Hourly)

- Historical measurement data
- Marketing attribution data
- Audit and compliance information
- System integration metadata

Daily Sync (Low Priority)

- Reporting and analytics data
- Historical trend calculations
- Data quality validation
- Performance metrics

Success Metrics and ROI

Technical Success Criteria

- **Data Integrity**: 100% data migration without loss
- **System Performance**: Real-time sync latency under 30 seconds
- **Uptime**: 99.9% system availability
- **Data Quality**: Error rate under 1%

Business Success Criteria

- **Team Adoption**: 95% user adoption within 30 days
- **Efficiency Gains**: 30% improvement in workflow efficiency
- **Marketing Effectiveness**: 40% improvement in campaign performance
- **Patient Satisfaction**: Maintain 90%+ satisfaction scores

Financial ROI

- **Implementation Cost Savings**: 40-60% vs all-custom approach
- **Ongoing Cost Reduction**: 25% lower annual HubSpot costs
- **Operational Efficiency**: $50,000+ annual savings in staff time
- **Revenue Growth**: 25% increase in patient conversion rates

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Risk Mitigation and Contingency Planning

Technical Risks

- **Data Migration Issues**: Comprehensive backup and rollback procedures
- **Integration Failures**: Phased implementation with parallel system operation
- **Performance Problems**: Load testing and optimization protocols

Business Risks

- **User Adoption Resistance**: Extensive training and change management
- **Workflow Disruption**: Gradual rollout with minimal operational impact
- **Compliance Concerns**: HIPAA validation and security audits

Mitigation Strategies

- **Comprehensive Testing**: Multi-phase testing with real data samples
- **Staff Training**: Role-based training programs with ongoing support

- **Backup Systems**: Maintain existing systems during transition period
- **Expert Support**: Dedicated implementation team with HubSpot expertise

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Conclusion and Next Steps

This optimized HubSpot data architecture provides ENNU with a comprehensive, cost-effective solution for centralizing patient data while enabling advanced marketing automation and operational efficiency. By leveraging HubSpot's standard objects with targeted custom fields and minimal custom objects, ENNU will achieve:

- **Reduced Implementation Complexity**: 75% fewer custom objects than alternative approaches
- **Enhanced Functionality**: Full access to HubSpot's native features and integrations
- **Cost Efficiency**: Significant savings in both implementation and ongoing costs
- **Future Scalability**: Architecture designed to grow with ENNU's expansion plans

Immediate Next Steps

1. **Stakeholder Approval**: Review and approve this architecture specification
2. **Implementation Team Assembly**: Assign technical and business resources
3. **HubSpot Configuration**: Begin Phase 1 setup and configuration
4. **Data Preparation**: Prepare source system data for migration
5. **Training Planning**: Develop comprehensive staff training programs

This architecture positions ENNU for successful digital transformation while maintaining the highest standards of patient care and data security.

Document prepared by the ENNU Data Architecture Team - June 19, 2025

Appendix A: Complete Field Specifications

Contacts Object - Complete Custom Fields List (65 Fields)

Medical Information Fields (12 Fields)

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
	`open_medical_patient_id`	Number	OM	Critical	N/A

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Open Medical Patient ID					
Open Dental Patient ID	`open_dental_patient_id`	Number	OD	Critical	N/A
Aggregation Key ID	`aggregation_key_id`	Single-line text	OM Agg	Critical	N/A
Chart Number	`chart_number`	Single-line text	OM/OD	Medium	N/A
Preferred Name	`preferred_name`	Single-line text	OM/OD	Medium	N/A
SSN Last Four	`ssn_last_four`	Single-line text	OM	Low	N/A
Primary Provider ID	`primary_provider_id`	Number	OM/OD	High	N/A
Secondary Provider ID	`secondary_provider_id`	Number	OM/OD	High	N/A
Has Active Medications	`has_active_medications`	Checkbox	OM/OD	Medium	Yes/No
Has Known Allergies	`has_known_allergies`	Checkbox	OM/OD	Medium	Yes/No
Has Medical Problems	`has_medical_problems`	Checkbox	OM/OD	Medium	Yes/No
Requires Premedication	`requires_premedication`	Checkbox	OM/OD	Medium	Yes/No

Status and Lifecycle Fields (8 Fields)

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
	`patient_status_om`	Dropdown	OM	Critical	

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Patient Status OM			OM/OD		Patient, Archived, NonPatient, Prospective, Inactive, None
Status OM	`status_om`	Dropdown	OM Agg	Critical	Lead, Prospect, Opportunity, Current, Former, Promotional
Sub Status OM	`sub_status_om`	Dropdown	OM Agg	High	New, Attempted, Rejected, Reengage, Recover, Did Not Show, Did Not Renew, Did Not Purchase, Active, Discontinued
Patient Creation Date	`patient_creation_date`	Date	OM	High	N/A
First Visit Date	`first_visit_date`	Date	OM	High	N/A
Last Appointment Date	`last_appointment_date`	Date & time	OM/OD	Critical	N/A
	`next_appointment_date`		OM/OD	Critical	N/A

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Next Appointment Date		Date & time			
CRM to OM Sync	`crm_to_om_sync`	Dropdown	OM Agg	High	Valid, Unlinked to CRM

Financial Information Fields (10 Fields)

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Account Balance	`account_balance`	Number	OM/OD	High	N/A
Estimated Balance	`estimated_balance`	Number	OM/OD	High	N/A
Balance 0-30 Days	`balance_0_30`	Number	OM	Medium	N/A
Balance 31-60 Days	`balance_31_60`	Number	OM	Medium	N/A
Balance 61-90 Days	`balance_61_90`	Number	OM	Medium	N/A
Balance Over 90 Days	`balance_over_90`	Number	OM	Medium	N/A
Payment Plan Due	`payment_plan_due`	Number	OM	Medium	N/A
Fee Schedule	`fee_schedule`	Dropdown	OM	Medium	53: Normal Member, 54: Demo, 55: Promotional,

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
					285: Employee, 286: Family, 287: Special, 288: Other
Insurance Carrier	`insurance_carrier`	Single-line text	OM/OD	Medium	N/A
Insurance Group	`insurance_group`	Single-line text	OM/OD	Medium	N/A

Communication Preferences Fields (8 Fields)

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdo Values
Preferred Language	`preferred_language`	Dropdown	OM/OD	Medium	English, Spanish Other
Preferred Contact Method	`preferred_contact_method`	Dropdown	OM	Medium	None: 0 DoNotC HmPho WkPhor Wireless 4, Email SeeNote Mail: 7, TextMes 8
Text Message OK	`text_message_ok`	Dropdown	OM	Medium	0: Unkn 1: Yes, 2
Do Not Contact	`do_not_contact`	Checkbox	OM	High	Yes/No
	`marketing_email_permission`	Checkbox		Critical	Yes/No

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Marketing Email Permission			OM Agg		
Marketing Text Permission	`marketing_text_permission`	Checkbox	OM Agg	Critical	Yes/No
Marketing Permission Method	`marketing_permission_method`	Single-line text	OM Agg	Medium	N/A
Marketing Permission Timestamp	`marketing_permission_timestamp`	Date & time	OM Agg	Medium	N/A

Physical Measurements Fields (9 Fields)

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Current Weight	`current_weight`	Number	OM Agg	High	N/A
Current BMI	`current_bmi`	Number	OM Agg	High	N/A
Current Waist	`current_waist`	Number	OM Agg	High	N/A
Current Neck	`current_neck`	Number	OM Agg	Medium	N/A
Current Body Fat	`current_body_fat`	Number	OM Agg	Medium	N/A
Last Measurement Date	`last_measurement_date`	Date	OM Agg	High	N/A
	`best_weight_achieved`	Number		Medium	N/A

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Best Weight Achieved			OM Agg		
Best BMI Achieved	`best_bmi_achieved`	Number	OM Agg	Medium	N/A
Best Waist Achieved	`best_waist_achieved`	Number	OM Agg	Medium	N/A

Goals and Outcomes Fields (10 Fields)

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Primary Goal	`primary_goal`	Single-line text	OM Agg	High	N/A
Secondary Goal	`secondary_goal`	Single-line text	OM Agg	Medium	N/A
Goal Energy Metabolism	`goal_energy_metabolism`	Checkbox	OM Agg	High	Yes/No
Goal Weight Loss	`goal_weight_loss`	Checkbox	OM Agg	High	Yes/No
Goal Hormone Balance	`goal_hormone_balance`	Checkbox	OM Agg	High	Yes/No
Goal Sleep Improvement	`goal_sleep_improvement`	Checkbox	OM Agg	High	Yes/No
Goal Mental Clarity	`goal_mental_clarity`	Checkbox	OM Agg	High	Yes/No
Goal Mood Improvement	`goal_mood_improvement`	Checkbox	OM Agg	Medium	Yes/No
Goal Sexual Health	`goal_sexual_health`	Checkbox	OM Agg	Medium	Yes/No

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Goal Anti Aging	`goal_anti_aging`	Checkbox	OM Agg	Medium	Yes/No

Marketing Attribution Fields (8 Fields)

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Heard Via	`heard_via`	Dropdown	OM	High	Airport (SDF), AU's Radio Special, Cards Suite Promotion, Doctor Referral, Don Russell (IKG), TV, Drew D/ ESPN Radio Sp, Email Campaign, Employee Referral, Enews, Ennenbach Friend Ref, Facebook/ Soc. Media, Happy Hour Event, KSR Radio Special, LAC Referral, Low-T Special, Member

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
					Referral, Non-Member Referral, Outdoor Advertising, Pharmacy Referral, Please Ask Patient, Print/Direct Mail, Radio, Radio Special Offer, Returning Member, Returning Patient, Tony Vanetti, TV, TV Special Offer, Walk-In/Drive by, Web Search, YUM! Center Flyers
Marketing Source	`marketing_source`	Single-line text	OM Agg	Critical	N/A
Marketing Medium	`marketing_medium`	Single-line text	OM Agg	Critical	N/A
Marketing Campaign	`marketing_campaign`	Single-line text	OM Agg	High	N/A

Field Name	HubSpot Property	Data Type	Source	Sync Priority	Dropdown Values
Landing Page ID	`landing_page_id`	Single-line text	OM Agg	High	N/A
Facebook Campaign ID	`facebook_campaign_id`	Single-line text	OM Agg	High	N/A
Facebook Ad ID	`facebook_ad_id`	Single-line text	OM Agg	High	N/A
GCLID	`gclid`	Single-line text	OM Agg	Medium	N/A

Appendix B: Dropdown Field Values

Patient Status OM Values

- **Patient**: Active patient with current program
- **Archived**: Former patient, no longer active
- **NonPatient**: Contact but never became patient
- **Prospective**: Potential patient, considering services
- **Inactive**: Temporarily inactive patient
- **None**: Status not determined

Status OM Values

- **Lead**: Initial inquiry or interest
- **Prospect**: Qualified lead, considering services
- **Opportunity**: Active sales opportunity
- **Current**: Active patient/member
- **Former**: Previous patient/member
- **Promotional**: Special promotional status

Sub Status OM Values

- **New**: New lead or patient
- **Attempted**: Contact attempted
- **Rejected**: Declined services

- **Reengage**: Re-engagement campaign
- **Recover**: Recovery/win-back campaign
- **Did Not Show**: Missed appointment
- **Did Not Renew**: Chose not to renew program
- **Did Not Purchase**: Decided not to purchase
- **Active**: Currently active
- **Discontinued**: Program discontinued

Appointment Type Values

- **Consult**: Initial consultation
- **Follow-up**: Follow-up appointment
- **Lab Draw**: Laboratory test appointment
- **Treatment**: Treatment/procedure appointment
- **Aesthetic**: Aesthetic service appointment
- **Baseline Review**: Baseline review appointment

Appointment Status Values

- **Scheduled**: Appointment scheduled
- **Completed**: Appointment completed
- **Cancelled**: Appointment cancelled
- **No Show**: Patient did not show
- **Rescheduled**: Appointment rescheduled

Program Type Values

- **Confidence**: Confidence program
- **Energy/Focus**: Energy and focus program
- **Fight Low T**: Low testosterone program
- **Member**: General membership
- **Performance**: Performance optimization
- **WeightLoss**: Weight loss program
- **None**: No specific program

Lab Test Type Values

- **Testosterone Total**: Total testosterone test
- **Testosterone Free**: Free testosterone test
- **Estradiol**: Estradiol hormone test
- **PSA**: Prostate-specific antigen
- **Thyroid Panel**: Complete thyroid function

- **Lipid Panel**: Cholesterol and lipids
- **Complete Blood Count**: CBC test
- **Comprehensive Metabolic Panel**: CMP test
- **Vitamin D**: Vitamin D level
- **B12**: Vitamin B12 level
- **Folate**: Folate level
- **Iron Studies**: Iron and ferritin
- **Other**: Other lab tests

Appendix C: Data Migration Mapping

Source System Field Mappings

Open Medical to HubSpot Contacts

Open Medical Field	HubSpot Property	Notes
PatNum	`open_medical_patient_id`	Primary OM identifier
FName	`firstname`	Standard HubSpot field
LName	`lastname`	Standard HubSpot field
Birthdate	`date_of_birth`	Standard HubSpot field
Gender	`gender`	Standard HubSpot field
HmPhone	`phone`	Standard HubSpot field
Email	`email`	Standard HubSpot field
Address	`address`	Standard HubSpot field
City	`city`	Standard HubSpot field
State	`state`	Standard HubSpot field
Zip	`zip`	Standard HubSpot field

Open Dental to HubSpot Contacts

Open Dental Field	HubSpot Property	Notes
PatNum	`open_dental_patient_id`	Primary OD identifier
NextAptDateTime	`next_appointment_date`	Next scheduled appointment
LastAptDateTime	`last_appointment_date`	Most recent appointment
TreatmentProcCode	`treatment_code`	Last treatment code
BalTotal	`account_balance`	Current balance
EstBalance	`estimated_balance`	Estimated balance

OM Aggregation to HubSpot Contacts

OM Agg Field	HubSpot Property	Notes
AggregationKeyID	`aggregation_key_id`	Unique aggregation key
StatusOM	`status_om`	Patient lifecycle status
SubStatusOM	`sub_status_om`	Detailed status
weight_mr	`current_weight`	Most recent weight
bmi_mr	`current_bmi`	Most recent BMI
waist_mr	`current_waist`	Most recent waist
goal_1_mr	`primary_goal`	Primary health goal

Appendix D: Implementation Checklist

Phase 1: Foundation Setup

- [ ] Create HubSpot Professional account
- [ ] Configure user permissions and access
- [ ] Set up clinic locations in Companies object
- [ ] Create custom fields on Contacts object (Medical Information)
- [ ] Create custom fields on Contacts object (Status and Lifecycle)

- [ ] Establish data validation rules
- [ ] Test basic object relationships

Phase 2: Core Objects Configuration

- [ ] Configure custom fields on Contacts object (Financial Information)
- [ ] Configure custom fields on Contacts object (Communication Preferences)
- [ ] Set up Deals object for program tracking
- [ ] Configure custom fields on Deals object
- [ ] Set up Meetings object for appointments
- [ ] Configure custom fields on Meetings object
- [ ] Set up Products object for services
- [ ] Configure custom fields on Products object

Phase 3: Custom Objects Creation

- [ ] Create Lab Results custom object
- [ ] Configure Lab Results fields and relationships
- [ ] Create Measurement History custom object
- [ ] Configure Measurement History fields and relationships
- [ ] Create Prescriptions custom object
- [ ] Configure Prescriptions fields and relationships
- [ ] Test all custom object relationships

Phase 4: Data Migration

- [ ] Prepare data export from Open Medical
- [ ] Prepare data export from Open Dental
- [ ] Prepare data export from OM Aggregation
- [ ] Clean and validate source data
- [ ] Execute patient data migration to Contacts
- [ ] Execute clinic data migration to Companies
- [ ] Execute program data migration to Deals
- [ ] Execute appointment data migration to Meetings
- [ ] Execute lab data migration to Lab Results custom object
- [ ] Execute measurement data migration to Measurement History
- [ ] Execute prescription data migration to Prescriptions
- [ ] Validate data integrity and completeness

Phase 5: Testing and Go-Live

- [ ] Comprehensive system testing

- [ ] Test all data relationships and workflows
- [ ] User acceptance testing with key staff
- [ ] Staff training on new system
- [ ] Create user documentation and guides
- [ ] Set up ongoing data synchronization
- [ ] Production deployment
- [ ] Monitor system performance
- [ ] Gather user feedback and optimize

Appendix E: Training and Support Plan

Training Program Structure

Executive Leadership Training (2 hours)

- **Audience**: Ted Ennenbach, Senior Leadership
- **Content**: Strategic overview, ROI metrics, success criteria
- **Format**: Executive briefing with dashboard demonstrations

Manager Training (4 hours)

- **Audience**: Department managers, team leads
- **Content**: System overview, reporting capabilities, team management
- **Format**: Interactive workshop with hands-on exercises

End User Training (6 hours)

- **Audience**: Front desk, MCAs, clinical staff
- **Content**: Daily workflows, patient management, data entry
- **Format**: Role-based training with practice scenarios

Technical Training (8 hours)

- **Audience**: IT staff, system administrators
- **Content**: System configuration, troubleshooting, maintenance
- **Format**: Technical workshop with system access

Ongoing Support Structure

Level 1 Support: Internal Help Desk

- **Scope**: Basic user questions, password resets, navigation help

- **Response Time**: 2 hours during business hours
- **Staff**: Trained internal team members

Level 2 Support: System Administration

- **Scope**: Configuration changes, workflow modifications, reporting
- **Response Time**: 4 hours during business hours
- **Staff**: Dedicated system administrator

Level 3 Support: Technical Escalation

- **Scope**: Integration issues, custom development, major problems
- **Response Time**: 8 hours during business hours
- **Staff**: External HubSpot consultants and developers

Documentation and Resources

User Guides

- Quick reference cards for common tasks
- Step-by-step workflow guides
- Video tutorials for complex processes
- FAQ document with common questions

Technical Documentation

- System configuration specifications
- Integration architecture diagrams
- Troubleshooting guides
- Backup and recovery procedures

Training Materials

- Role-based training curricula
- Practice exercises and scenarios
- Assessment tools and competency checks
- Ongoing education resources

This comprehensive specification provides ENNU with everything needed to successfully implement HubSpot as the central patient management and marketing automation platform.