

ENNU Digital Transformation - Friday Meeting Update

Date: June 20, 2025

Attendees: Luis Escobar (Growth Engineer), Ted Ennenbach, Steven Bennett, Kegan Wesley, Renzo Mogrovejo, Brian Hyatt

Executive Summary

Luis completed his first week and presented comprehensive progress on the digital transformation initiative. The meeting focused on data migration strategy, lead magnet development, membership restructuring, and immediate next steps for implementation.

▮ Data Migration Progress

Current Status

- **165 fields identified** from 16M records in Suite CRM export
- **7 standard HubSpot objects** to be enhanced with new fields
- **3 new custom objects** to be created: Measurement History, Telehealth, Lab Results
- **MINDBODY integration** required for complete data picture

Key Decisions

- **Phased approach:** Prioritize last 3 years of data first to enable immediate automation work
- **Steven Bennett** assigned as technical lead for field mapping and creation
- **AI-assisted mapping** will handle 95% of field assignments, manual review for remaining 5%

Action Items

- [] **Luis:** Process MINDBODY export through AI mapping system
- [] **Steven:** Create all required fields in HubSpot (target: end of next week)
- [] **Kegan:** Create MINDBODY staff account for Luis (alescobar@enu.co, 305-619-5599)
- [] **Steven:** Share fee schedules and procedure codes from Open Dental

▯ Lead Magnets & Website Assets

Completed Assets (Ready for Review)

1. **Complete Weight Loss Assessment** - Interactive quiz with personalized BMI recommendations
2. **Personalized Health Survey** - Hormone optimization focused assessment
3. **Membership Value Calculator** - Shows cost savings for bundled services
4. **Optimal Health Assessment** - \$599 standalone package (positioned as membership driver)
5. **Smart Booking System** - Streamlined 2-step appointment process
6. **Products & Supplement Store** - A la carte purchasing capability

Feedback Required

- **Content review** for medical accuracy and language refinement
- **Pricing validation** across all service offerings
- **High-quality imagery** selection for professional brand presentation
- **Membership structure** optimization and naming conventions

▯ Membership Structure Refinement

Current Challenge

- **Naming confusion:** "Telehealth" vs "In-Person" lacks marketing appeal
- **Complex options:** Too many choices creating decision paralysis
- **Pricing strategy:** Need better positioning against \$599 assessment

Proposed Solutions

- **Rebrand memberships:** Move away from "Telehealth" to more appealing names
- **Simplified tiers:** Good/Better/Best structure based on patient goals and demographics
- **Age-based recommendations:** Tailor offerings to specific age groups and objectives
- **Add-on structure:** Base membership + location-based benefits

Action Items

- [] **Team:** Map out complete membership portfolio (including aesthetic, senior, junior)
- [] **Luis:** Design recommendation algorithm based on quiz responses
- [] **Ted:** Provide guidance on age-based service recommendations

▮ Booking System Improvements

Technical Challenges Identified

- **Multi-provider scheduling:** Different providers (esthetician vs injector) for same appointment
- **Calendar complexity:** Single provider across multiple locations
- **Cross-selling opportunities:** Bundle appointments with discounts

Current Workarounds

- **Outlook integration:** All provider calendars connected to HubSpot
- **Master calendar access:** updates@enu.co for centralized management
- **Manual coordination:** Required for complex multi-service appointments

Future Enhancements

- **Custom WordPress booking:** More flexibility for complex scenarios
- **Webhook integration:** Real-time updates across systems
- **Package deals:** Tiered discounts for multiple service bookings

▮ Immediate Next Steps (Next 48-72 Hours)

Luis's Priorities

1. **Data mapping completion** using MINDBODY export
2. **Field specification document** for HubSpot object creation
3. **Timeline refinement** for marketing alignment

Team Deliverables

- **Steven:** MINDBODY developer access + recent data dump sharing
- **Kegan:** Example client profile emails + MINDBODY account setup
- **Brian:** Current ad campaign review session (scheduled Saturday)
- **Renzo:** Calendar integration access (updates@enu.co)

⚠ Critical Dependencies

Immediate Blockers

- **Suite CRM access recovery** - Essential for preventing data loss
- **Complete membership documentation** - Required for accurate pricing/features
- **Brand asset creation timeline** - Impacts website launch readiness

Technical Requirements

- **Stripe account notification** for new domain (ennulife.com)
- **CloudFlare DNS finalization**
- **HIPAA compliance verification** before patient data migration

▮ Success Metrics & Timeline

Week 1 Achievements ✓

- Data mapping methodology established
- Lead magnet prototypes completed
- Technical architecture defined
- Team responsibilities assigned

Week 2 Goals

- **All HubSpot fields created** (Steven/team effort)
- **First phase data migration** (3-year priority dataset)
- **Website asset refinement** based on team feedback
- **Marketing campaign alignment** (Brian/Luis collaboration)

Monthly Projection

- **Month 1:** Foundation setup and legacy data recovery
- **Month 2:** Core integrations and patient portal development
- **Month 3:** Advanced features (Life Score, AI Health Podcast, referral system)

▮ Key Insights from Discussion

Competitive Positioning

- **Life Force comparison:** Similar approach but with significantly more funding
- **Biohacking trend:** Growing market interest in health optimization scores
- **Technology differentiation:** AI-powered personalization as key advantage

Cross-Selling Opportunities

- **Medical + Aesthetic integration:** Bundle services at booking for immediate discounts
- **Age-based targeting:** Tailor service recommendations to demographic profiles
- **Membership upsell:** Position assessment pricing to drive membership adoption

▯ Weekend & Monday Priorities

Immediate Actions

- **Luis:** AI processing of complete dataset + field specification delivery
- **Steven:** Fee schedule documentation + field creation preparation
- **Brian:** Ad campaign review session (Saturday)
- **Kegan:** MINDBODY account setup completion

Early Next Week

- **HubSpot field creation** sprint begins
- **Marketing timeline alignment** finalized
- **Website asset feedback** integration
- **First automation sequences** development start

Meeting concluded at 6:00 PM with strong momentum and clear next steps. Team committed to weekend preparation work to enable aggressive Monday sprint.