

Joint Relief Institute Case Study



Company Profile:

The Joint Relief Institute is a specialized healthcare provider in North America, focused on offering non-surgical knee pain relief treatments using cutting-edge medical technologies. At the time of the project, the institute utilized technologies such as Sales Cloud, and Marketing Cloud to manage their patient data and outreach efforts.

The Challenges:

The Joint Relief Institute was using Marketing Cloud primarily for basic patient communications, such as appointment reminders and follow-up messages. However, they faced several challenges in automating patient management processes and lacked a cohesive strategy for managing leads across various channels. They needed a system that could integrate patient data seamlessly between Marketing Cloud and Sales Cloud to improve their marketing efforts, maintain clean data, and enable better patient journey management.

The institute identified five key objectives:

- Streamlining the patient lead process in Sales Cloud to maintain accurate records.
- Automating the import of patient leads from multiple healthcare sources while ensuring data integrity within Sales Cloud.
- Developing a custom campaign UI that would allow the medical team to easily create and track patient outreach campaigns.
- Leveraging dynamic content to send personalized communication based on patient profiles, and tracking campaign performance through Sales Cloud.
- Gaining deep insights into their patient data by tracking lead sources and guiding patients through tailored email journeys based on these lead sources.

They needed a solution that could segment patient leads, manage patient journeys, and allow them to conduct personalized outreach campaigns effectively. The team also required extensive documentation and training to help them adopt new processes.

Solution Implementation:

The solution focused on optimizing integration between Marketing Cloud and Sales Cloud. The approach included:

- Creating a streamlined patient management system in Sales Cloud to capture, segment, and maintain accurate lead records.
- Automating the import of patient data from various sources directly into Sales Cloud, ensuring de-duplication and maintaining data integrity.
- Developing a custom campaign UI, enabling the marketing team to create and track patient outreach campaigns and associated metadata within Sales Cloud.
- Implementing dynamic content for personalized communication with patients based on their lead source and healthcare profile, tracked through both Sales Cloud and Marketing Cloud.
- Providing comprehensive documentation and training for the marketing and medical teams to ensure a smooth adoption of the new processes.

Results:

Within one month, the Joint Relief Institute successfully integrated over 100,000 patient leads, with accurate lead source tracking into Sales Cloud. Of these, 80,000 were new patients, and the leads were automatically de-duplicated and segmented.

The automated email journeys significantly improved patient engagement, resulting in higher appointment and treatment conversion rates. The custom campaign UI made it easier for the marketing and medical teams to create and track outreach efforts, allowing them to report results directly to senior management.