

Connecting the Dots

How TelyRx Unified SMS, Shipment, and Service Operations in HubSpot

CLIENT CASE STUDY

SALES MARKETING AUTOMATION



Client Overview: TelyRX

TelyRX operates in the telehealth and pharmacy space, where timely, accurate communication is not a convenience — **it is part of the customer experience patients depend on.**

As order volume and patient communication needs grew, TelyRX needed its HubSpot environment to keep pace with the operational complexity of coordinating SMS messaging, shipment updates, and service visibility across multiple teams.

The Challenge

Before partnering with Sales Marketing Automation, TelyRX's HubSpot setup had several operational gaps creating friction across teams and slowing the customer experience.

Manual SMS Communications

SMS was not automated around order and shipment events — patients did not always receive timely order status updates.

Fragmented Team Visibility

Marketing, sales, and customer service each had a partial view of order and customer activity, without a shared, reliable source of truth.

Disjointed Reporting

Reporting on order status and customer communications was fragmented, making it difficult for leadership to see the full picture.

Untracked Referrals

Referral activity from third-party sources was not cleanly integrated into HubSpot, leaving a gap in how referral-driven customers were tracked and reported on.

The Stakes at Scale

The result was a system that could technically handle day-to-day operations, but without the automation, visibility, and integration depth needed to support TelyRX confidently at scale.

Automation Gap

SMS communications were not fully automated around order and shipment events

Visibility Gap

Teams lacked a shared, reliable source of truth to work from

Integration Gap

Referral activity was not cleanly integrated into HubSpot

As volume increased, underlying system performance and configuration had not been revisited closely enough to keep pace with TelyRX's growth.

Our Approach

Sales Marketing Automation structured this engagement around four core operational touchpoints driving the customer experience and internal visibility.

1

SMS Automation

Shipment and order communications

2

Cross-Team Reporting

Shared visibility across departments

3

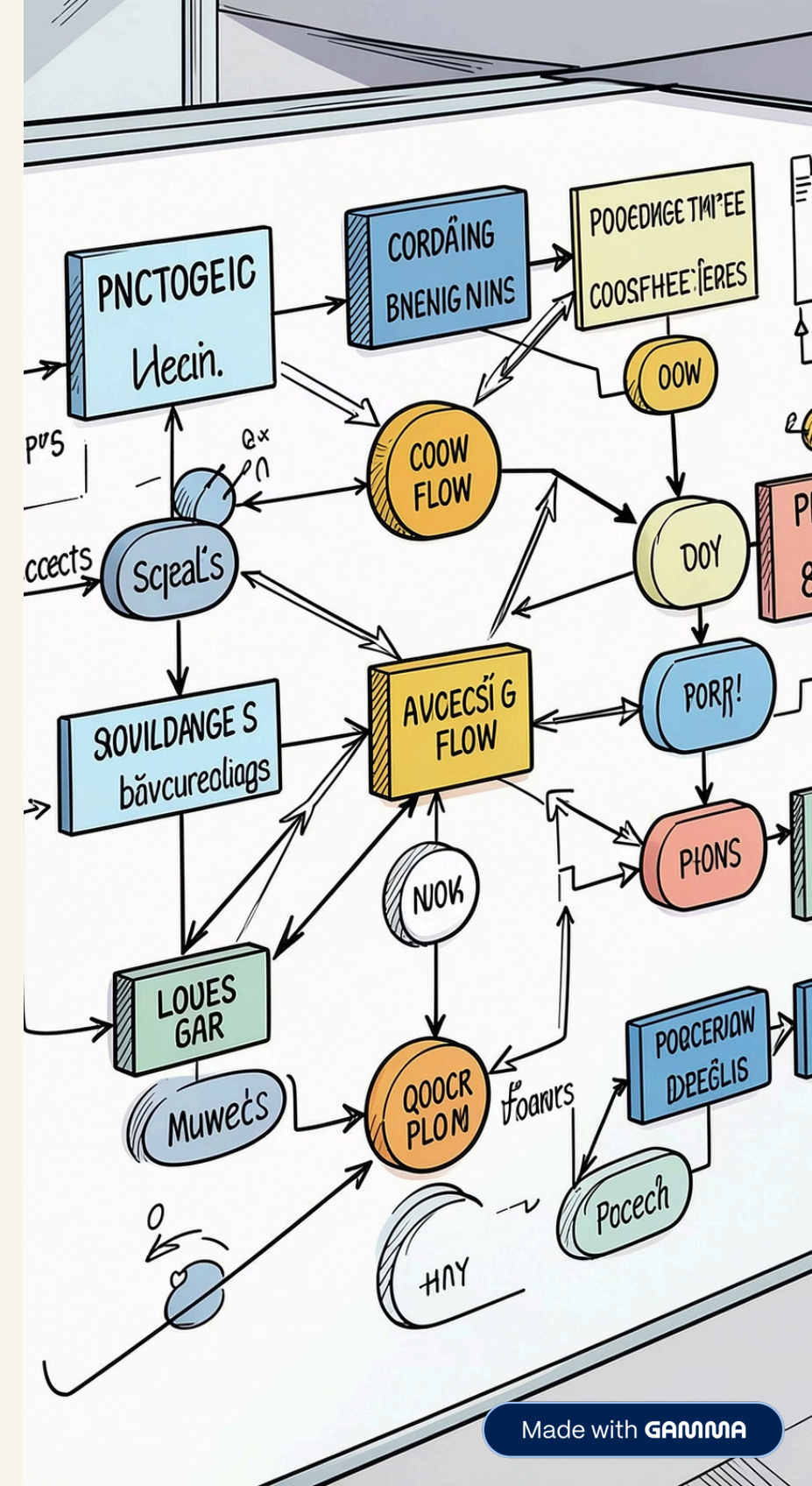
System Performance

Enhancement and optimization

4

Third-Party Integrations

Referral tracking and attribution



SOLUTION 01

SMS Automation for Shipment & Orders



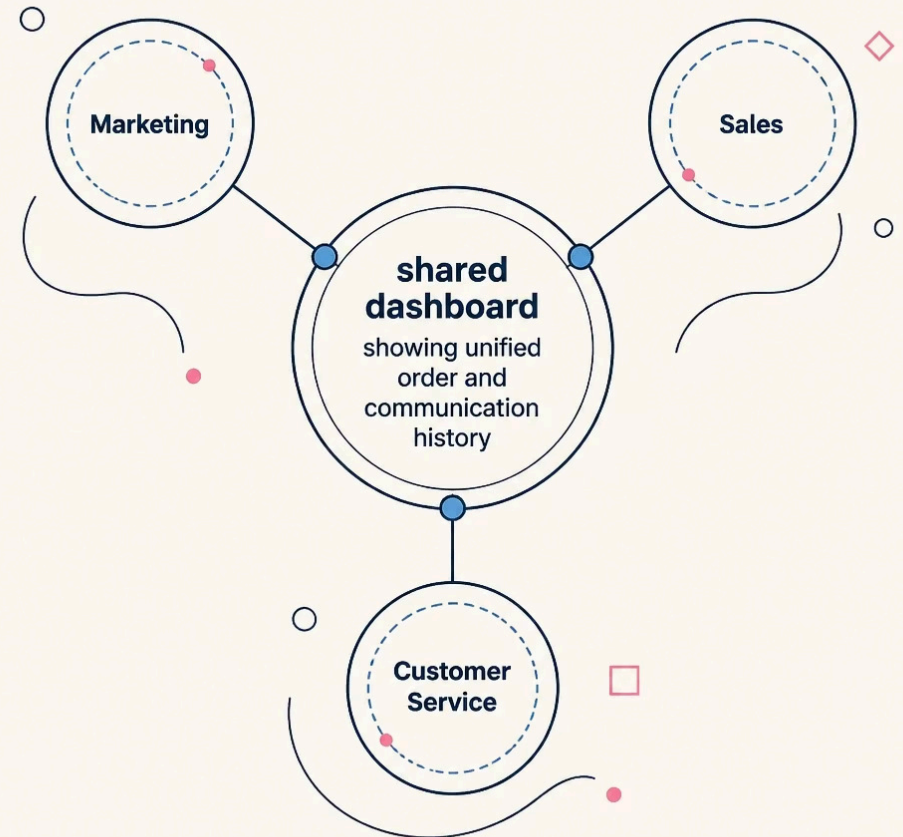
We built and optimized SMS workflows tied directly to shipment and order milestones, so patients receive timely, automatic updates as their orders move through fulfillment.

This reduced the need for manual outreach and gave the team a consistent, dependable communication layer that runs in the background rather than requiring constant manual triggering.

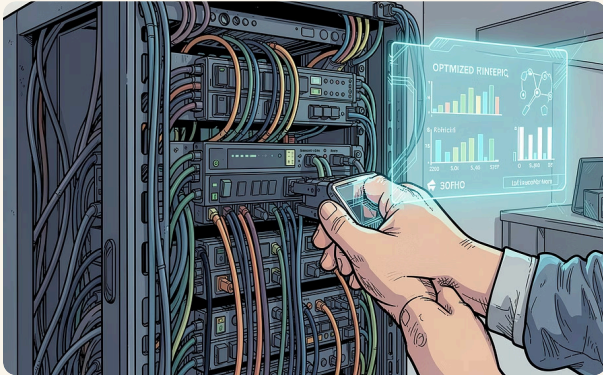
Cross-Team Reporting Visibility

We rebuilt reporting so that marketing, sales, and customer service teams could each see order and communication activity from a shared, consistent set of data.

Rather than each team working from its own partial view, dashboards were structured so customer service could see the same order and communication history that marketing and sales relied on, reducing back and forth between teams and giving every team a clearer picture of where a customer stood in their journey.

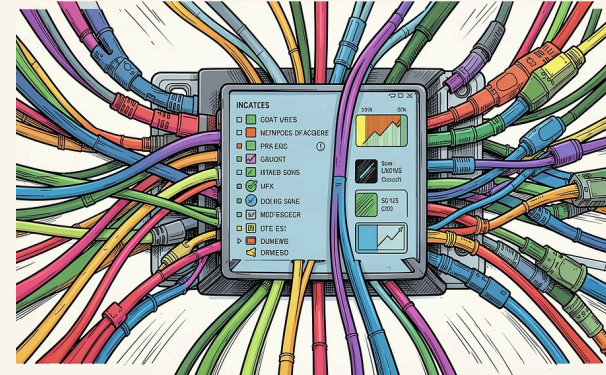


System Performance & Referral Integrations



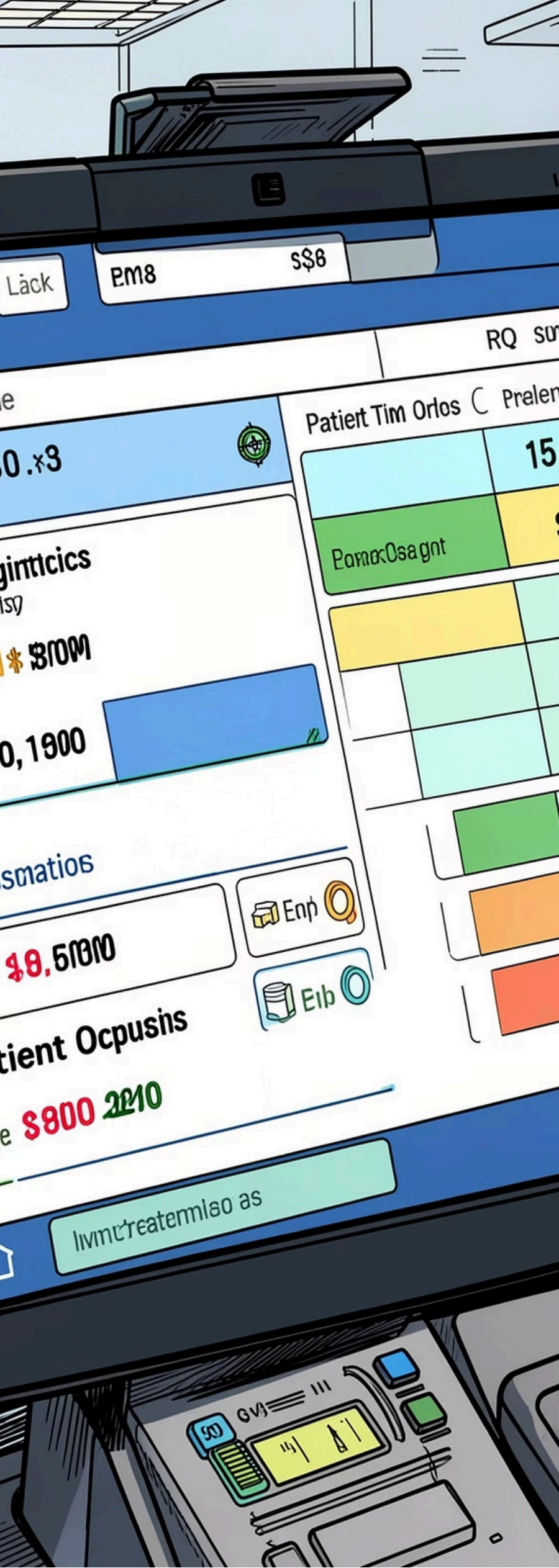
System Enhancement

We reviewed the underlying configuration of TelyRX's HubSpot portal, identifying and resolving performance bottlenecks, refining workflow logic, and tightening system settings to support higher volume and more complex automation without sacrificing speed or reliability.



Referral Tracking

We connected TelyRX's referral sources directly into HubSpot through third-party integrations, ensuring referral-driven customers were properly attributed, tracked, and reported on alongside other acquisition channels. This gave TelyRX a clearer, more complete view of how referrals contributed to overall growth.



The Outcome

Following the engagement, TelyRX's HubSpot environment functions as a connected operational hub rather than a collection of disconnected tools.



Automated Patient Comms

Patients receive timely, automated communication around their orders and shipments



Shared Team Visibility

Marketing, sales, and customer service work from shared visibility into order and communication activity, reducing friction between departments



Optimized Infrastructure

The underlying system runs more efficiently to support TelyRX's growing volume



Integrated Referrals

Referral activity is now clearly tracked and integrated rather than existing outside the core system

The engagement positioned TelyRX's HubSpot portal as infrastructure that supports both the operational demands of pharmacy fulfillment and the cross-team visibility leadership needs to manage the business with confidence.

Why It Matters

For telehealth and pharmacy businesses, communication and reporting are not just marketing functions — **they directly shape patient experience and trust.**

TelyRX's experience reflects a broader pattern: as volume and complexity grow, **communication automation, cross-team visibility, and system performance need to scale together** — not as an afterthought once friction has already affected the customer experience.

About Sales Marketing Automation

A multi-platform marketing automation consultancy helping clients across HubSpot, Salesforce, Go High Level, Klaviyo, and other CRM and marketing platforms build smarter systems and more reliable campaigns.

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