

Cost-Effective Database Management and Email Campaigns for a Home Health EMR Provider

The Client

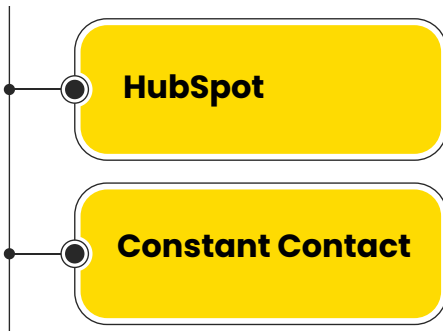
Anonymous EMR Solution Provider offers PowerPath, an electronic medical records (EMR) solution designed for home health agencies to optimize Medicare's Value-Based Purchasing (VBP) outcomes. The platform provides real-time tracking of OASIS outcomes, automated patient care plans, and strategies to reduce ER visits and hospitalizations. It ensures better patient management, improved Medicare reimbursement, and increased referral opportunities, along with support and training to help agencies achieve compliance and maximize performance under Medicare's guidelines.



The Problem



The Tech Stack



Our Approach

We conducted a comprehensive audit of the client's HubSpot setup:

- **Database Audit:** Analyzed total contacts, companies, deals, and lists.
- **Email Audit:** Reviewed all marketing and transactional emails.
- **Marketing Campaigns Audit:** Evaluated email and other marketing campaigns.

Following the audit, we documented our findings and initiated a cleanup process. We segmented the database into two key components:

- **Primary Database:** 2,000 contacts in HubSpot who were actively engaging with emails.
- **Secondary Database:** 40,000 contacts moved to Constant Contact, a more cost-effective platform without automation features like HubSpot.

The Solution

Our primary objective was to create a cost-effective system that leveraged both platforms to maximize engagement while minimizing expenses:

ICP Creation: Developed Ideal Customer Profiles (ICPs) for two sets:

- **Primary Database (HubSpot):** Engaged contacts who open and click emails.
- **Secondary Database (Constant Contact):** Contacts less engaged but still valuable.

Database Cleanup: Removed junk data, empty fields, and unsubscribed data to reduce HubSpot costs.

Workflow Automation: Created workflows to automate the process of marking non-marketing contacts, ensuring future cost savings and data cleanliness.

Dynamic Contact Transfer System:

- We established a system for transferring contacts between platforms based on engagement behavior. Contacts not opening emails in HubSpot were moved to Constant Contact. Conversely, engaged contacts in Constant Contact were transferred back to HubSpot.
- This dynamic transfer system allowed us to maintain an active contact list in HubSpot while utilizing Constant Contact for less engaged contacts at a lower cost.

Email Campaigns: Developed separate email campaigns for each target audience using plain-text emails that appeared to be sent directly from a salesperson's Outlook/Gmail. Synced salesperson calendars with HubSpot to include "Book a Meeting" CTAs in all emails.

Dashboard Preparation: Prepared comprehensive dashboards for the client to provide a bird's-eye view of progress. The dashboards included data reports from:

- Email Marketing
- Deals Creations
- Website Visitors from Emails
- Workflow Stats
- LinkedIn and YouTube Channel Feed



Impact and Outcomes

- **Cost Savings:** The strategic use of both platforms resulted in a 75% reduction in costs by moving 40K contacts to Constant Contact while maintaining high engagement levels through HubSpot.
- **Increased Engagement:** Achieved a 73% email open rate with an 80.5% increase in CTA engagement.
- **Meeting Bookings:** Booked 60 meetings per month.
- **Strategic Growth:** Streamlined marketing efforts supported new growth phases with an MQL, SQL, and deals-based system alongside live dashboards for tracking progress.

This approach not only optimized the client's database management but also significantly reduced costs while enhancing their email marketing effectiveness.

