

Revitalizing Healthcare Customer Engagement with Salesforce Marketing Cloud



salesforce



Location
USA



Client
Healthcare



Solution
Xylity Technologies utilized Salesforce Marketing Cloud to boost the client's healthcare customer engagement strategy



Result
Enhanced patient engagement and improved service quality

About the Client

We had the opportunity to collaborate with a renowned healthcare organization based in the United States that heavily relies on donors. Known for their commitment to exceptional donor relations and high-quality service, the client has established a significant presence in the healthcare sector. Despite their strong reputation, they recognized the necessity to continually evolve in a fast-paced digital landscape, especially in their donor engagement and retention strategy..

The Challenge

Despite having a clear vision, the client's existing donor engagement strategy was not delivering the desired results. Their communication campaigns were experiencing low open rates and click-through rates, impacting their overall donor engagement and retention.

They faced the following challenges:

Lack of Personalization: Their existing communication campaigns were too generic and failed to resonate with their diverse donor base. They lacked the tools and insights to create content tailored to individual donor behavior and preferences.

Inefficient Outreach Processes: They were manually managing their communication campaigns, which was time-consuming and prone to errors. There was a need for automation to streamline processes like sending event reminders and follow-ups.

Client's Goal

Our client sought to improve donor engagement, boost retention, and set themselves up for scalable growth by enhancing their donor communication strategy. Their goal was to utilize data-driven insights to deliver targeted and relevant content to their donors while optimizing their marketing campaigns. They believed in the power of personalized communication and were committed to delivering content that resonated with their donor base.



Data Silos: Donor data was scattered across multiple sources, hindering a holistic view of donor behavior, which was crucial for their communication campaigns.

Inadequate Analytics: Their current analytics tools were not providing comprehensive insights they needed to measure the effectiveness of their campaigns and make data-driven decisions.

Our Solution

The solution we provided included several critical components to address the client's needs:

Personalization: Using Salesforce Marketing Cloud, we crafted personalized communication campaigns based on donor behavior and preferences. This tailored approach resulted in higher engagement.

Automation: We automated the process for triggered emails based on donor behavior. This not only streamlined the client's outreach efforts but also ensured timely communication with donors.

Campaign Management: Salesforce Marketing Cloud provided a centralized platform for managing communication campaigns. The client could create, schedule campaigns, track performance metrics, and analyze results all in one place.

Data Integration: We integrated donor data from multiple sources into Salesforce Marketing Cloud. This comprehensive view of donor data enabled the client to create more targeted and personalized campaigns.



Results

The implementation of Salesforce Marketing Cloud led to substantial improvements in the client's donor engagement and retention strategy:

Enhanced Donor Engagement: The personalized communication campaigns led to a 35% increase in email open rates and a 25% increase in click-through rates, indicating a significantly higher level of donor engagement.

Improved Donor Retention: The delivery of relevant content and improved communication resulted in a 20% improvement in donor retention rates. Donors felt more valued, leading to increased loyalty and long-term support.

Scalable Growth: With Salesforce's automated campaign management and robust analytics tools, the client was well-equipped for scalable growth. They increased their campaign volume by 50% while maintaining efficiency and quality.

Streamlined Outreach Processes: Automation of processes saved the client a significant amount of time, reducing the time spent on manual tasks by 40%.

Implementation Process

With the challenges in mind, our team at Xylity Technologies devised a strategic plan to leverage Salesforce Marketing Cloud to its full potential for the client.

Here's how we approached it:

Requirement Gathering: We began with a series of meetings to understand the client's specific requirements, the challenges they were facing, and their goals for their donor engagement strategy.

Solution Design: Based on the client's needs, we designed a solution using Salesforce Marketing Cloud. This included creating a framework for personalized communication campaigns, setting up automation for email triggers, and integrating donor data.

Development and Integration: Our team then developed the personalized communication campaigns and set up the automation processes. We integrated the client's donor data within Salesforce Marketing Cloud, providing a centralized platform for their communication campaigns.

Testing: We conducted rigorous testing to ensure the solution was functioning as expected. This included testing the personalized emails, automation processes, and the effectiveness of the centralized data system.

Training and Handover: After the client was satisfied with the solution, we trained their team on how to use Salesforce Marketing Cloud effectively. We ensured they were comfortable with managing campaigns, analyzing results, and making data-driven decisions.

Support and Maintenance: Post-implementation, we continued to provide support and maintenance. We helped the client refine their strategy based on the data-driven insights from their campaigns and assisted them with any technical issues.



Tech Stack Used

The project required the use of sophisticated technology.

Here's the tech stack we employed:

Salesforce Marketing Cloud: This was the core platform we used for creating and managing email campaigns. It provided tools for personalization, automation, and data integration.

Data Integration Tools

- Salesforce Data Manager
- Salesforce Dataloader
- Salesforce APIs

Analytics and Reporting Tools: Salesforce's analytics and reporting tools helped us track performance metrics and understand the effectiveness of the new strategy.

- Salesforce Reports and Dashboards
- Einstein Analytics (Tableau CRM)
- Datorama

The success of this project reaffirms the power of using the right technology to transform business strategies.

Conclusion

At Xylity Technologies, we didn't just assist the client in refining their donor engagement strategy—we completely transformed it. Leveraging personalized content and data-driven insights, the client experienced enhanced revenue growth and fostered more robust relationships with their donors.

Are you looking to revolutionize your donor engagement strategy? Connect with Xylity Technologies today. Let us collaborate to achieve your objectives with a custom solution tailored specifically for your needs.

