



Optimizing SFMC for a Healthcare Technology Company



Tech stack we used



marketing cloud

About

Client: Healthcare Technology Company

Industry: Healthcare Technology

Engagement Duration: Ongoing

Services Delivered

Salesforce Marketing Cloud

Data Architecture

SMS Journey Mapping

Engagement Tracking

Background

A healthcare technology company specializing in modernizing the financial aspects of the healthcare system came to us with a pressing challenge. Their platform, designed to streamline pricing, payments, and healthcare claims, was growing rapidly. However, their marketing efforts were hindered by siloed data, limited segmentation, and poor visibility into the effectiveness of their campaigns, especially those utilizing Salesforce Marketing Cloud (SFMC). Their email and SMS campaigns lacked cohesion, and engagement data from various touchpoints was scattered, preventing meaningful analysis and optimization.

Approach

We kicked off by consolidating their Salesforce CRM data and SFMC system data views into a unified Master Data Extension (Master DE), a central repository that would power advanced segmentation, personalized messaging, and effective campaign execution.

1. Data Integration & Master Audience Architecture

The first step was bringing together critical data from Salesforce and SFMC into a cohesive structure:

- **Salesforce Data Extensions:** We synchronized key data objects such as Contact, Account, and Preference Center to capture all relevant customer information. Additionally, we incorporated metadata from LiveChat interactions to provide insights into customer behaviors and potential triggers for engagement.
- **SFMC System Data Views:** We pulled engagement data from SFMC system views like Sent, Open, Click, and Job to understand how users were interacting with campaigns and refine our segmentation strategy.

2. SQL Automation Strategy

Next, we focused on automating data extraction and transformation using SQL in Automation Studio:

- **Raw Activity Logs:** We queried SFMC's system data views for raw activity data—Sent, Open, Click, and Job—ensuring we had a full view of email interactions for accurate engagement scoring and segmentation.
- **Data Aggregation:** We aggregated engagement data per subscriber into a single record, simplifying downstream analysis and ensuring that we could segment contacts based on their unique behavior.
- **Enrichment with LiveChat Data:** We brought in LiveChat transcript data to ensure customer service interactions were factored into the Master DE, further enriching segmentation criteria.

3. SMS Journey Mapping & Consent Management

We implemented a two-step SMS process to ensure compliance and maximize engagement:

- **Single & Double Opt-In Process:** We created a seamless opt-in flow, starting with single opt-in and progressing to double opt-in for compliance. Those who completed double opt-in were stored in a dedicated Data Extension for SMS campaigns.
- **SMS Metrics Tracking:** We set up custom AMPscript to capture click data for SMS campaigns, ensuring that SFMC system data views limitations were overcome, and providing a more complete picture of SMS campaign performance.

4. Data Synchronization & Reporting

To close the loop, we synced all enriched data back into Salesforce, creating a reliable system for reporting and attribution:

- **Custom Salesforce Objects:** Using Journey Builder, we pushed SMS metrics and engagement data into a custom Salesforce object, ensuring each interaction was accurately tracked.
- **Comprehensive Reporting:** This integration allowed for robust reporting on both email and SMS campaigns, improving the ability to measure performance and optimize campaigns in real time.

Results (In Progress)

1. Centralized Data Hub

The Master DE became the cornerstone of the marketing operation, providing a unified view of each contact's engagement across email, SMS, and support interactions.

2. Advanced Segmentation

By combining behavioral, preference, and lifecycle data, the company was able to create highly targeted campaigns that resonated with their audience.

3. Improved SMS Engagement

The optimized opt-in process and comprehensive SMS metrics tracking led to higher engagement and more effective SMS campaigns.

4. Efficient Campaign Execution

Automation significantly reduced manual work, enabling faster, more flexible campaign execution while maintaining accurate data tracking.

Conclusion

The integration of Salesforce CRM data with SFMC, combined with a streamlined SMS journey and advanced segmentation strategy, transformed the healthcare technology company's marketing efforts. With a unified data architecture, they now have the tools to run personalized, high-impact campaigns across email and SMS, backed by reliable reporting and engagement insights. The result is a more effective, data-driven marketing engine that allows them to continue innovating in the healthcare financial space.