



# Bringing Your CRM In-House


*Dan Small – VP, Digital Services - Hartford HealthCare*

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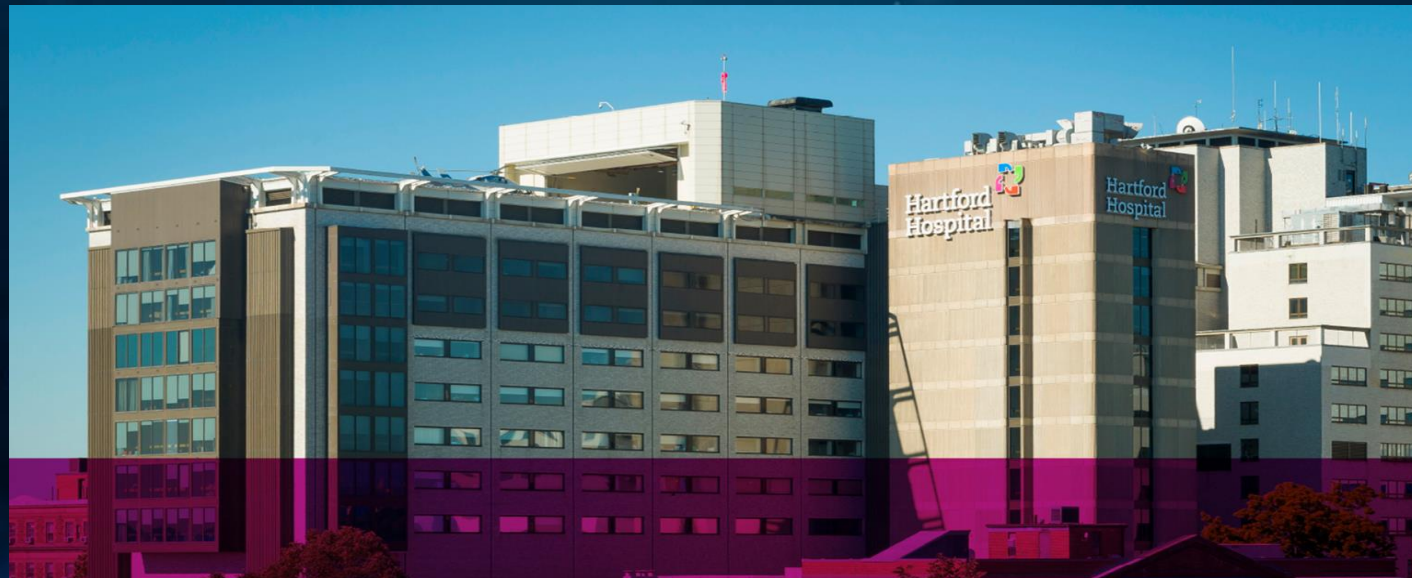


# Agenda: Bringing Your CRM In-House

- Why Implement a New Marketing Tech Stack?
  1. Control Your Own Destiny
  2. Agility & Speed
  3. Data Ownership & Enhanced Intelligence
  4. Core Competency Growth for Organization
  5. Revenue Attribution Reporting Flexibility
- Business Considerations
  1. ROI Reporting
  2. Leadership Advocacy
  3. Budget Management
  4. Resourcing
  5. Compliance Collaboration
  6. IT Alignment & Integration
  7. Contingency Planning
  8. Resources & Support Model
- Implementation
  1. Strategic Partnerships
  2. Project Management
  3. Communication
  4. Flexibility
- Building a Bigger Boat
  1. What did we build?
  2. ROI Dashboard
  3. Data Cloud Segmentation
  4. Activation
  5. Lessons Learned

Hartford HealthCare 

# Our Journey



# Why Implement a New Marketing Tech Stack?

- **Enhanced Control:** Gain greater command over marketing initiatives and spend optimization leading to...
- **Agility, Speed & Scale:** Facilitate faster deployment of campaigns and swift adaptation to market changes.
- **Data Ownership and Intelligence:** Secure proprietary data and insights, integral for strategic decisions.
- **Core Competency Growth:** Foster the development of essential skills and knowledge within the organization and become strategic asset.
- **Revenue Attribution Reporting:** Achieve improved flexibility, accuracy and control in tracking revenue sources. Demonstrate to leadership that marketing can be a strategic investment that drives revenue and growth, rather than simply a cost or expense.

# Business Considerations

- **ROI Reporting:** Utilize return on investment metrics to guide and justify the implementation.
- **Stakeholder Engagement:** Secure buy-in from key stakeholders, ensuring a collaborative approach.
- **Leadership Advocacy:** Garner support from organizational leaders to champion the initiative.
- **Budget Management:** Aim for **operational expense** funding with minimal one-year upfront investment.
- **Compliance Collaboration:** Work closely with compliance teams to ensure adherence to regulations, and prevent delays from lack of necessary planning.
- **IT Alignment & Integration:** Proactively understand your CIO's technology vision and understand IT requirements and intake process to facilitate smooth integration, ensuring alignment and preventing roadblocks and delays.
- **Contingency Planning:** Prepare for potential disruptions to marketing operations, despite efforts to minimize them.
- **Support Model:** What support services do you need in this brave new world. Consider creative ways of securing resources.

# Implementation

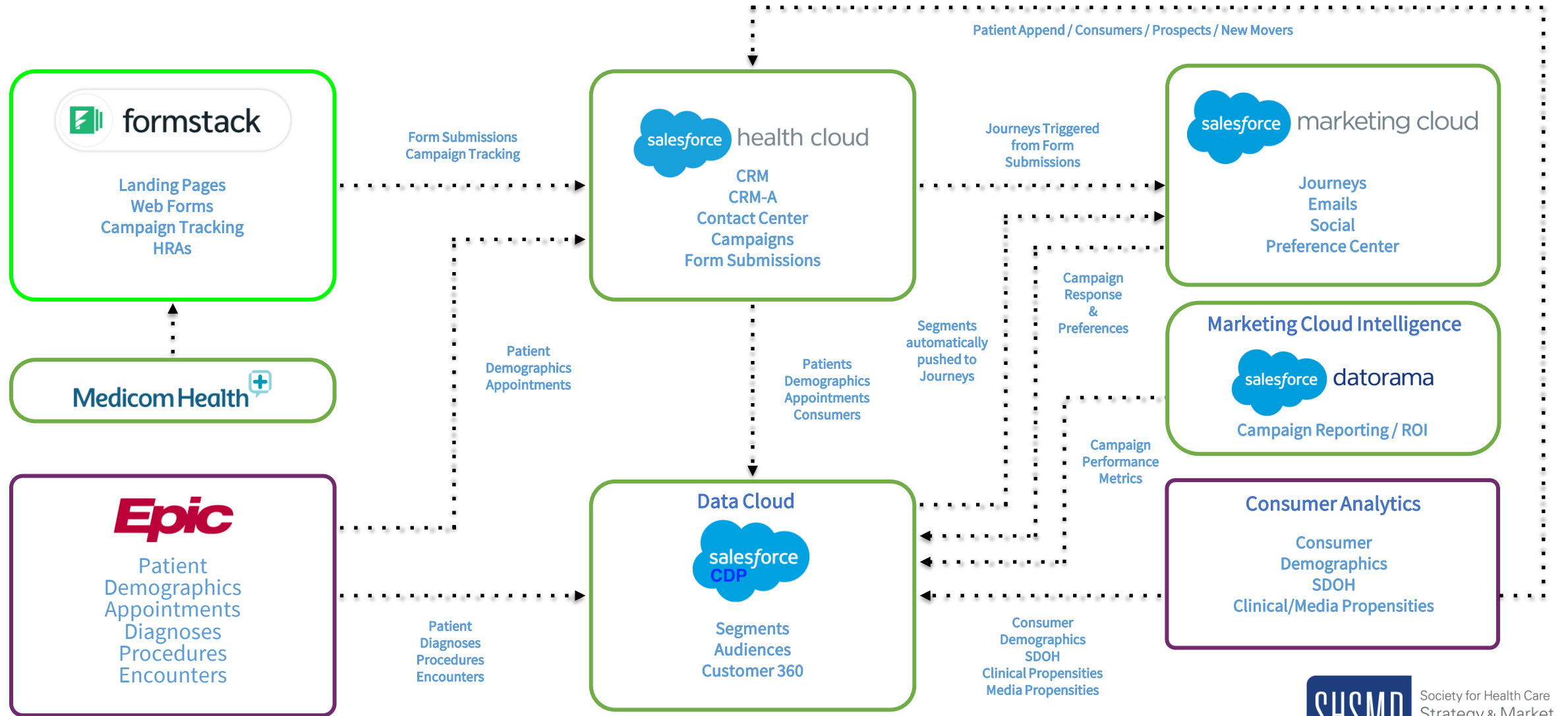
- Strategic implementation partnership: Bringing the right internal and external resources and skill-sets to the table.
  - Systems Design & Architecture, Data Science & Analytics, Salesforce Development & Engineering, Project Management, Legal and Compliance
- Focus on needs and put wants in the parking lot to secure foundational stability. But... design for the future and do not lose sight of the need for more data to foster personalized communications.
- Project management: Be agile and avoid "happy path" waterfalls.
- Constant communication and collaboration between customers and partners, and build trust to ensure problems are quickly addressed.
- Flexible thinking as challenges emerge.





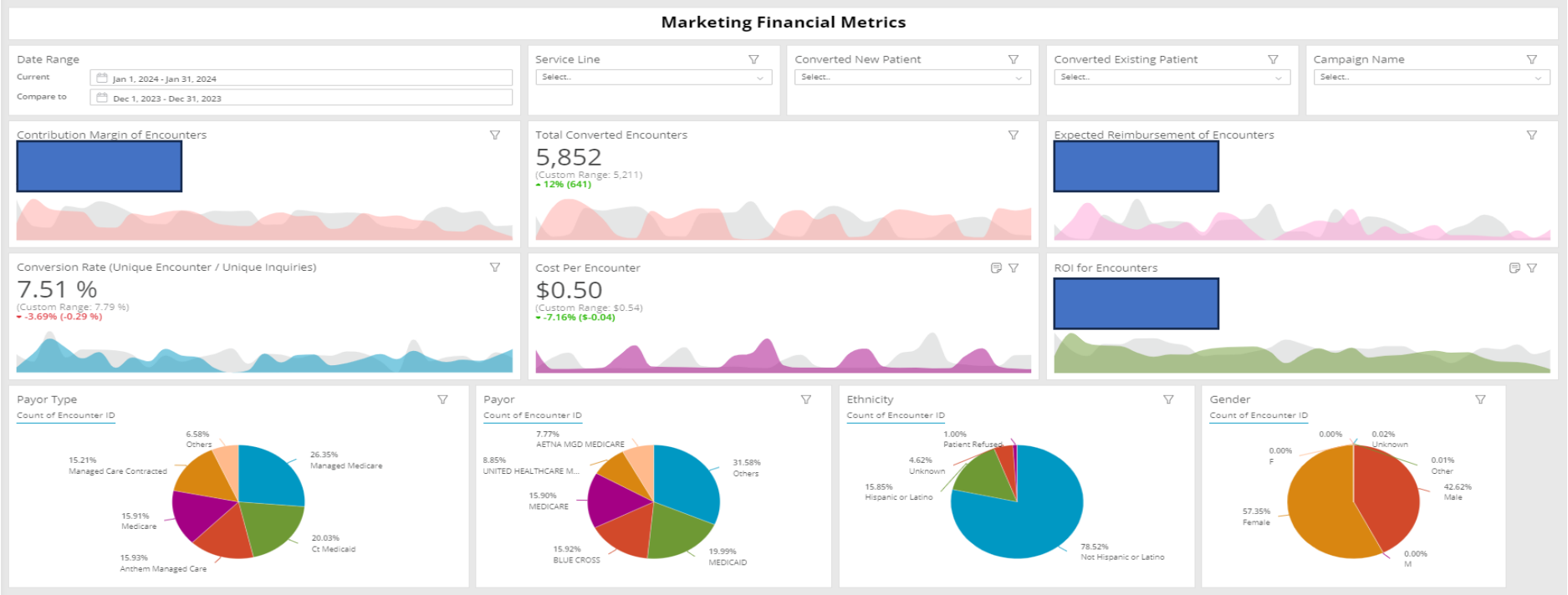
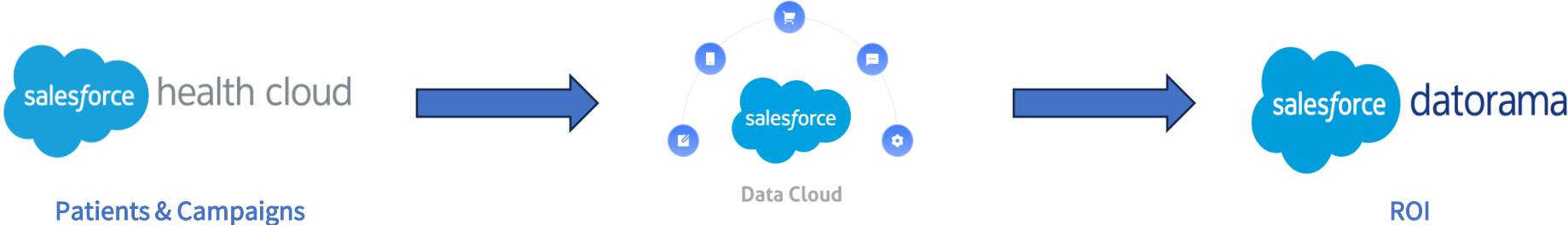
# Building a Bigger Boat

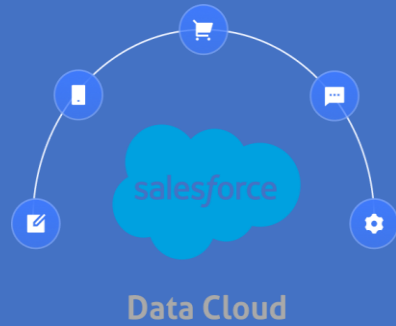
# What did we build?





# ROI Dashboard





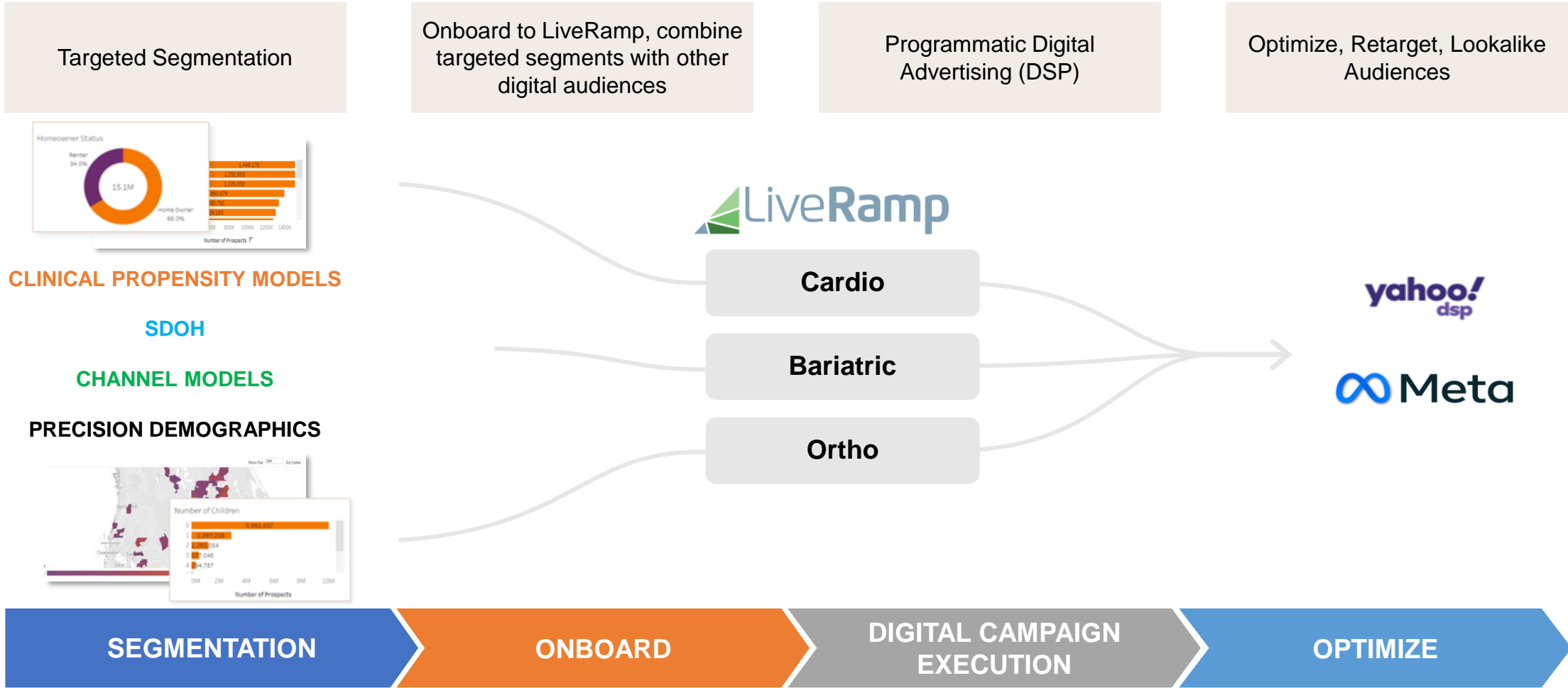
# Segmentation

Building your Salesforce Data Cloud Data Model for Segmentation

- Identity Resolution
- Clinical Data
- Consumer SDOH & Propensities
- Payer
- Rx



# HIPAA Compliant Data-Driven Precision Targeting & Activation



# Lessons Learned

- **Focus on your use cases**

- Campaign Attribution & Reporting
- Lead Capture & Nurturing Journeys
- Build flexibility where appropriate (Salesforce is excellent for this)
- Targeting & Segmentation: Know your attributes

- **Pick the right tool for the job**

- Data Cloud has the power to handle your Encounters, Appointments, etc.
  - Know your licensing model
  - Data Cloud is a great tool for building ROI Reporting Segments
  - Data Cloud has more sophisticated matching logic
- CRM Analytics – Dashboards & Complex Calculations

- **Know Your Data**

- CPT/ICD, Values, Fill Rates
- Data Hygiene

- **Don't Forget or Underestimate**

- Data Ingestion / Integration / Migration / Refresh / Matching
- ROI Reporting

- **Resourcing**

- Forms, Landing Pages, Reporting, Administration, Data Integration

- **Experience Matters**

- Mobile First

- **Error Handling & Administration**

- Form Submissions Failures
- Redundant Storage
- Duplicates



# Questions?



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VP, Digital Services  
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# Bio - Dan Small



Daniel Small  
VP, Digital Services  
Hartford HealthCare

## Vice President of Digital Services Hartford HealthCare

Dan Small, a seasoned digital strategist with over 20 years of experience in the healthcare industry, is a driving force behind Hartford HealthCare's digital transformation. As the newly appointed Vice President of Digital Services, Dan is spearheading the execution of a comprehensive digital strategy focused on putting "HHC in the hands of our patients." His commitment to personalized, coordinated care and on-demand access is evident in his oversight of key digital assets like MyChart, Patient Engagement technologies, HHC websites, HHC Intranet, and other vital digital platforms.

Prior to his promotion, Dan served as the Senior Director of Digital Strategy at Hartford HealthCare, where he consistently demonstrated a knack for leveraging technology and design to enhance patient experience. He has a proven track record of success in managing various digital initiatives, including CRM, website development, digital marketing, intranet communications, online reputation management, the marketing call center, and digital signage programs. His leadership has positioned Hartford HealthCare as a digital leader in healthcare.

# Brian O'Connor



**Brian O'Connor**  
VP, Consumer Analytics  
Populi / Definitive Healthcare

Brian O'Connor leads Consumer Analytics Strategy and Campaign Activation Services at Definitive Healthcare. Brian joined Definitive Healthcare (Formerly Populi, Inc.) in April 2022 from Mercury Healthcare (Now Web/MD), where he was Senior Vice President of Enterprise Technology.

At Mercury Healthcare, Brian focused on CRM & Marketing Enablement, and designed the lead capture ecosystem for all of Mercury Healthcare's products. As a primary SME on the CRM Platform, Brian focused on client marketing systems integration.

Brian brings over 20 years of experience with enterprise healthcare systems, with expertise across CRM, Marketing Automation, CMS, DMP, CDP and Cloud Infrastructure. Brian served as Chief Technology Officer for two previous technology consulting companies, focused on Digital Transformation and Scaled Agile Delivery across several verticals.