

## CLASS SYLLABUS:

Watch here!



### July 7: Patient Acquisition Part #1

This session explores how health systems can leverage Epic-native tools to drive patient acquisition and improve access. We'll focus on practical strategies using MyChart and Hello World to increase engagement, reduce friction, and convert patients more effectively.



### July 21: Aligning Marketing & IT For Epic Success

Marketing and IT alignment is one of the biggest barriers to unlocking Epic's full potential. This session breaks down why the disconnect exists, how it impacts growth, and what a high-functioning partnership looks like in practice.



### July 14: Patient Acquisition Part #2

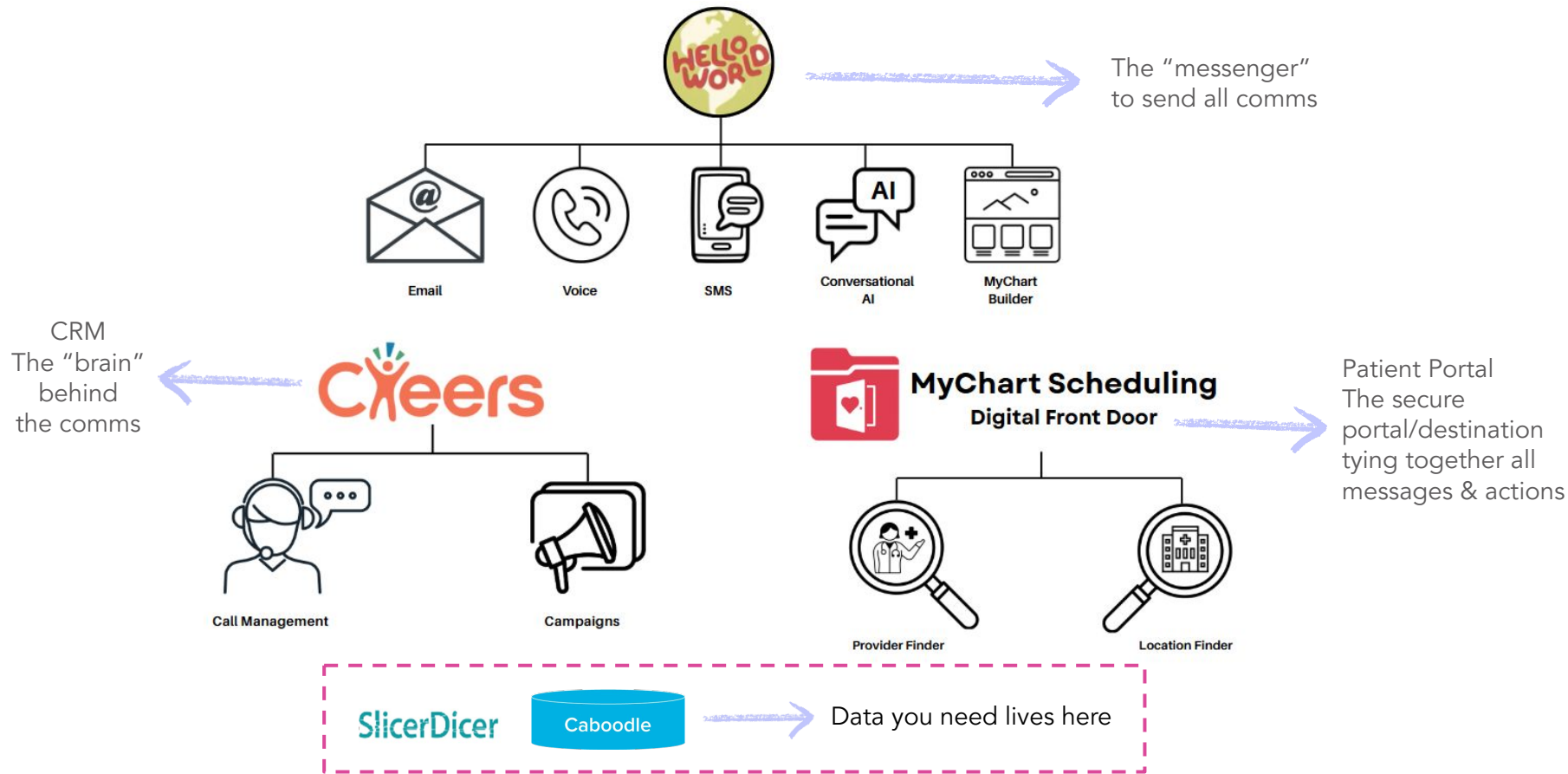
This session dives deeper into CRM and campaign execution within Epic. We'll explore how Cheers, campaign tools, and audience segmentation can be used to build scalable growth strategies and where external platforms may still be necessary.



### July 28: Analytics and reporting — Start Growing

Most organizations are rich in reports but poor in insights. This session focuses on how to turn Epic data into actionable growth strategies, measure true ROI, and connect marketing efforts to patient outcomes.

# EPIC'S MARKETING ECOSYSTEM



# IF WE'RE TALKING MEASUREMENT, THEN WE SHOULD BE TALKING....



## HIPAA & COMPLIANCE

*We gotta follow the rules*



## PRIVACY VS. PERSONALIZATION

*We can't get weird*



## DEFINING CONVERSIONS

*Let's measure what matters*



## GOVERNANCE & GATEKEEPERS

*We need friends*

# WHERE YOUR DATA LIVES IN EPIC

*Marketers need to understand this to know when and how they can see their results.*

## CHRONICLES (REAL-TIME)

This is the live transactional database. It runs Reporting Workbench.

### Marketing impact:

Great for immediate operational needs (e.g., "Did our campaign today spike MyChart activations right now?"), but running massive historical marketing queries here will slow down the hospital's system.

## CLARITY (DAILY EXTRACT)

A relational database (SQL) updated nightly.

### Marketing impact:

This is where deep campaign analysis happens. If a marketer wants to see appointments booked yesterday from a specific LinkSource ID, they have to wait for the Clarity extract.

## CABOODLE (DATA WAREHOUSE)

Runs sequentially with Clarity ETL nightly. Combines Epic data with standard tables for non-Epic data (like CRM data, financial systems, or costing data).

### Marketing impact:

Essential for true ROI and downstream revenue tracking. This is where the data lives that helps you calculate the total value of a patient acquired via marketing over 12 months.



# EPIC TOOLS & VOCABULARY (THE MARKETER'S CHEAT SHEET)



## ANALYTICS CATALOG

The search engine for *existing* reports. Marketers should search here before submitting a ticket to IT for a custom report.



## DASHBOARDS (RADAR)

At-a-glance view of defined KPIs. Marketers should build a "Marketing Growth & Access Dashboard" that executives can view daily. Can click to dig into Reporting Workbench or SlicerDicer for analysis.



## SLICERDICER

Epic's self-service population data exploration tool.  
*WARNING: SlicerDicer Sidekick (conversational AI) has a cost.*



### Marketing impact:

Crucial for market segmentation. Use it to find patient cohorts ("Show me patients over 50 in ZIP code 12345 who haven't had a screening colonoscopy") without needing an SQL developer. Can be setup for a user to analyze aggregate data but not see line level data.



## REPORTING WORKBENCH

Generates specific, granular, line-level reports (run against Chronicles).



### Marketing impact:

Generating lists of specific patients who need outreach or tracking real-time failures in a campaign flow.



# DEFINING A CONVERSION IN HEALTHCARE

## HIERARCHY OF HEALTHCARE CONVERSIONS



## KEY DASHBOARDS



### ACCESS METRICS

(days to appointment,  
fill rates)



### CAMPAIGN PERFORMANCE

(open, click, apt  
scheduled, apt  
completed, revenue)



### SERVICE LINE GROWTH TRENDS



### PROVIDER UTILIZATION



# COMMON BLIND SPOTS



## LACK OF VISIBILITY INTO PATIENT JOURNEY

(Unless you use the Session Analytics tool)



## NO ATTRIBUTION BEYOND LAST TOUCH



## DISCONNECT BETWEEN MARKETING AND OPERATIONAL DATA



# TURNING REPORTS INTO INSIGHTS



## ASKING THE RIGHT QUESTIONS:

- What is driving growth?
- Where are we losing patients?



## ASKING EPIC CORRECTLY

- Use correct terminology when possible and coordinate with your IT besties



## IDENTIFYING ACTIONABLE OPPORTUNITIES

(e.g., underutilized providers)



# TECHNICAL DETAILS

TECHNICAL SPECIFICATIONS, INTEGRATIONS,  
AND SETUP DETAILS



# CONNECTING EPIC DATA TO MARKETING KPIS

## EPIC LINKSOURCE & NATIVE UTM PASSING

Native features like [LinkSource](#) and [MyChart Builder's UTM parameter integration](#) function allow that when a user clicks a paid Facebook or Google Ad with attached UTM tracking tags ([utm\\_source=google&utm\\_campaign=heart\\_month](#)), Epic's open scheduling architecture can capture those specific text strings during the guest booking sequence. (Can also work with deep linking with Direct booking)

## WRITING UTMS TO THE PATIENT RECORD

Then, the incoming tracking metadata is carried through the browser frame and stamped directly onto the newly created appointment record or patient file.

## PULLING THE LOOP CLOSED

Because that specific UTM is permanently bound to the encounter entry, a SQL query run in Caboodle can easily pull a report stating: "Show me the total billing charges generated over the last 90 days from encounters containing the UTM campaign parameter [heart\\_month](#)." That is true, unassailable closed-loop ROI.

**BUT WAIT! H&H'S UTM CONNECT TOOL  
MAKES IT EVEN BETTER.**