

BUILDING A DASHBOARD - TYING IT ALL TOGETHER

The data cannot stay in Chronicles; it has to move through Epic's architecture to be useful for complex reporting.

PHASE 3 Data Journey

1. **The Clarity ETL:** The data is processed via the standard nightly ETL (Extract, Transform, Load) process from Chronicles to Clarity.
2. **Clarity Data Placement:** The UTM campaign IDs now reside in relational SQL tables (like PATIENT, APPOINTMENT_DATA, and potential campaign-specific tables).
3. **SlicerDicer:** While the data is moving to Clarity, marketers can immediately use SlicerDicer (within Epic) to query cohorts based on this incoming UTM data for operational purposes.
4. **Caboodle ETL:** The standardized data is further transformed and loaded from Clarity into Caboodle (Epic's Enterprise Data Warehouse). This is crucial for true ROI as it combines clinical data with financial and operational data.

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We are preparing the final, clean, and joined data for external reporting.

PHASE 4 Data Consolidation & Export

1. **The Defined Data Export:** This isn't a standard export of all UTMs; it is a specific, joined SQL Query that extracts a clean table from Caboodle, linking:
 - a. Patient ID (Primary Key)
 - b. Appointment Date/Time
 - c. Appointment Status (Kept, Canceled)
 - d. UTM Campaign ID
 - e. Downstream Revenue (e.g., specific procedures or office visits linked to that initial campaign)
2. **HIPAA & Data Governance Filter:** Before leaving the system, this export must pass through a strict HIPAA/PHI filter to ensure only permissible, de-identified, or restricted data is sent externally, based on organizational policy.
3. **The Data Lake:** The consolidated, permissible dataset is landed here.

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The data has exited Epic and enters the final analysis phase.

PHASE 5 Analytics & Insights Loop

1. **Data Visualization Tool:** e.g., Tableau, Power BI, Google Looker
2. **Data Refresh & Joining:** The visualization tool pulls the unified data from the Data Lake and often re-joins it with external cost data (e.g., the actual ad spend from Google Ads) to enable true cost per acquisition (CPA) reporting.
3. **The Actionable Insight:** The dashboard shows marketing ROI, patient leakage, and downstream revenue by campaign, enabling the shift from descriptive metrics (clicks) to prescriptive strategies (how to re-allocate budget).

3 PERSONAS & DATA EXAMPLES

THE SPECIALIST'S QUESTION

"How did my specific digital campaign perform this month?"

(Focus on: LinkSource -UTM Connect, Campaign Performance Dashboards, Reporting Workbench)

THE SERVICE LINE DIRECTOR'S QUESTION

"Are we actually growing the business and filling clinics?"

(Focus on: LinkSource -UTM Connect, SlicerDicer, Access Metrics, Provider Utilization, Operations Alignment)

THE CFO'S QUESTION

"What did I get for the \$500k marketing budget I gave you?"

(Focus on: LinkSource -UTM Connect, Caboodle, Downstream Revenue, Contribution Margin, True ROI)

CASE STUDIES - LET'S MAKE IT REAL!



BOTH NEEDED TRUE ROI REPORTING TO MAKE INFORMED MARKETING AND BUSINESS DECISIONS.

AN ESTABLISHED EAST COAST HEALTH SYSTEM

was running campaigns across multiple service lines with no way to link them to booked appointments.

A NEWLY EXPANDING DENTAL CLINIC

had no marketing performance history to build on.

CASE STUDIES - LET'S MAKE IT REAL!

East Coast Health System



Appointments are now attributed across seven service-line campaigns, including Oncology and Neurosurgery, giving the team full-funnel data to defend its media spend.

For our health system client, UTM Connect integrated seamlessly into their H&H paid media dashboard, delivering insights the team had never had: media cost per appointment booked, accurate conversion rate reporting, impressions, and appointments by campaign.

As their goals evolved from awareness to acquisition, H&H used UTM Connect data to identify exactly which ads were driving appointment bookings—then we pulled the right levers to maximize their media budget.

445 ONLINE APPOINTMENTS,

Identified by UTM Connect in the first 6 months (39 from patient acquisition campaigns).

COST PER APPOINTMENT

FELL 95%, in 4 months—from \$1,389.86 to \$71.56.

Booking-optimized CAMPAIGNS OUTPERFORMED

awareness-driven ones, prompting a shift to conversion-focused messaging and reallocated budgets.

CASE STUDIES - LET'S MAKE IT REAL!

Fast-Growing Dental Clinic



The value lies in its depth: appointment-level data breaks down performance by tactic, message, audience, and location. This shows which campaigns generate bookings and offers key insights into clinic patients. It also surfaced an insight most new practices miss: new-to-market brands win by pairing digital paid media with grassroots presence—posters, QR codes, neighborhood visibility.

For our dental clinic client, H&H implemented UTM Connect ahead of their expansion and built a custom dashboard to visualize the data, without the need for direct access to their Epic records.

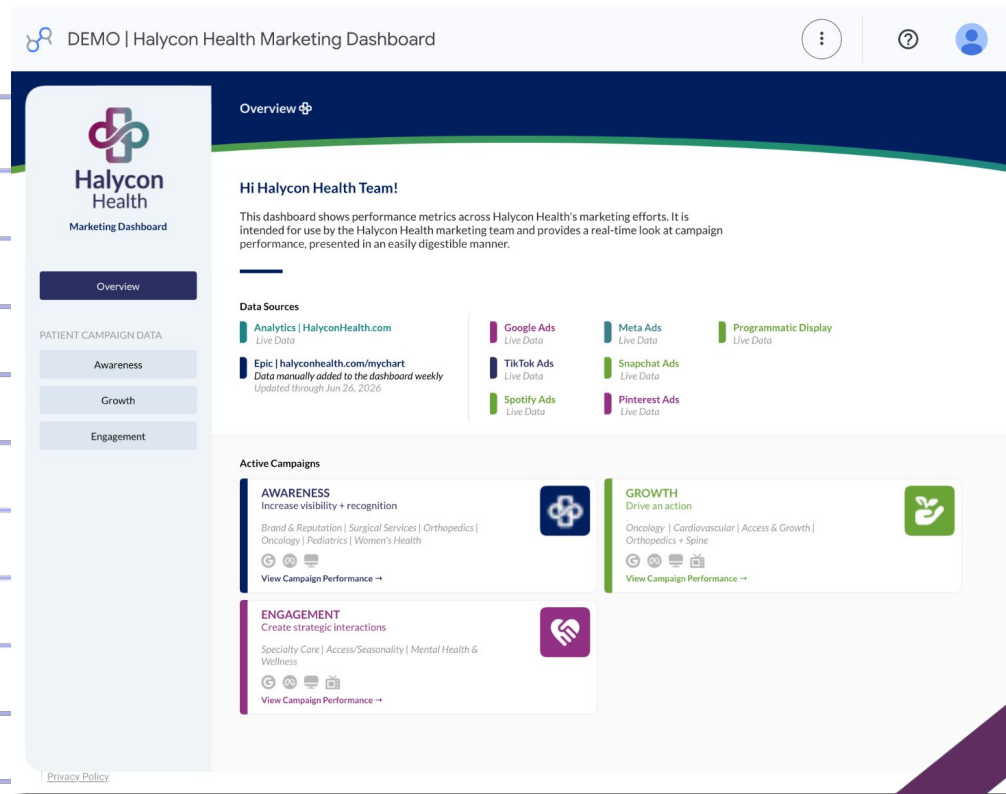
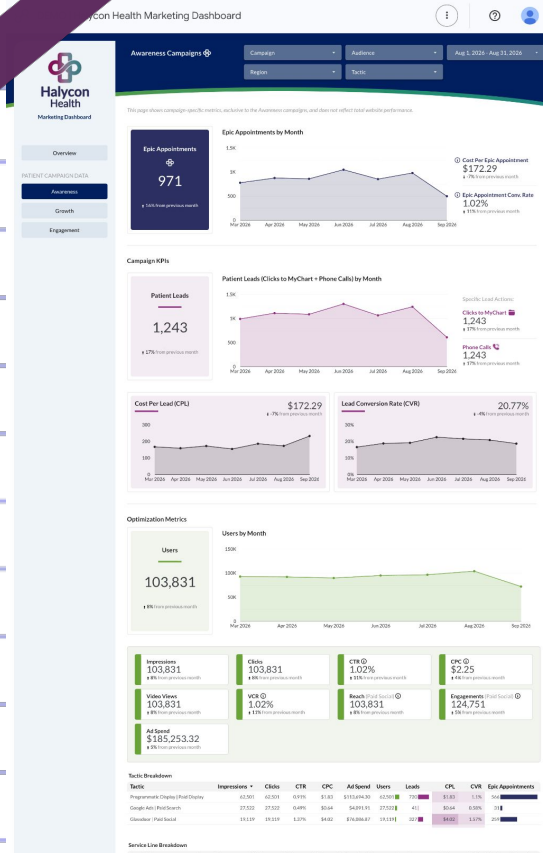
From launch, the team had access to granular attribution data: which ads and keywords were driving bookings, and whether the services booked aligned with the campaigns that brought them in.

That clarity let H&H optimize the channel mix from day one.

9,658 EPIC APPOINTMENTS, Identified by UTM Connect in the first 8 months (224 from the brand launch campaign).

COST PER APPOINTMENT FELL 88%, from \$4,171.67 at launch to \$505.17 in June.

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SESSION WRAP: HOMEWORK

Talk to IT! Starter Qs...

Qs for your IT BFF:

- How can I get access to our reporting tools?
- Do we have Session Analytics?
- Can I access SlicerDicer?

Request access to these dashboards:

- Licensed for Campaigns
 - Campaigns Overview Dashboard
 - Campaign Summary Dashboard
 - Campaign Details Dashboard
- Licensed for Hello World (by channel)
 - SMS Usage Overview Dashboard
 - Email Usage Overview Dashboard
 - Voice Call Usage Overview Dashboard
- Using Provider Finder
 - MyChart Provider Finder Overview Dashboard
 - MyChart Provider Finder Session Analytics Dashboard (requires MyChart Session Analytics to also be enabled)
- Using MyChart Builder
 - Microsite Summary Dashboard
 - Microsite Session Analytics Dashboard (requires MyChart Session Analytics to also be enabled)
- General dashboards
 - Outpatient Specialty Supply and Demand Dashboard
 - Patient Experience Dashboard

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.

WE ARE.
MARKETING
HAPPY.

