

SHSMD26
CONNECTIONS
Health Care Marketing, Strategy & Communications

American Hospital Association Conference
September 27-29 ∙ Baltimore

From Access to Action: Turning Epic into a Growth Engine for Healthcare Marketing

- Jenny Bristow, CEO at Hedy & Hopp
- Sarah Cutcliffe, Director of Epic Services at Hedy & Hopp





Jenny Bristow

CEO at Hedy & Hopp

Hedy & Hopp is a full-service, fully healthcare marketing agency that works with health systems, multi-location providers, and payors across the US.

Prior to starting H&H 11 years ago, Jenny launched, grew, and sold a digital marketing agency in Seattle and worked at Amazon.

H&H was named a finalist for MM+M's 2025 Small Agency of the Year Award, and Jenny was personally named a finalist for MM+M Agency Entrepreneur of the Year. H&H made the Inc 5000 (Fastest Growing Companies in the US) in 2019, 2025, and 2026.

She loves teaching others about the more technical aspects of healthcare marketing, making it easy to understand and fun!

(Jenny is also the host of this podcast!)



Sarah Cutcliffe

Director of Epic Services



Sarah started her healthcare career as a trainer for Epic and has accidentally molded a vocation from the foundational role. She has over 15 years of Epic implementation and optimization experience, giving her deep knowledge of integration and functionality. As she has grown in her expertise, she has kept the patient experience at the center of her mission.

Off the clock, Sarah spends time with her husband and kiddos, lifts weights, and gabs incessantly with loved ones.

Sarah is delighted to support healthcare systems better leverage Epic as a marketing tool in her role at H&H.



SARAH CUTCLIFFE
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What will we cover?

Learning Objectives:

- Understand the core Epic tools available to marketing teams and how they support engagement and measurement
- Learn how to connect marketing campaigns directly to appointments, completed visits, and service-line growth
- Explore real-world case studies demonstrating marketing–IT collaboration in action
- Identify common implementation challenges and how to navigate them.

DISCLAIMER:

THIS WORKSHOP IS MEANT TO GIVE YOU THE VOCABULARY AND FOUNDATIONAL KNOWLEDGE TO HAVE MEANINGFUL CONVERSATIONS WITH YOUR IT TEAM ABOUT EPIC, NOT TO REPLACE EPIC'S TRAINING OR MAKE YOU A TECHNICAL EXPERT. IT IS NOT SPONSORED OR ENDORSED BY EPIC.



LET'S GET STARTED.

WHY IS HEDY & HOPP TALKING ABOUT EPIC?



Four H&H team members on campus at Epic while completing MyChart certification in 2025.

H&H is the first ever marketing agency to send team members to get certified in their tools. But we're not special! *Jenny's just a bulldog.*

Let's talk about what we learned and the opportunities we see for healthcare marketers!

WE ARE EXCITED ABOUT

HOW EPIC CAN HELP

MARKETERS BECAUSE

**YOU WATCHED OUR SUMMER SCHOOL
WEBINAR SERIES, RIGHT?**



Compliance is covered.



Epic already has all of your data.



You don't have to convince your organization to buy another tool.



Some functionality you already have access to or can easily add.



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

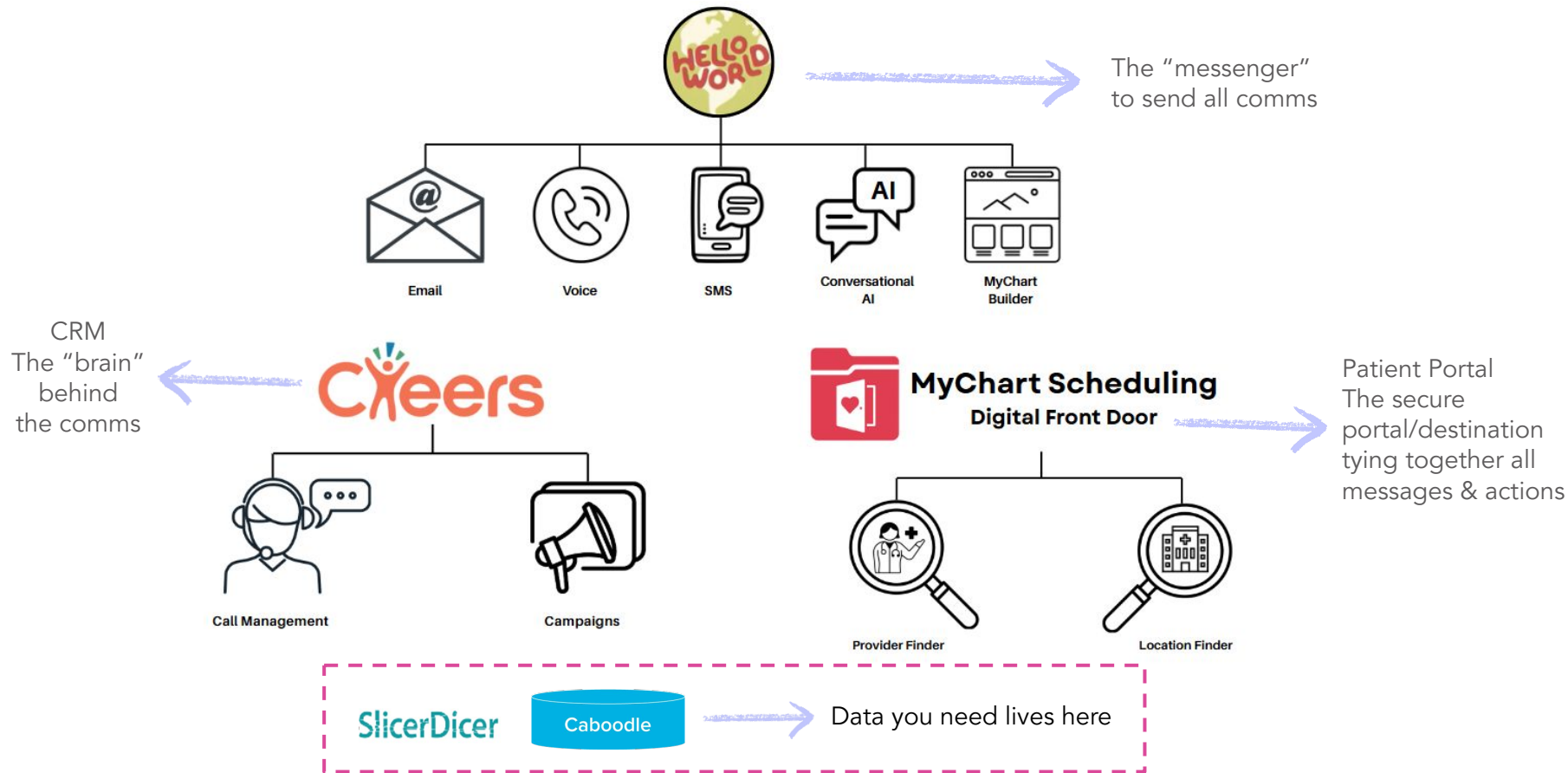
This session dives deeper into CRM and campaign execution within Epic. We'll explore how Cheers, campaign tools, and audience segmentation can be used to build scalable growth strategies and where external platforms may still be necessary.



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.**



SO, HOW DOES H&H'S UTM CONNECT WORK?



UTM CONNECT

UTM Connect is a tool that:

- Reads and captures UTM parameters
- Ensures those values persist across the user's website journey
- And finally get appended to links driving into scheduling or lead capture within Epic

Your team will provide our team access to your CMS and website analytics tools and we will work directly with either your internal Epic implementation team or your Epic TS to conduct QA.

WHAT ARE WE TALKING ABOUT?

UTM parameters are a standard way that businesses and marketing teams attribute outcomes to marketing tactics.

[https://hedyandhopp.com/?utm_campaign="Lead_Gen"&utm_medium="email"&utm_source="hubspot"&utm_content="utm_connect_announcement"](https://hedyandhopp.com/?utm_campaign=)

[https://hedyandhopp.com/?utm_campaign="Lead_Gen"&utm_medium="email"&utm_source="hubspot"&utm_content="utm_connect_announcement"](https://hedyandhopp.com/?utm_campaign=)

HEDY & HOPP

Who We Are ▾

Who We Serve

Our Expertise ▾

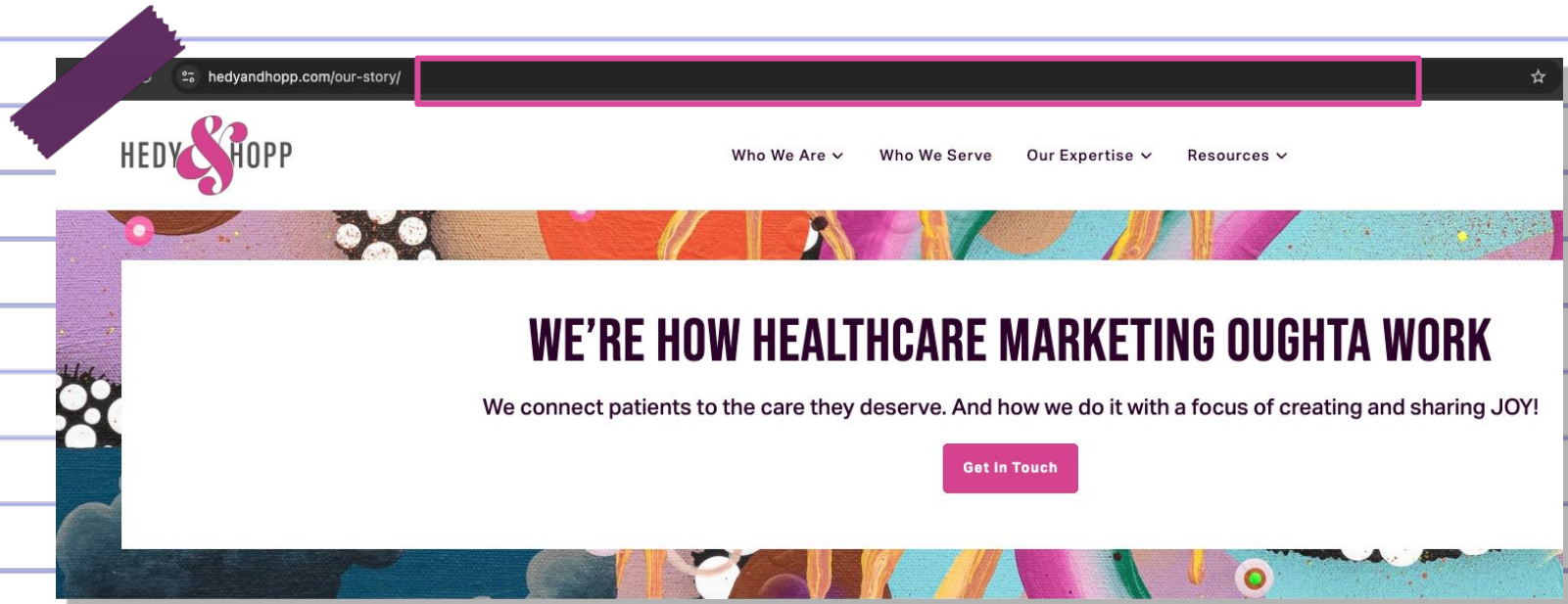
Resources ▾

A FULL-SERVICE, FULLY HEALTHCARE MARKETING AGENCY.

As an independent, women-owned agency, we help healthcare clients build brands and exceed their goals with high-performing, HIPAA-compliant marketing strategies—delivering results and joy.

WHAT ARE WE TRYING TO FIX?

Unfortunately, these parameters are designed to be picked up by a web analytics software that's present on every page like Google GA4 or Adobe Analytics. If a user navigates around the site (jumping from MyChart Builder page to your main site, for example) the UTM parameters are lost. But not with UTM Connect!



SO HOW DOES THIS WORK?

Our UTM Connect product captures those UTM parameters when the user hits the website and saves them even if the user goes to another page.

```
utm_campaign="Lead_Gen"  
utm_medium="email"  
utm_source="hubspot"  
utm_content="utm_connect_announcement"
```

The diagram illustrates the flow of UTM parameters. A box on the left contains four UTM parameters: utm_campaign="Lead_Gen", utm_medium="email", utm_source="hubspot", and utm_content="utm_connect_announcement". Two arrows point from this box to a database cylinder icon on the right. A single arrow then points from the database cylinder to a URL "MyChart/openscheduling" located in a dark bar at the bottom of the slide.



MyChart/openscheduling

Then once that user gets to the desired action, say clicking on a link to Open Scheduling, UTM Connect will take those parameters and add them back to those URLs so they are available to MyChart when the page loads. We do not modify or need access to your Epic instance.

FAQS

Here are the top three questions we receive for UTM Connect:

01 WHAT PHI/PII IS SHARED?

None. The tool only holds UTM parameter within the user's browser. We recommend using parameter values that are non descriptive, such as "AB124" instead of "Mammography campaign." This will provide an additional layer of data obscurity.

02 IS PATIENT ACTIVITY WITHIN MYCHART TRACKED?

No. The tool holds the UTM parameters in the browser and attaches it to the links users use to access Open Scheduling. Epic then adds that information to the patient record, using its normal data flow process. It does not continue tracking the user's actions within MyChart or share any information back from Epic to the browser.

03 DOES H&H SEE THE UTM DATA?

No. H&H will setup the tool but there is no ongoing monitoring or agreement for the tool usage. The UTM parameters persist only in the user's own browser and it is not shared with H&H or any other third party.



MEASUREMENT ISN'T ALWAYS EASY

3 key Attribution Challenges



EPIC LIMITATIONS VS. EXTERNAL TOOLS



MULTI-TOUCH JOURNEYS



OFFLINE + ONLINE DISCONNECT



MEASURING ROI



**SERVICE LINE CAMPAIGN SUCCESS
CONSIDERATIONS**



**COST PER ACQUISITION (CPA) AND
RETURN ON AD SPEND (ROAS)**

BRIDGING MARKETING + OPERATIONS DATA

LINKING SCHEDULING DATA WITH CAMPAIGN DATA

IDENTIFYING BOTTLENECKS
(availability vs. demand) -
throttling based on access

ALIGNING GROWTH STRATEGY WITH OPERATIONAL CAPACITY

THE MARKETING TRAP

Driving 1,000 leads to a Bariatric Surgery campaign when the next available appointment is 6 months out. This wastes budget and frustrates patients.

USING EPIC ACCESS METRICS

Marketers must look at "Next Available Appointment" or fill rates before launching campaigns.

OPERATIONAL ALIGNMENT

Build an automated workflow where if a service line's utilization drops below 75%, a digital campaign automatically triggers; if it goes above 95%, the campaign is throttled or paused.



TRACKING PATIENT JOURNEYS END-TO-END (UTM CONNECT)

FULL FUNNEL



THE UTM PARAMETER IS ADDED TO THE PATIENT RECORD, ALLOWING FOR FULL JOURNEY TRACKING



TRACKING DOWNSTREAM REVENUE (PROCEDURES, FOLLOW-UPS) AND CONTRIBUTION MARGIN



“LEAKAGE” METRIC

Tracking if patients acquired through marketing are staying in-network for their downstream care (e.g., did the primary care campaign lead to an in-network cardiology referral, or did they leak to a competitor?).

BUILDING A DASHBOARD - TYING IT ALL TOGETHER

How does Epic "see" the technical identifier to tie ROI?

PHASE 1 Patient Journey

1. **The Campaign:** Integrated marketing campaign (e.g., Google Ad for "Mammogram in Seattle").
2. **The Traffic:** The URL includes specific UTM parameters (e.g., `utm_campaign=sea_mam_2024` and `utm_source=google`).
3. **The Click:** Patient clicks the ad and lands on the health system's landing page.
4. **The Handshake:** Epic's LinkSource (or H&H UTM Connect) or Cheers (CRM) must be active on the landing page to capture the inbound URL parameters. This technology binds the specific `utm_campaign` ID to a unique Epic Web Session ID.

BUILDING A DASHBOARD - TYING IT ALL TOGETHER

How is anonymous data tied to a real patient record?

PHASE 2 Inbound Data Capture

1. **Patient Scheduling:** The patient uses an integrated Open Scheduling (e.g., MyChart) workflow on the landing page to book an appointment.
2. **Patient Identification & Binding:**
 - a. **New Patient:** If a new record is created, the Epic Web Session ID (containing the UTM) is written directly into a new Patient-Level Data Field (e.g., PAT_ID) in Chronicles.
 - b. **Existing Patient:** If they log into MyChart, the session ID is matched to their existing PAT_ID.
3. **Data Placement in Chronicles:** The UTM data is now stored in Chronicles (Epic's real-time transactional database). It is directly linked to the Patient ID (PAT_ID), the Appointment ID (CSN), and potentially a specific Campaign ID.

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.

BUILDING A DASHBOARD - TYING IT ALL TOGETHER

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.

BUILDING A DASHBOARD - TYING IT ALL TOGETHER

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.

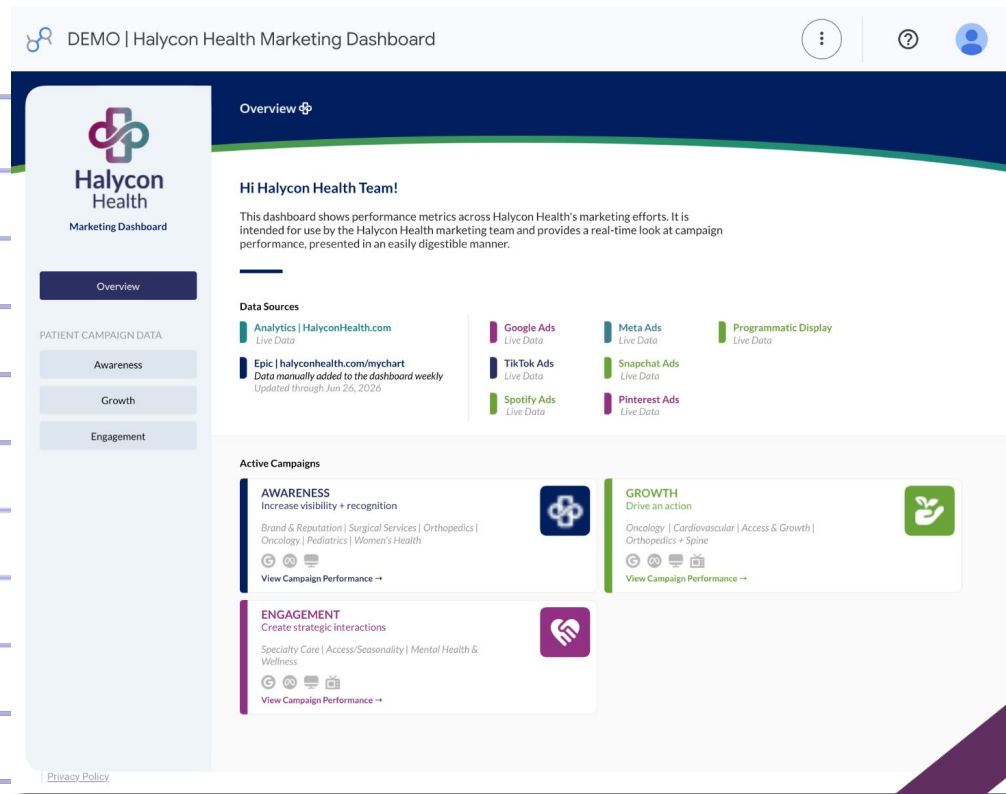
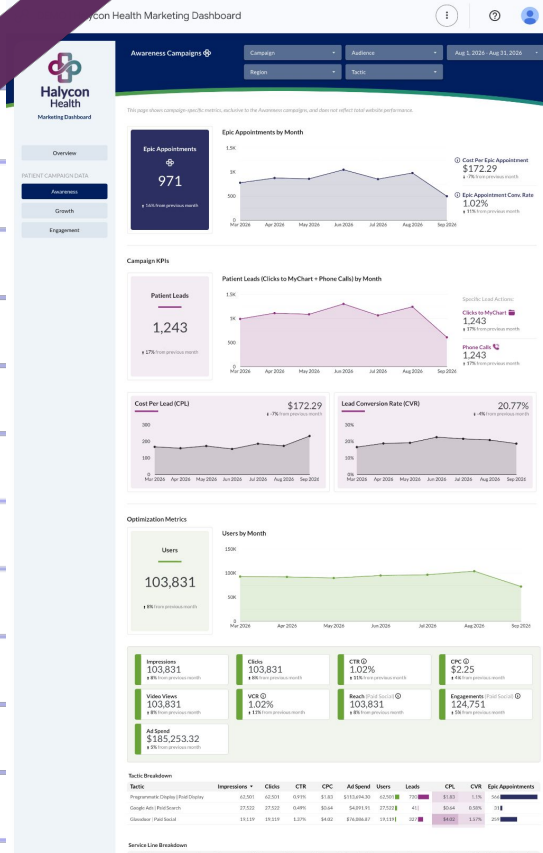
From launch, the team had access to granular attribution data: which ads and keywords were driving bookings, and whether the services booked aligned with the campaigns that brought them in.

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.

BUILDING A DASHBOARD - TYING IT ALL TOGETHER



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!



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WE ARE.
MARKETING
HAPPY.

