

Regional eye-care practice implements Experian's Aperture Data Studio to create a trusted, single patient view, resulting in business growth and a reliable patient experience

The team at a regional eye-care practice with 17 locations in the Midwest was excited to grow their client base when they acquired a patient list from another local practice. However, the organization was left with the urgency of assembling and validating the new patient list to maximize retention while delivering a seamless experience.

Challenge

Unexpectedly, the newly purchased patient list and corresponding patient record data was dispersed across several spreadsheets, with patient data ranging from name, address, email, and insurance. All of this information had to be uploaded into the eye-care practice's electronic health record (EHR) system.

Furthermore, the thousands of patient health records from the previous package also had to be uploaded to the EHR and correctly matched to the patient profile in the EHR. Time was of the essence because the patients had been promised that the practice would supply them with their health record as requested.

Unfortunately, the organization was looking at files that had an unclear number of patients, missing emails, inconsistent formats, and conflicting contact information.

Based on the data gaps and the need to quickly formulate a communication strategy to reach and retain active customers, the marketing team set out to find a solution. They did not have the benefit of an IT team or department. But they knew they needed a tool that could cleanse and standardize their data for client outreach, such as email campaigns, and eventually migrate the data to their practice management system (PMS).

With such an urgent, complex task at hand, the team maximized what they initially had to work with, leveraging the little usable data they could access to reach out to clients. As the marketing team began to explore the data set and consider the outreach goals, the division grew more concerned about the lack of confidence, personalization, and risk of sender reputation associated with the data. The marketing lead said that they were essentially put in a position of "building outreach without a firm foundation."

"Through validation and strategic extraction, Experian set the foundation for our practice to **confidently lean on the inherited data to market and communicate.**"

- Marketing Communications Leadership, Regional Eye-Care Practice

Solution

While the organization's marketing team communicated through multiple marketing channels how they could serve the patients of the former practice, they sought out a way to consolidate, match, standardize, and validate the patient data to kick start their retention campaign. Experian performed a data quality as a service using Experian's data quality platform, Aperture Data Studio, to support their efforts.

Aperture Data Studio ingested from various data sources with differing data, discrepancies, and formats. At this point, the data was profiled, standardized, validated, and appended with emails. From there, the now-clean data was deduped and harmonized to eliminate duplicate records. Multiple sources were then merged to create a complete and reliable single view of each record.

Transforming the data in this way enabled the practice to see the patient's name, contact information, insurance information, and other medical data in one record, as opposed to the previously siloed spreadsheets. Now the team had a trustworthy single view of their patients, a data set fit for effective outreach and eventually their system of records, in only 1.5 weeks. The team was able to lean on their work with Experian to better sync and communicate directly with their EHR. Using corrected and updated contacts through combined efforts empowered the marketing team to ultimately reach over 10K of the former practice's patients, with the expectation to convert approximately 75% of the active patients. And, as part of their migration, the team was able to move 100% of patients with transferrable records to the organization's PMS. This improved patient list will enhance their team's efforts as they move forward with their retention campaign.

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Results

The marketing lead said the team "feels secure with the clean Experian Data Quality list." The practice now has a foundation to retain clientele, deliver a seamless experience to potential new patients, and reap the benefits of their growing practice.

Time to value – The need to reach and retain clients from the former practice was urgent. Using Aperture Data Studio as part of the bureau cleansing service enabled Experian to turn around the project in a week and a half to provide the marketing team a usable contact list.

Single source of truth – With a verified contact list, the marketing team can use this contact data set as they build their email contact list and add active clients into their system.

Personalized marketing – With names matched to their best contact, the marketing team can more confidently personalize their emails and, in turn, the patient's experience with their practice.

Trusted sender reputation – With verified emails, the practice will no longer be at risk of being blacklisted due to sending too many emails to inaccurate or inactive inboxes. Further, they have greater confidence that their emails will reach the right recipient and not be directed to spam.

Better patient experience – A seamless and personal experience was a top priority for the organization as they reached out to both active and inactive clients to try to retain patients.