

# CUSTOMER **SUCCESS** STORY



## MARKETING CLOUD



## Duke Health Background:

Duke Health integrates the Duke University Health System, Duke University School of Medicine, Duke-NUS Medical School, Duke University School of Nursing, Private Diagnostic Clinic (Duke physicians practice), and incorporates the health and health research programs within the Duke Global Health Institute as well as those in schools and centers across Duke University, including the Duke Robert J. Margolis Center for Health Policy.

Duke Health is committed to conducting innovative basic and clinical research, rapidly translating breakthrough discoveries to patient care and population health, providing a unique educational experience to future clinical and scientific leaders, improving the health of populations, and actively seeking policy and intervention-based solutions to complex global health challenges. Underlying these ambitions is a belief that Duke Health is a destination for outstanding people and a dedication to continually explore new ways to help our people grow, collaborate and succeed.

**Headquarters:** Durham NC | **Industry:** Healthcare | **Website:** dukehealth.org



### **Great skills, great personalities!**

We are deep in the throes of a difficult custom deployment of Salesforce that includes Marketing Cloud and Health Cloud. The Cirrius team has been phenomenal. They are very knowledgeable and fun to work with. They listen and collaborate and solve problems like few other consultants I've worked with. I recommend them without reservation.

**Anne Brumbaugh –  
Senior Marketing  
Research Director**

## The Challenge

Duke Health is a national leader in educational healthcare services that relied on outdated legacy solutions and antiquated manual processes to connect and engage with their patients. Duke Health approached Cirrius Solutions with the challenge of implementing the Salesforce Marketing Cloud under very stringent security policies. Duke recognized that marketing teams were inefficiently putting prospects into spreadsheets on multiple databases and in many cases lost track of who was delivered marketing materials. Duke wanted the ability to see all marketing targets in one organized place so they could focus on lifecycle experiences and custom journeys based on patient demographics. They needed Customer Relationship Management (CRM) with the highest levels of security that complied with HIPAA and internal Duke policies.

- They needed a system to securely store client information with a high level of access security
- They needed to optimize send deliverability and reputation for the organization
- They needed custom HTML/CSS templates to comply with internal marketing guidelines
- Creation of advanced marketing playbooks to provide highly customized patient journeys
- Due to HIPAA guidelines all of the patient, provider, and doctor related data had to be completely encrypted

## The Solution

The Cirrius Marketing Cloud implementation started with an initial strategy phase to build an end-to-end roadmap for achieving Duke Health's vision and goals for patient focused marketing activities. The Cirrius team developed a digital strategy for data governance, support for a global data model, customized user experiences, internal usability and overall customer success.

- Implemented Salesforce Marketing Cloud for all marketing related communications
- Setup Journey Builder to send real-time messages across online and offline channels based on the actual behavior of the patient
- Setup Audience Builder to identify the appropriate patients based on the targeted health condition
- Implemented Social Studio with a drag & drop UI for Duke to run various activities automatically by defining a workflow and establishing a schedule
- During the project we implemented Platform Encryption using Salesforce Shield on all fields that included personally identifiable information
- ETL Integration with third party databased to load needed client information for marketing activities

## The Result

Duke Health customers have an interactive, personalized experience that creates meaningful educational community engagement. This flexible solution allows for Duke Health internal users to easily create, manage, and distribute educational healthcare information to its target audience. The solution provides better insight into patient relationships, content engagement, and brand awareness. The consumer-centric, digital-first strategy that Duke Health has been pursuing is now paying dividends with record-breaking growth and engagement at a time when patient security is at the forefront of patients concerns. The Duke digital channel, powered by Salesforce, has enabled them to be faster to market, deliver better experiences, and to drive scale with consistency in a way that they were not able to do before.

- Provided one central solution to store all Marketing related information reducing overhead
- Increased marketing automation to drive unique, targeted content at each stage of the customer journey
- Increased awareness of the Duke Health programs and value in the educational healthcare ecosystem
- Easier and faster data entry into Salesforce through the custom automation of patient information
- Simplified the process of getting the right content to the right patients at the right time
- Better Reporting on the performance of patient interactions based on Marketing related activities



“At Cirrius Solutions, we understand that time is your most valuable asset. We work with your business leaders to drive platform automation across the organization in order to save everyone involved much needed time. We provide white-glove service without the luxury price tag. We are built on integrity. We focus on building long-term relationships with our clients to provide strategic value.”

**Chad Anderson**  
Founder  
Cirrius Solutions