

NDA

Healthcare

Technologies

Sales Cloud

Marketing Cloud

Sites

SMS-Magic

Airslate

Company is an integrated medical office including the benefits of a medical staff working alongside Chiropractors and Rehabilitation Specialists.

Use CRM to capture and store customer data, track appointments, and send reminders through different channels.

Challenge / Problems

One of the main requirements of the company was the possibility for front desk staff to mark the arrival of patients/missed appointments and convert leads to accounts. They also wanted to send scheduled notifications about upcoming appointments to patients via not only email but also SMS.

Solution

Propeller Plan created a site that required front desk staff to log in using a username and password to access all necessary information regarding past/upcoming appointments and patients. Installed and configured the SMS-Magic solution. Created journeys in Marketing Cloud that are launched for Accounts or Leads that meet certain conditions.

Results

The company reduced its costs by not having to purchase Salesforce user licenses for each front desk employee. In addition, front desk staff can confirm patient appointments and convert them into invoices directly from the site, as well as download and print documents created using Airslate and completed by patients themselves before their appointment. This made it possible to significantly reduce the time spent by front desk staff on completing patient documents before their appointment.

The number of appointment cancellations was reduced since patients received advance notification of the upcoming appointment and had the opportunity to reschedule it if necessary. Leads who were interested in the services of this medical center, but did not make an appointment, received the scheduled emails with detailed information with attached articles and videos from YouTube about how this medical center can help their problems.