

*Case Study*

# Identifying Client Needs in an Enterprise-Level Healthcare Migration



*Case Study*

# Contents

---

1

Introduction / Identifying Client Needs

3

Ensuring a smooth transition

2

Developing the strategy

4

About RPE Origin

## Case Study

# Identifying Client Needs in an Enterprise-Level Healthcare Migration

A healthcare client of Red Door Interactive needed support with developing a plan to migrate from their existing customer relationship management (CRM) and marketing automation platforms to a system that better fit their needs.

Red Door Interactive reached out to the RPE Origin team for assistance with identifying the client needs, developing a strategy, and ensuring a smooth transition.



## Identifying client needs

The healthcare organization's marketing team had an existing CRM that wasn't a good fit, plus a separate marketing automation platform. Neither system connected to the many other systems within the organization, which meant employees were often exporting data from one system and importing it into another.

Manual exports and imports took extra time, created data security risks, and resulted in inconsistent data between systems.

*They needed a platform that could communicate with multiple other data systems, provide the necessary level of HIPAA compliance, and ensure brand consistency across all users of the platform.*

# Developing the strategy

The client selected a combination of Salesforce Health Cloud and Salesforce Marketing Cloud to meet their needs. The RPE Origin team met with IT staff for the client to assess existing data capabilities and discuss the data flows needed between systems to create a more streamlined and efficient process.



As more people got involved at the client level, the project expanded from a single department focus to an enterprise-level installation and migration.



With the shift to an enterprise-level approach, it sparked the need to evaluate each system being used for data and communication. Through that process, RPE Origin and other partners helped identify and eliminate redundant software programs to reduce the integrations required.

With a more streamlined tech stack, they were able to move forward with a new enterprise-level system and the right data flows to improve efficiency and protect data integrity.

# Ensuring a smooth transition

As with many projects where RPE Origin helps assess needs and develop strategies, one of the biggest wins of this project was the increased communication and collaboration between different departments.



Data integrity was another big win, with extensive data cleanup completed prior to migrating to the new system. The enterprise-level system also ensures brand consistency across all departments even as the organization grows.



**Red Door Interactive, RPE Origin, and other partners continue to support the client with ongoing data flow strategy, system integrations, and effective use of the new enterprise system.**

# About RPE Origin

We are the industry's only vendor-agnostic, email-centric agency serving enterprise companies throughout their digital journey. We aim to be an indispensable partner for enterprise and agency clients who rely on email for success.

Whether you need help choosing a new ESP, enhancing automated B2C or B2B customer journeys, or connecting data points across your tech stack, we help you move from simple to sophisticated to drive more revenue through email marketing.



Our team lives email every day, and that includes both email marketing and maximizing the connective tissue across all digital channels. With our customized approach and flexible services, we can do everything from one piece of the puzzle to the entire picture.

**Need help with your enterprise email strategy and systems?  
Contact our team to get the conversation started**

