

CBI-X's Cross-channel Campaign Drives 2X Pipeline Growth for Healthcare SaaS Vendor



THE CLIENT

Several hospitals and healthcare facilities in the United States currently avail of the Client's software services, which include NLP-based computer-assisted coding (CAC), clinical documentation improvement (CDI), compliance auditing, and analytics solutions. The Client's other services are medical coding, transcription, and revenue cycle management.

 INDUSTRY	Software
 LOCATION	USA
 HEADQUARTERS	USA

 CAMPAIGN TYPE	Appointment Setting
 TARGET INDUSTRIES	Hospitals, Healthcare facilities
 TARGET LOCATIONS	USA
 TARGET DECISION MAKERS	HIM Directors, CIOs, CFOs, Transcribers, Coding supervisors, CDI supervisors

HIGHLIGHTS

- ✓ Completed a 3-month appointment setting program targeting hospitals and healthcare facilities all over the United States for a healthcare SaaS company
- ✓ Achieved all of the Client's key campaign objectives, while exceeding their business goals
- ✓ Enabled the Client to grow its number of qualified appointments added to the pipeline by a two-fold expansion
- ✓ Allowed the Client's reps to pursue meaningful conversations with prospects, and to send more high-value proposals

CHALLENGE

Because of a sales cycle that regularly lasts for more than six months, the Client has made a routine of hiring out initial prospecting activities to third-party agencies. The Client has also decided to put its in-house sales team to work on nurturing and following up qualified opportunities and let the third-party agency take care of cold outreach.

However, the Client has not yet found an agency that satisfactorily handled its series of marketing initiatives designed to support its recent refocus and product rollout. Its earlier partnerships have had mixed results, which contained several issues, which were:

- Prospect lists still needing further profiling and updating
- Lack of time dedicated to product knowledge training

- Too many no-show appointments
- Lack of proper vetting and qualification for several appointments

The Client was forced to reassign a sizable part of the prospecting work to its in-house sales team, which also netted unsatisfactory results. Their appointments fell to 4-6 per month. The number of proposals sent also dropped.

With these results, the Client realized that outsourcing to third-party agencies made the most business sense. They just had to make sure to partner with an agency that was able to devote equal attention on securing enough quality sales opportunities.

RESULTS IN 3 MONTHS

49

qualified appointments

762

New Social Connections

THE CBI-X SOLUTION

The Client implemented a rigorous review process and eventually chose CBI-X as their partner. They cited CBI-X's comprehensive outreach approach in prospecting as a primary factor for their decision. CBI-X's extensive experience and knowledge in its industry, backed by a growing body of industry research, also contributed to the Client's choice. CBI-X's comprehensive outreach strategy also tended to deliver high-quality prospects at scale.

The Client also noted CBI-X's impressive technical background in marketing complex-sale products such as healthcare SaaS solutions. This made it easier for their agents to run the campaign and enabled them to deploy their campaign much quicker than expected.

CBI-X and the Client worked together to design the campaign plan. The plan included a 3-month appointment setting program, which featured a combination of phone calls, email marketing, and social media networking. Its overall goal was to set up phone demos with qualified prospects interested to learn more about the Client's SaaS offerings.

Appointment Setting

1. CBI-X reviewed hospitals and healthcare facilities all over the United States and drew up a list of these facilities to target. From this list, they segmented their targets into small, medium, and large institutions based on the number of hospital beds in each facility.
2. CBI-X also identified the potential key decision makers in each facility. They pointed out HIM directors, CIOs, CFOs, and persons in charge of clinical documentation.
3. CBI-X's agents began contacting each identified prospect either to schedule a phone demo between them and the Client's reps or to qualify them as leads.

Email Marketing

1. The campaign teams crafted email templates for the different touches in the prospecting cadence. These included emails for initial outreach, targeted send-outs, and follow-up emails.
2. Introductory emails were designed to warm up prospects, and help the team identify which of them to prioritize. Targeted send-outs allowed the agents to disseminate the Client's relevant materials to interested prospects.
3. CBI-X allowed the Client use of its pipeline tool, CBI-X's proprietary lead management, and CRM platform, to help set the touchpoints in the prospecting cadence.

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Social Media

1. CBI-X used LinkedIn to provide another set of touchpoints for nurturing and engaging prospects.
2. CBI-X's social media specialists grew the Client's network on LinkedIn, joined relevant groups, and engaged prospects using InMails.
3. CBI-X also used LinkedIn to collect additional prospect data to help them enrich their contact and appointment information, which they handed off to the Client.

RESULTS

During the 3-month pilot campaign, CBI-X successfully delivered 49 qualified appointments to the Client's reps. This meant a more than two-fold jump in total appointments compared to the appointments the Client's own in-house sales reps have typically produced in a similar period.

The campaign ran for a total of 66 days. The first part of the campaign comprised of setting the groundwork for appointment setting by warming up prospects and initiating contact through emails and social media activities. Most of the appointments generated in the campaign were secured in the campaign's first full month.

CBI-X's email marketing campaign also netted the Client open rates of 26.1%, click-through rates of 11.8%, and hard bounces of 0.07%. These numbers were still in the ballpark of the Client's own benchmarks. CBI-X's social media activities secured 762 new connections on LinkedIn and produced an InMail response rate of 12.7%.

17 and 21 appointments out of the total 49 were delivered in the second and third months, respectively, representing a clear upward trend. CBI-X's efforts in building rapport with their prospects, and nurturing their leads, during the campaign's first phase were translating into measurable results.

The Client grabbed the opportunity to ride this upward momentum by renewing its contract with CBI-X for an additional 3 months.

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