



HEALTH AND LIFE SCIENCES USE CASE

Patient Sign Up

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Available In	all editions
Channel(s)	Web
Play Title	Health and Life Sciences - Onboard
Use Case Name	Onboarding Next Steps
Use Case Overview	<p>The 'Patient Sign Up' use case' will increase the patient sign up rates, ensuring they are aware of the steps in the process, and they complete them all. There may be a number of key things you need to know from a prospective patient, to best align them or recommend the right practitioner.</p> <p>By <i>setting</i> out the steps in the process, and tracking the progress you can make sure the prospective patient is aware of what is needed.</p> <p>By <i>tracking</i> all the steps in the journey in Interaction Studio you can also remind the visitor if they stop completing the forms, and go to another part of your site.</p> <p>By <i>understanding</i> what steps they have taken, and what they still need to do, you can remind them to come back to the form and complete the next step in the process.</p>
Targeted Audience	B2C
Location	On the registration form for progress and tracking. Any pages across the site if they abandon the process.
Business Challenge	<p>You have invested a lot of time and money putting your site together, and the content within it, with the goal of having visitors complete the form and become a patient. It is key that the final step in the journey is as seamless as possible. If you have too many pages on your form, or the visitor has to leave the site to find other information to complete the process you have a point of friction in the journey and may lose some prospective patients as a result.</p> <p>Providing a smooth registration experience not only increases the patient sign up rate, but also means those patients are more likely to remain with your practice.</p>
Personalization Solution Approach	<p>By understanding the key actions a visitor must take when they complete your registration process, you can remind them of those steps as they go through the form. Once they have registered, if there is additional information that you need, then you can remind them when they are on the site, or logged into the patient portal, so that their profile is fully complete.</p> <p>During the registration process, creating segments of visitors who are each of the 5 stages, in this example, you can determine who is at stage 2, but has not been to stage 3, and use that segment to power the 'You should now complete stage 3' experience, if they leave the form and navigate to a</p>

different part of the site.

Another benefit of tracking the key actions, and the patient completion rate, is that data is available in Interaction Studio for your Patient Support Team to review, and create segments of which visitors are at which point of the onboarding journey, allowing them to proactively step in if help is needed, or add them to a segment so that they can be sent to Journey Builder and added to an email journey.

Suggested Campaign

[Web Banner Replacement](#)
[Web Infobar](#)

Configure Your Campaign

[Create your segment](#) based on the actions that need to be taken during registration. As noted above the segment will be people who have completed page 1, people who have completed page 1 but not completed page 2 etc.

Use the instructions below in conjunction with the personalization solution approach above to build your campaign.

1. [Create a Web Campaign from a Template](#)
2. [Use Targeting Rules for Web Campaigns](#)
3. [Templates - Developer Documentation](#)

Considering Your Goals & Testing Approach

Goals:

- The primary goal is to get the visitors to complete the registration process.
- The secondary goal is to get the patient to provide additional required information once they have registered.

[Best Practices Doc for Testing Approach](#)

Before You Publish Your Campaign

Review the [Create a Campaign](#) steps and [Test Your Campaign](#) before setting your campaign live.

Review & Interpret Your Results

Consider a visitor's interaction with a particular page, including how they arrived there and what they're expecting.

Use the documents below to help you set up your campaign stats screen and interpret your results.

[Campaign Statistics](#)

The hypothesis for this campaign will have a higher primary goal completion rate than the control group.

You can also expect that the group who sees this campaign will have a lower customer attrition rate long term and a higher overall lifetime value.

Recommended KPI's:

- Click Through Rate
- Make an appointment
- Visit Patient Portal
- Time on site

Additional Resources

[Interaction Studio e-Campus Knowledgebase](#)
[Support](#)



Optimize Your Use Case

Review the [Recommended Optimizations Based on Key Performance Indicators](#) to see where you can optimize based on the results you are seeing.

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