Iterable

by Head of Product

Patient Marketing Automation

Details

Review Date	07/07/2023
Purchase Date	Q2'21
Implementation Time	N/A
Product Still in Use	Yes
Purchase Amount	N/A
Intent to Renew	N/A
Review Source	Elion

Product Rating

Product Overall	4.5
Use Case Fit	5.0
Ease of Use	4.0
API	4.0
Integrations	N/A
Support	4.0
Value	4.5

About the Reviewer

Purchasing Team | Implementation Team | Product Oversight

Reviewer Organization

Virtual-First Provider | Physical Therapy | Women's Health

Reviewer Tech Stack

DrChrono

Other Products Considered

N/A

Summary

- **Product Usage: The reviewer uses the product for marketing and transactional communications, automating these processes throughout the customer lifecycle.**
- **Strengths: The product is user-friendly, versatile, and allows for thorough customization of messaging and workflow creation.**
- **Weaknesses: The integration process took longer than anticipated, primarily due to resource restraints at the beginning of the project.**
- **Overall Judgment: The reviewer speaks highly of the product and predicts continued usage due to the customizable features and reliable functionality. It's particularly recommended to those with adequate resources to tackle a robust integration process.**

Today, we'll be talking about Iterable and how it's being used at your company. Before we jump into that, could you give a brief overview of your company and your role there?

Sure. I lead product and technology at a physical therapy company specializing in pelvic floor and whole body PT for women and people with vaginal anatomy across the US. We offer both in-person and virtual PT. We have a number of in-person clinics, and we launched nationwide telehealth earlier this year.

When did you purchase Iterable, and how long has it been in production for you?

More than two years at this point. The Iterable integration with DrChrono, our EHR, was one of the first projects that I took on. It was May 2021 that we got it into production.

Which types of users interact with this product and what are their workflows?

Our goal is to schedule all marketing and transactional communications with prospective and existing patients. And we're moving into provider outreach as well. We're trying to automate those communications throughout the lifecycle, from the first touchpoint, throughout the patient's treatment, and beyond. Internally, the people interacting with Iterable are marketing, product, and engineering. We have a dedicated marketing manager working in Iterable - she builds all of the journeys and the campaigns for our patients. Engineering's responsibility is to make sure that the data is there, both user-level data and event data that comes from a couple of different sources.

What are some of the primitives that the tool provides her, and what are the data inputs she can work with?

So you can think about it as a collection of patients and prospective patients in a directory. For each patient, there are properties, and then their events. And it's all customized, based on what data you feed it. And so we've tried to send as much data to Iterable as we can; we do have a BAA with them, and it's a HIPAA-compliant tool. We can send PHI without issues. So for a user, we have the patient's demographics, information that they provide to us in their intake forms, as well as appointment information and some high-level aggregated metrics that we calculate. And those are all of the field properties.

Complementary to that, we have event data, which comes from many different sources. It comes from our EHR, so each time an appointment is created or modified, all that information gets sent to Iterable. That allows us to create appointment confirmation emails that say, "Hey, your appointment is coming up on Monday at this date, this time, this location", and we're able to send reminders for those as well. We also have events associated with our patient dashboard experience as well. Being a PT company, exercise and education is a really big part of our plan of care. And it's really the nature of our patient dashboard that we've built in-house. So every time that a physical therapist creates a program for a patient and sends it to them, the patient will receive a notification either via text or via email saying, "Hey, your PT created a new program for you to check out." In a sense, we use Iterable as a proxy for push notifications, since our patients are using our web-based app rather than a mobile app.

Are the patients able to customize their preferred forms of communication?

No, but that's a capacity limitation on our end. I think you could absolutely do that in Iterable. I think you would just have to build different journeys, which allow you to say "After this event, wait this amount of time, and if a patient meets

certain criteria, then send them this message." To enable multiple forms of communication, we would need to add more journeys that say "if the patient selected SMS as their preferred communication method, send them a text; if they prefer email, send them that", so it would require creating more customized journeys for the patients.

Are there any features you are not currently using with Iterable?

They have this notification inbox that we could embed into our web application. We haven't had much of a chance to explore this yet, but I think this could be a cool thing for us. So you can create an in-app inbox where patients can review past notifications that they might have dismissed, and have everything in one central spot for notifications. I haven't explored this or tested it with any users though, so I don't know if it's even something that people would have an appetite for.

You mentioned earlier that you integrated with DrChrono. I'd love to understand the integration ecosystem better.

Yeah, of course. So, with the initial implementation, we were trying to outline the ideal messages we wanted to communicate, the overall lifecycle for our users, and what's ideal from their perspective. Then we worked backwards, determining what data we needed to build these journeys, and that was a really detailed mapping exercise, just getting data mapped from our other systems into Iterable.

Once we got that structure in place, we integrated data from DrChrono, so we set it up to listen to our "appointment created" and "appointment modified" events, either rescheduling or canceling, as well as events for "patient arrived" and "appointment completed". So we're starting to build this history of what's going on with the patient's appointment history. We have some other webhooks that we listen to and pull data from, but those are the main ones.

Every time an appointment is created or modified in DrChrono, a webhook will trigger our backend; we'll process it, modify the structure of the event, add some additional fields, and send it to Iterable. That's the happy path, but we also have some retry logic in case one of the platforms goes down. If we get rate-limited by DrChrono, which happens, or Iterable, which never happens, or if there's downtime on either platform, we want to make sure we can hold the state and retry.

Sounds like a pretty robust message queue.

So that's just one path. We send events in from other sources as well, but that's just one example.

Got it. So, with Iterable, the API works. It feels robust and fairly comprehensive, but do they have a marketplace of off-the-shelf integrations that work out-of-the-box?

I think they do have one. I've explored it a little bit, but many of their marketplace partners are not HIPAA-compliant, which of course poses a problem for healthcare. For example, I know they have Zapier, but that's not a HIPAA-compliant solution. They also have Amplitude, but we're not using any of their pre-canned integrations at this time.

In terms of the integration process, were there any gotchas or hiccups or did you feel like it was fairly straight-forward overall?

I mean, this is two plus years ago at this time, and our engineering team was not quite where it is today. We were not quite resourced well when we took this on initially. And so I think it took a little bit of time to think through all of the queuing systems, retry logic, and data re-shaping that needs to occur. I think it took a little bit longer than we expected.

Going back to the procurement decision and sales process, I know that you came on board around the same time that you needed to do the integration. Were you involved in the procurement process itself?

I was not. I do know our Head of Marketing had worked with Iterable at a previous company. And I think that was one of the main reasons why we selected Iterable. Also, it's a HIPAA-compliant CRM, although I imagine there's others out there that are too.

Do you feel like Iterable was the right product, looking back?

Yeah, I'm very happy with it across the board. In terms of third-party platforms that we engage with, Iterable has always been a top favorite. I think it's been very powerful, just in terms of how we've been able to customize, even from a branding perspective. We've been able to really get creative with our scheduling and campaigns as well. It's been very reliable and we've had some really good customer success managers as well, which is really helpful. They meet with us on a monthly basis, and we've gotten to join some betas. It feels like they're really continuing to improve the platform.

I'd love to chat about their support, account management, and overall level of customer service.

We've been, I think, pretty fortunate. We had our onboarding team and loved our onboarding manager. Very, very detailed, like I mentioned. Like with this data mapping exercise – they were very hands-on with making sure that you had everything mapped out to get started, and since then, they've been quite responsive with helping us through some creative things that we wanted to build, and giving us insight into their roadmap as well. They're pretty transparent about that.

What do you like most about the product?

I love the user-friendly power of it, our ability to customize the messaging that we want, and schedule all of it through the platform. It's amazing that they empower a non-technical person to build these workflows on their own.

Totally. Is there anything that you really tend to dislike about the product?

Not from my perspective, and maybe some of the marketing team might think differently, but we've been able to achieve our goals with the platform.

What's the likelihood that you'll be continuing to use the product in 24 months?

Very likely, we will still be on the platform. I think the only likely scenario where we would switch off is if we were switching to another EHR that already had a lot of these capabilities. But I don't anticipate that another EHR or clinical ops platform would be able to replicate the same level of granularity and customization that we do in Iterable, so I'd say it's very likely we'll still be working with them in several years.

Finally, do you have any advice for someone who is in their search for a CRM?

Yeah, we've been fortunate with our engineering resources to be able to get it into the spot that it's in. The integration was pretty heavy, in terms of setup, but it's now very self-managed. It's important to make sure that you have the right team to be able to set up something like Iterable. I think some CRMs are a little bit lighter-weight, maybe more

off-the-shelf, and this is not like that. It's great for those that are looking to really customize and fine-tune their company's lifecycle messages, but not great for someone looking for a plug-and-play solution.