

# Fertu








by Head of Marketing

Patient Marketing Automation

## Details

Review Date	01/31/2024
Purchase Date	Q1'22
Implementation Time	Co-development partners with continued implementation.
Product Still in Use	Yes
Purchase Amount	Tiered license fee per contact volume, plus production costs
Intent to Renew	100%
Review Source	Vendor

## Product Rating

Product Overall	 4.0
Use Case Fit	 4.5
Ease of Use	 3.0
API	 N/A
Integrations	 4.0
Support	 5.0
Value	 4.5

## About the Reviewer

User Implementation Team

Product Oversight

## Reviewer Organization

Care Navigation

## Reviewer Tech Stack

Kustomer Salesforce Health Cloud

## Other Products Considered

Iterable Salesforce (Health Cloud)

## Summary

- **Product Usage:** The product was used as a HIPAA-compliant patient engagement and marketing across a variety of communication channels.
- **Strengths:** The product showed strengths in commitment to compliance, customizability, and an ability to effectively manage multiple communication channels.
- **Weaknesses:** A noted weakness was the lack of self-service options aside from reporting, which required a significant amount of time and effort from the customer.
- **Overall Judgment:** Despite the need for more self-service options, the product was seen as valuable in achieving high activation levels among customer populations and providing necessary scalability. The team deemed their decision to use this product as correct.

## Review

### **We're chatting about Fertu and how it was used at your previous company. Before we jump into that, could you give a brief overview of the company and your role there?**

I was head of marketing at a company specializing in patient engagement and benefits navigation for Medicare Advantage plan members. I was responsible for our technology product and the accompanying services. Our solution included a primary engagement mechanism and additional customer support services for instances when the technology alone couldn't fulfill the member's needs. I was focused on patient engagement and marketing functionality.

### **What was the need that drove you to look for a product like Fertu?**

When selecting a technology solution for patient engagement and marketing, HIPAA compliance, patient privacy, and the ability to sign a Business Associate Agreement (BAA) are essential. We required a partner who could scale with our needs, especially since we were contracting with Medicare Advantage plans covering a large number of individuals. Our company, having just completed a Series A funding round with around 25 staff, lacked the resources to allocate engineers to marketing projects, so we needed a partner that could serve as an extension of our team.

We needed a vendor adept at multi-channel marketing that would take into account our Medicare Advantage demographics, including age, location, language, and socioeconomic status. Most marketing automation products specialize in a single channel, like Iterable, which focuses on mainly email, texts, and perhaps push notifications. Our aim was to engage members through phone, direct mail, email, and text without managing disparate vendors for each channel. Fertu provided a comprehensive solution to manage all our channels, allowing for a sophisticated, responsive member journey.

### **Were there other vendors that you were looking at while evaluating Fertu, and how did they stack up?**

We considered Salesforce Health Cloud but found it too resource-intensive for our capacity, especially in terms of development and ongoing maintenance. Our engineering team lacked the necessary expertise for such a platform. We also evaluated single-point solutions like Iterable to manage various channels.

With our startup mindset and our founders' and technology leaders' previous experience in creating engagement products, we considered building our own solution so we could have complete ownership and control over the outcomes. Ultimately, though, we chose to work with Fertu because, as they were very early in their development, we could work together to develop a product that allowed us to get the specific functionality and support we needed. This partnership gave us the advantages of building our own system but without the responsibility for the technology's long-term management.

### **You used both Kustomer and Salesforce at different points. How was Fertu's onboarding and setup process with these CRMs?**

One of the things I appreciated about Fertu was that their team had extensive experience in healthcare technology, which meant they understood compliance, risk, and the sector's unique language. This made collaboration and implementation smoother compared to starting with a vendor unfamiliar with healthcare. The project felt more like a product development or design process. I drafted requirements for patient journeys and specified the data for

automation triggers and sequences, and Fertu executed the development work, putting time into understanding the data from our partners and how it could inform automation.

Fertu set up all of our secondary systems—Twilio, email, direct mail—and worked with our engineers to integrate with Kustomer, and later Salesforce when we switched CRMs. The information exchange between our systems was on a 24-hour cycle, which suited our non-real-time nature.

Together, we built new data architecture to reflect Fertu’s activities in our system, aiming to eventually compile all member interactions within the CRM for an ultimate source of truth. But our main focus remained on creating outreach sequences, segmenting populations for testing, and driving activations—our key success metric.

**With the CRM as the ultimate source of truth, was Fertu working toward being able to write back via the API into the CRM?**

Our intended goal was for real-time processing, which they’d achieved for other clients, allowing more immediate data synchronization into the CRM. However, we decided not to prioritize this due to Engineering and Support having other priorities. Real-time data wasn’t necessary for our service delivery execution.

**Can you describe some of your company’s use cases for Fertu?**

Our user journeys involve connecting with members of a Medicare Advantage plan, introducing our services, and motivating them to engage with us. We created multi-channel education and engagement journeys that span six to eight weeks using direct mail, text messages, phone calls, and emails, based on data availability and channel permissions. We use Fertu to introduce our services as part of their health plan, spark interest, and ultimately convert them to contact us for high-touch enrollment discussions.

To optimize these strategies, we continually iterated on messages, tested various cadences, and adjusted our approach based on member responsiveness. We also leveraged Fertu’s cohort-based reporting tools to analyze engagement across different demographics, drawing insights on which tactics work best. This was critical for efficient resource allocation, particularly regarding direct mail and the fine-tuning of our outreach.

Overall, Fertu equipped us to run lengthy campaigns, measure their effectiveness, and gain valuable insights in a HIPAA-compliant manner without the need for additional analytics resources.

**How would you characterize the strengths and weaknesses of Fertu?**

Strengths include their commitment to compliance, which is non-negotiable in healthcare. Additionally, they offer significant customization capabilities, allowing for tailored solutions that align with specific needs—this is particularly valuable when in-house development resources are limited.

As far as weaknesses, the platform initially offered limited self-service options, especially for tasks beyond reporting, making it less of a “what you see is what you get” service. Users couldn’t simply define campaign cohorts without more in-depth involvement from Fertu. This required a more hands-on approach from customers, which, while potentially beneficial for getting precise outcomes, also demanded considerable time and effort. Essentially, partnering with Fertu was more like adding to our team than using a straightforward vendor service.

**Did that evolve into a product where you could do those things yourself?**

Over my 18-month tenure collaborating with Fertu, we relied on a meticulously crafted product requirements document, akin to having a part-time product manager role. Our collaboration hinged on this tailored document, driving order placement and backend execution. We had access to self-service reporting but not to the campaign builder feature. However, that workflow may have changed for new users today.

**Were there any reliability issues, bugs, or stability issues?**

Not having the traditional UI or self-serve component changes your concept of a bug or reliability. In our experience with the product, we encountered some data reconciliation challenges, such as when a column header was altered without our knowledge. This required us to depend on Fertu's monitoring systems and procedures to identify potential issues. The interdependency of our systems introduced risks, particularly if both teams were not fully aligned, as this could inadvertently cause disruptions. However, these issues were different from what is typically considered traditional bugs, such as unresponsive modals or issues with template saving. We had no problems with scheduled sends across various channels. If there were issues, they were handled behind the scenes, and I wasn't aware of them.

**Looking back, do you feel like your team made the correct decision in moving forward with Fertu?**

Yes. We achieved high activation levels among our customer populations that we wouldn't have realized by using a combination of vendors. As the sole member of the marketing team with limited tech resources, the scalability Fertu provided and their ability to manage multiple channels seamlessly was vital. However, we approached it as a co-development process, which was sustainable at that stage of business, but it wouldn't have been practical long-term. Constant coordination would eventually outweigh the benefits of customization. As our members increased, we'd need a UI and more self-serve options. And they may offer those options now.

**What do you see as specific areas that can be changed or improved about Fertu?**

The main area I'd like to see improved in Fertu's platform would be evolving toward a more self-serve experience, which is essential for catering to a broader range of healthcare organizations. Although Fertu excels in data reliability and accessibility, clients need to collaborate closely with account managers or product management partners to extract the full value from the service. Increasing the platform's end-user focus and enhancing its UI for reporting could significantly reduce the necessity for this level of support in the long term.

**Do you have any advice for folks who are looking at their patient marketing automation IT strategy right now?**

It's essential to consider the vendor's expertise in healthcare data, given the industry's regulatory complexity. A vendor like Fertu, which focuses exclusively on healthcare, offers a significant advantage in this respect. You also need to assess the vendor's capability of managing technical aspects like evaluations, implementations, maintenance, and uptime monitoring. A vendor that can handle these responsibilities or assist with customization and integration as a true partner can greatly benefit startups with limited engineering resources, though those features may not be as important to larger organizations with more resources. Working with vendors who are well acquainted with the healthcare sector and willing to share the workload has been successful for us.