# Welkin Health

by Operations Leader

`Care Management`   `Electronic Health Record`   `Headless EHR`   `Patient CRM`

## Details

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|---|---|
| Review Date | 06/27/2024 |
| Purchase Date | Q1'24 |
| Implementation Time | 2-3 weeks |
| Product Still in Use | Yes |
| Purchase Amount | implementation fee, per-user fee |
| Intent to Renew | 0% |
| Review Source | Vendor |

## Product Rating

| | | |
|---|---|---|
| Product Overall | | 4.0 |
| Use Case Fit | | 3.0 |
| Ease of Use | | 4.0 |
| API | | 4.5 |
| Integrations | | 2.0 |
| Support | | 5.0 |
| Value | | 4.0 |

## About the Reviewer

`Purchasing Team`   `Product Oversight`

## Reviewer Organization

`N/A`

## Reviewer Tech Stack

`N/A`

## Other Products Considered

`Braze`   `Dialpad`   `Freshdesk`   `Salesforce (Service Cloud)`   `Zendesk`

## Summary

- **Product Usage: The product is used as an all-in-one system for phone communications, ticketing, order management, and customer automation processes, including follow-ups and reminders.**
- **Strengths: The main strength of the product is its powerful automation capabilities and its flexibility, making it conducive for varied strategies in healthcare firms.**
- **Weaknesses: Phone and ticketing functions are basic and are areas that could be improved.**
- **Overall Judgment: The system has proved extremely useful for achieving product-market fit by acting as an all-in-one solution negating the need for multiple SaaS tools.**

**Today, we're chatting about Welkin and how it's used at your company. Before we begin, could you give a brief overview of the company and your role there?**

Our focus is on weight management and assisting individuals with chronic conditions through a direct-to-consumer approach. Customers fill out an intake questionnaire to determine if they're suitable for our program. Once they sign up, they consult with a doctor who devises a personalized treatment plan. Our platform supports medication adherence and tracks lifestyle and nutrition changes to help users reach their goals. I oversee operations, growth, and customer experience, managing our workflow from beginning to end.

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

We needed a comprehensive solution that provided visibility into the entire customer lifecycle, allowing for real-time interventions and issue resolution, including response management for customer inquiries and delays. We also aimed to automate common care journeys, using email and SMS to enhance the customer experience. The system needed to include order management, customer experience ticketing and workflows, and automation features.

**What were the requirements you used to evaluate the various products?**

Our evaluation centered around several key capabilities:

Order visibility: We required a system that allows users to easily track customer lifecycles.

Support ticketing: A tool to handle customer and prospect inquiries was essential.

Shipment insights: The product needed features to monitor shipments and provide tracking details.

Order escalation: We looked for the ability to set custom rules for order issues and breached service level agreements.

Customer check-ins: We required a system to automate customer check-ins throughout their journey.

Customer satisfaction: It was important to have a mechanism to gather customer feedback.

Phone support: We needed robust phone functionality, including Interactive Voice Response and a dialer.

Follow-ups and confirmations: The system had to support the management of monthly reminders for medical check-ins and integrate customer questions into the customer experience workflow.

**What were some of the other vendors that you evaluated, and how did they stack up against Welkin?**

We evaluated CRMs like Freshdesk and Salesforce, customer success tools such as Zendesk and Gladly, and contemplated building a homegrown system integrating SaaS tools like Braze for workflow automation and Dialpad for phone systems. Welkin stood out for its healthcare focus, particularly with security and privacy. Its all-in-one capability for support ticketing, order lifecycle management, and automations meant we could rapidly test our customer experience and pursue product-market fit. Additionally, Welkin's smaller size and hands-on implementation team, especially our contact there, made us feel they would be attentive partners. Conversely, larger companies like Salesforce usually require third-party assistance, which seemed less ideal for our starting phase.

**How did you find the sales process?**

The sales process was efficient. We were on a tight timeline, so I felt I was pushing more than the sales team, since our use case didn't align perfectly with their core services. Welkin is tailored for providers who are handling insurance billing and telehealth, and we were slightly outside of that focus. It was an unusual situation where I was more of the driver than the sales representative.

**How was the onboarding process?**

Onboarding was smooth; we had a knowledgeable person assisting with our implementation. They engaged in a comprehensive session with our engineering team, demonstrating the processes, after which we took over, with them available to address questions. This support and regular check-ins continued for several months, providing guidance as we encountered actual issues in operation. Our team managed to accomplish a significant amount on their own, which was great.

**What use cases are you using Welkin for at this time, and what features are most useful for you?**

We're currently utilizing Welkin as our all-in-one system of record for a variety of workflows. It handles our phone communications, ticketing system, order management, and customer automations, which include follow-ups and reminders.

**What do you see as the strengths and weaknesses of the features Welkin offers?**

Welkin's automations are a strength, offering considerable flexibility for healthcare companies looking to experiment with different strategies. However, some of its features, like phone and ticketing functionalities, are more basic and could be improved—they're serviceable but not particularly advanced. Overall, Welkin has been instrumental in us achieving product-market fit by providing an all-in-one solution that precludes the need for multiple SaaS tools.

Welkin is well suited for direct care providers, with features like embedded telehealth functionality and revenue cycle management. While our focus is on program offerings and integrating various services rather than direct care, Welkin's capabilities would be particularly beneficial for those involved in medical decision-making and care delivery.

**Have you found the platform to be fairly reliable, stable, and bug free?**

The platform is reliable, and the team is responsive. We haven't experienced any major bugs.

**How was the API developer experience?**

We successfully integrated our API with their order management system and utilized their APIs to extract data from Welkin into our BI tool. Our engineering team found their APIs user-friendly and reported a positive, collaborative experience with their team.

**Do you have any tactical advice for other folks who might be considering building on top of Welkin or integrating with Welkin?**

Ideally, map out all your requirements first and do a POC to make sure that you feel like it's going to be the right fit.

**How are the account management and support teams with Welkin?**

Good. We started with weekly check-ins initially for three months before moving to monthly touchpoints. They conduct a roadmap review with us on a monthly basis and circulate a newsletter. Their hands-on approach is effective, and working with a smaller company like Welkin was beneficial because the support staff were very familiar with our specific needs.

**Looking back, do you feel like you made the correct decision in going with Welkin?**

It was definitely the right move when we started out. Being a new company with no customers or revenue, we needed a comprehensive, flexible SaaS solution that was tailored for healthcare and promised to protect our customers' information. Welkin fit the bill perfectly.

**What do you see as areas of potential growth for Welkin?**

Welkin is expanding by developing solutions suited for healthcare providers, aiming to complement or replace existing EHR systems. There is a lot of room for growth in the direct-to-consumer, ticketing-focused applications, but their product roadmap doesn't appear to focus on enhancements in that area.

**Do you have any advice for potential buyers who are looking at Welkin right now?**

As with any product like this, it's important to clearly identify your specific requirements. Don't just look for a feature to be present; assess how well that feature meets your needs. For instance, if ticketing is vital for your operations, you need to ensure that the ticketing functionality is not just available, but also sufficiently robust to handle your demands.