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# Engage Consumers with Custom Experiences: How UPMC Builds Journeys that Meet Customer Needs

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# Our Speakers



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# Forward-Looking Statements



This presentation contains forward-looking statements about the Company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth, environmental, social and governance goals, expected capital allocation, including mergers and acquisitions (such as the proposed acquisition of Slack Technologies, Inc.), capital expenditures and other investments, expectations regarding closing contemplated acquisitions and contributions from acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the Company's results could differ materially from the results expressed or implied by the forward-looking statements it makes. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: risks associated with our ability to consummate the proposed Slack Technologies, Inc. transaction on a timely basis or at all; our ability to successfully integrate Slack Technologies, Inc.'s operations; our ability to realize the anticipated benefits of the proposed transaction; the impact of Slack Technologies, Inc.'s business model on our ability to forecast revenue results; disruption from the transaction making it more difficult to maintain business and operational relationships; the impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain service performance and security levels meeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; our ability to secure and costs related to data center capacity and other infrastructure provided by third parties; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services beyond the CRM market; the success of our strategy of acquiring or making investments in complementary businesses and strategic partnerships; our ability to compete in the market in which we participate; the success of our business strategy and our plan to build our business; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the valuation of our deferred tax assets and the release of related valuation allowances; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property; uncertainties regarding the effect of general economic conditions; and risks related to our debt and lease obligations.

# Discussion Agenda

## SECTION 1

Improving Engagement and Experience with Journeys

## SECTION 2

Relationship Growth and “How to” for Building a Database

## SECTION 3

Leveraging Content to Support Consumer Engagement

## SECTION 4

Three Top Takeaways on our Path to Success

## SECTION 5

Moderated Discussion

## SECTION 6

Audience Q&A

"The digital technology and retail disruptors entering healthcare are not just consumer-oriented but actually consumer-obsessed.

If legacy healthcare stakeholders don't realize that, they'll become increasingly less relevant."

Zeev Neuwirth, MD Chief Clinical Officer:  
Care Transformation



Atrium Health



# Personalizing Patient Engagement



2/3

of consumers expect a company to understand their unique needs <sup>1</sup>

48%

of consumers will unsubscribe if they receive a message that is not personalized or helpful <sup>2</sup>

52%

of consumers expect offers to always be personalized <sup>3</sup>

80%

better performance for industry leaders in customer experience <sup>4</sup>

<sup>1</sup> **Salesforce**: Mastering Customer Engagement

<sup>2</sup> **Gartner**: Executive Guidance - Personalization - Q1 2022

<sup>3</sup> **Salesforce**: State of the Connected Customer Jan 2022

<sup>4</sup> **Qualtrics**: Forrester Study: Economic Impact of Qualtrics Customer XM



# Meeting New Healthcare Expectations



Although innovation is a high priority, **insufficient organizational structures and processes** get in the way of success.

 **95%** of consumers say it's important for provider organizations to send communications relevant to their specific needs


**28%**  
DUPLICATED

**61%**  
DYNAMIC

**11%**  
SILOED



## A New Era of Engagement

 **75%** of healthcare consumers wish their experiences were more personalized

 **93%** of healthcare consumers say it's important for providers to proactively communicate with them



## About UPMC

A **\$23 billion health care provider and insurer**, Pittsburgh-based UPMC is inventing new models of patient-centered, cost-effective, accountable care. The largest non governmental employer in Pennsylvania, UPMC integrates more than **92,000 employees, 40 hospitals, 800 doctors' offices** and **outpatient sites**, and more than **4 million-member Insurance Services Division**, the largest medical insurer in western Pennsylvania.

In the most recent fiscal year, UPMC contributed **\$1.7 billion in benefits** to its communities, including more care to the region's most vulnerable citizens than any other health care institution, and paid more than **\$900 million in federal, state and local taxes**.

Working in close collaboration with the University of Pittsburgh Schools of the Health Sciences, UPMC shares its clinical, managerial and technological skills worldwide through its innovation and commercialization arm, UPMC Enterprises, and through UPMC International. U.S. News consistently ranks UPMC Presbyterian Shadyside among the nation's best hospitals in many specialties and ranks UPMC Children's Hospital of Pittsburgh on its **Honor Roll of Best Children's Hospitals**.

For more information, go to [UPMC.com](https://www.upmc.com)



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# Our Journey to Date

## UPMC + Salesforce Partnership Over the Years



### ExactTarget

Email Studio  
Automation Studio  
(Deployed by Flying Cork)  
**Marketing Cloud**

### Advertising Studio

...and additional Marketing Cloud capabilities: Mobile Studio, Content Builder, Contact Builder, Personalization Studio

### Interaction Studio 1.0

and Premier Support

### Audience First

Omni-channel  
Data-Driven  
Personalization

2012

2017

2019

2021-22

2016

2018

2021

### Marketing Cloud

Journey Builder  
Web Studio

### Audience Studio

(formerly DMP)  
Media Buying Optimization

### Interaction Studio 2.0



# Building Opted-In Audiences Email Strategy

Currently Have

**Over 2.5 Million**

Opted in Consumers in our Database (*email addresses and SMS*)

UPMC curates over 100 different content types across category quarterly newsletters, bi-weekly newsletters, campaigns-related newsletters, specialty-specific newsletters, etc.

HealthBeat

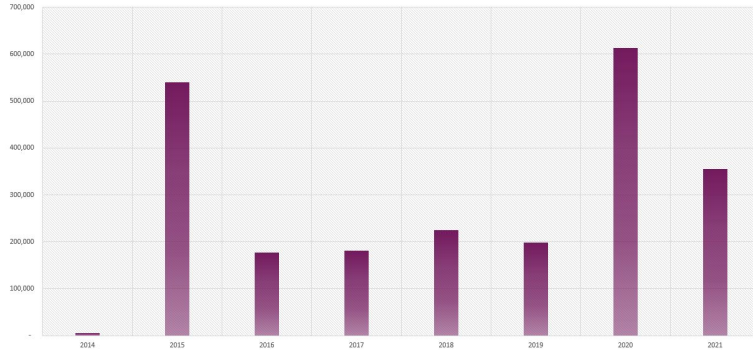
Ortho & Sports Med

LDLT

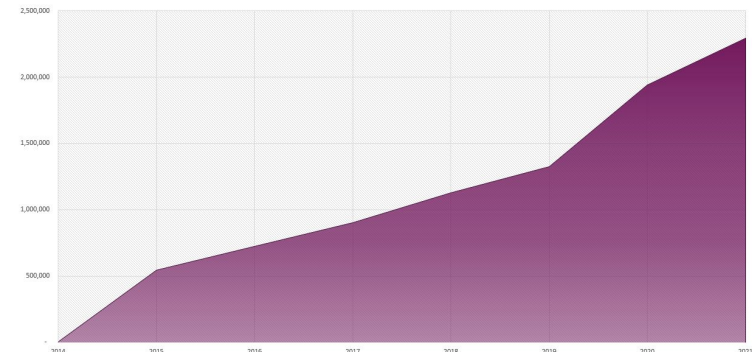
Health & Wellness

Recently launched a **regional newsletter strategy** to deliver **dynamic local content** across our newsletters based on **subscriber geos**

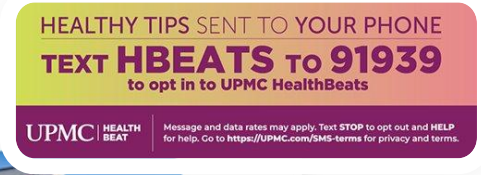
New Subscribers



Total Subscribers



# Building Opted-In Audiences SMS Strategy



Fri, Aug 27, 12:11 AM

HBEATS: World-class health care is right at your doorstep. Residents of central PA can receive treatment close to home at UPMC West Shore. <https://upmc.me/UDno38>



4:26 PM

HBEATS: Erie residents can receive great care close to home at UPMC Hamot. <https://upmc.me/9er7fn>



SMS is a growing marketing channel, with our subscribers increasing **6,428%** over the last two years

UPMC delivers healthcare content beyond email to provide timely updates based on subscriber interests

HealthBeats

COVID

Heart Health



Launched MMS over the summer to drive higher engagement rates

# Salesforce Preference Center

Launched updated preference center in late 2020, which provides easy opt-in and opt-out access to all newsletters and email communications, as well as houses profile information including name, zip code, and preferred hospital



Generates **incremental newsletter subscriptions**, providing more content preferences for email and personalization opportunities



Launched a profile pop-up to encourage visitors to submit their name and zip code to **expand their profile** and identify their region for **more relevant content**



## Top Subscriptions

HealthBeat

Family Health

Women's HealthBeats

Brain Health

# Delivering Consumer Journeys Through Content

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Preference Center houses over 100 different newsletters, providing customized health and wellness content to interested consumers

- Newsletter cadence varies from weekly to quarterly based on curation of content and engagement of audiences



Subscribers are generated through multiple tactics, including service line and brand campaigns, blog promotion, website visits, and blog visits

- Additional subscriptions driven through preference center and interactive emails
- Content preferences and subscription entry source drives personalized journeys

The screenshot displays the UPMC HealthBeat website interface. At the top, there's a search bar and a navigation menu. The main content area features a large article titled "The COVID-19 Vaccine in Young Kids: What to Know" with a sub-headline "Children as young as 6 months old can now receive the COVID-19 vaccine. Learn more about the vaccine's safety and effectiveness from UPMC." Below this, there's an "Editor's Pick" section with various topics like "LGBTQIA+ Youth Support" and "Rebound Headaches". A "Never Miss a Beat" section encourages subscribing to the HealthBeat newsletter. The "Content for You" section highlights articles such as "HEART AND VASCULAR HEALTH: Why Does My Heart Race at Night?", "ORTHOPAEDICS: What is Shoulder? How is It Treated?", "FAMILY HEALTH: Ouch! Why Does My Arm Hurt After a Shot?", and "REHABILITATION: An Introduction to Management". On the right side, there's a "Sports Medicine Orthopaedic Care" section with a "Contact Us to Schedule an Appointment" form and a "Subscribe to the Orthopaedic Care Newsletter" button at the bottom.



# Regional Content Strategy

Launched regional content strategy in early 2022 to deliver localized content across the UPMC footprint. Newsletters segmented by regions and currently working to layer in dynamic content per sub-region



Generate subscribers through regional promotion across paid and organic channels, as well as campaign opt-in for relevant markets



Performance is consistently above benchmark, emphasizing the value that regional content provides to our audiences



UPMC offers world-class care — close to home. Our bimonthly newsletter connects you to the latest services, providers, locations, and technologies at UPMC Western Maryland. For more information on services we offer in your community, [visit our website](#).



**Nationally Ranked Pediatric Specialty**

Research, analysis, and details: UPMC Children's



UPMC brings world-class care close to home. Our bimonthly email connects you to the latest news about services, providers, locations, and technologies in west central Pennsylvania — focused on the expert specialty care UPMC provides in Blair, Bedford, Cambria, Huntingdon, and Somerset counties.



**UPMC Walk-in Centers Offer Convenient Care for Illness or Injury**

With walk-in center locations in both Altoona and Bedford



# Generating Engagement and Optimization through Interaction Studio

Interaction Studio enhances the power of Marketing Cloud with expanded real-time personalization.

Identify the lifecycle stage based on content engagement (awareness, interest, consideration, conversion) in order to align messaging, with the goal to increase loyalty, engagement, and conversions

- Pre-work of defining stages and activity extremely important

Deploy cross-channel personalization across website, email, direct mail, and paid channels


- Ability to customize on a one to one basis based on activity with opted-in subscribers

Deliver more relevant experiences during moments of interaction across the customer journey

- Results inform future personalization efforts to drive both engagement and conversions



# Generating Engagement and Optimization through Interaction Studio



Interaction Studio enhances the power of Marketing Cloud with expanded real-time personalization.

Leveraging opted-in first party data strengthens the ability to deliver relevant messages to both opted-in and non opted-in consumers.

Deploy one click subscribe option for previously opted-in users to expand newsletter subscriptions

Adjust messaging to in-line sign-up based on opt-in status to generate additional subscribers

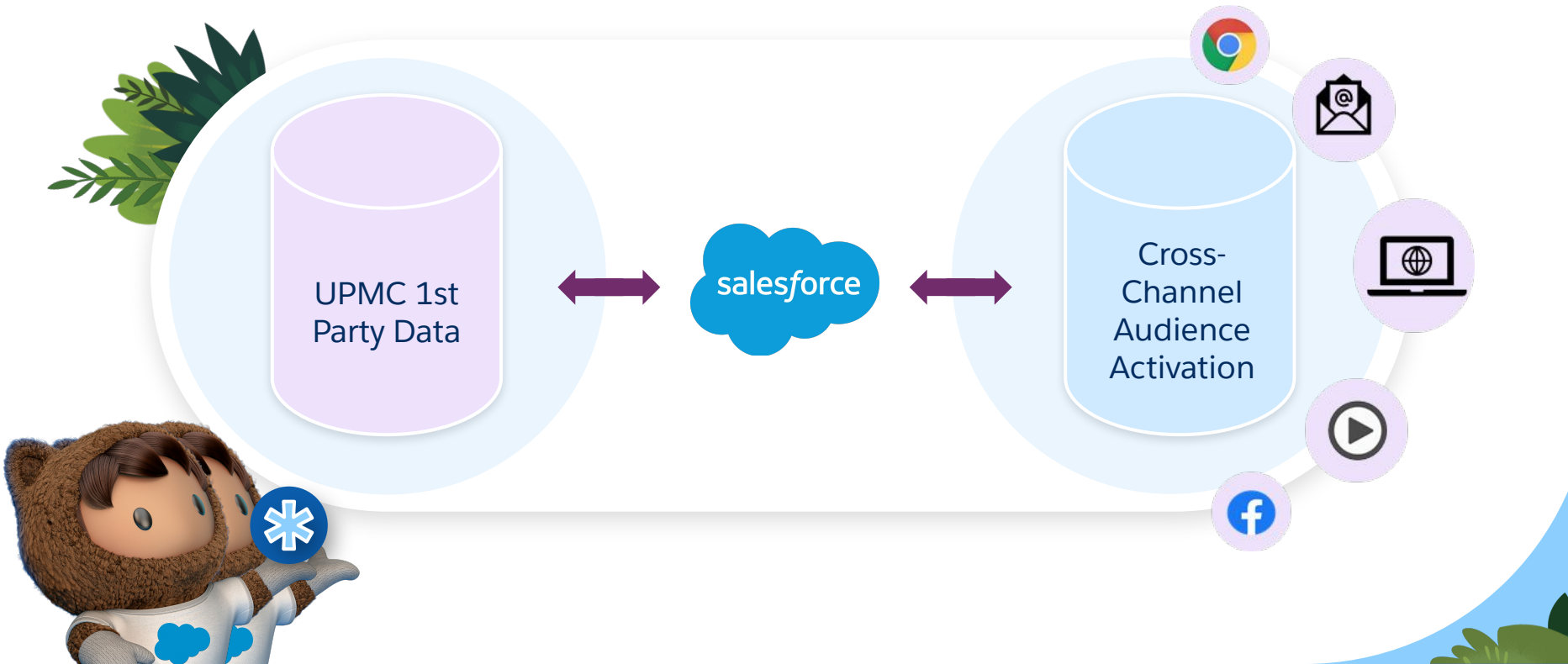
Customize messaging based on audience segment or content preferences

Trigger new messages (email, paid, website) based on content engagement





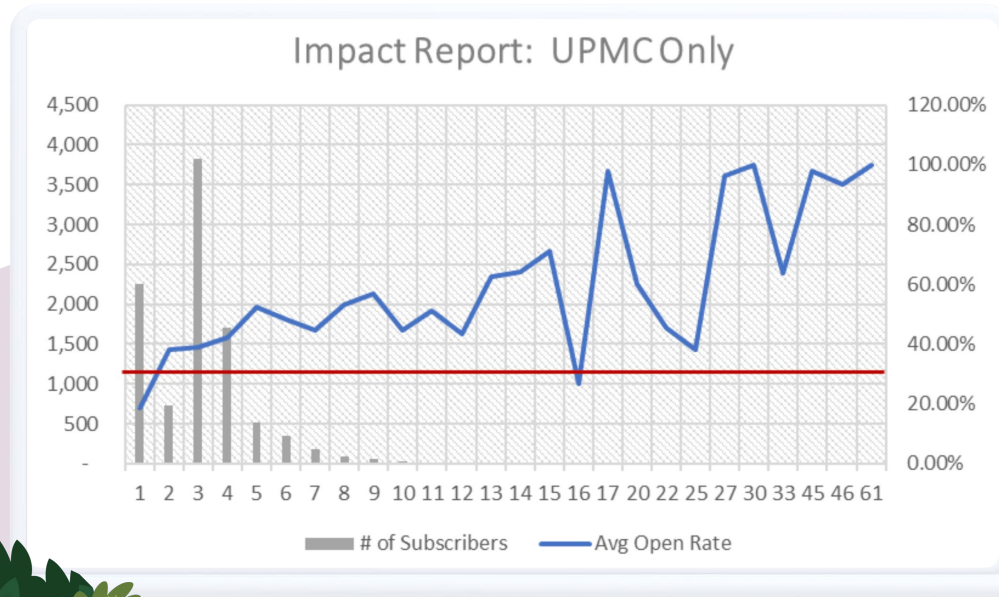
# Salesforce Marketing Cloud: At the Center of Our Digital Marketing



# Using Data To Make Strategic Communication Decisions

Subscribers who received **one** email this month had the **lowest open rate**, while those who received **2-5+** emails all generated **open rates above benchmark**, indicating that we see more engagement both with additional newsletter subscriptions and open rates the more consumers subscribe

*This report illustrates Open Rates compared to the number of subscribers in a respective email group.*



# Delivering Measurable Results

Our audience-first strategy has delivered strong results, which continue to improve through constant test and learn optimization.

*Measurement varies by goal, but includes database growth and loyalty, crafting relevant audiences for campaign initiatives, and increasing our paid media performance and efficiencies.*

**120+**

**Audience Activations Implemented**

**198%**

**Increase YoY in unique visitors to the preference center**

*Visitors opted-in to 50% more additional newsletters*

**40%**

**Conversion Rate on Preference Center Profile Pop-Up**

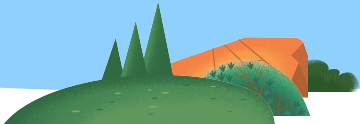
**132%**

**Higher Open Rates on Engagement Journey Emails**

*Compared to Benchmarks*



# Q & A



Thank You



# Learn More

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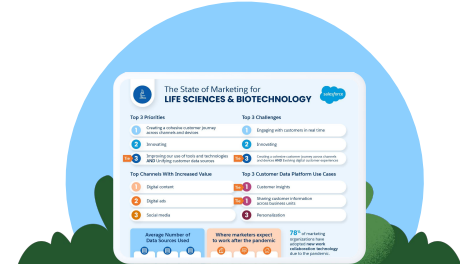
## Explore the data

[Download the Healthcare Datasheet](#)



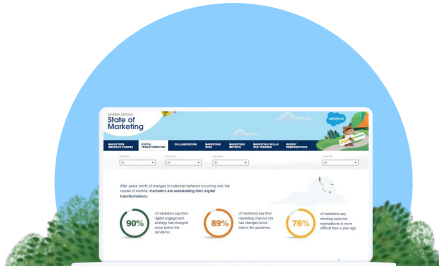
## Explore the Healthcare and Life Sciences Resource Center

[Innovations in Healthcare & Life Sciences](#)



## Explore the data

[Download the Life Sciences & Biotech Datasheets](#)



## Explore the data

[sforce.co/SOM7tableau](https://sforce.co/SOM7tableau)



## State of Marketing Report

[sforce.co/SOM7report](https://sforce.co/SOM7report)



## Read the blog

[sforce.co/SOM7blog](https://sforce.co/SOM7blog)