Campaign Considerations

When creating Campaigns for large-scale patient outreach, remember to keep the following considerations in mind.

1

WHO CAN RECEIVE CAMPAIGNS?

Campaigns can be sent to any patient that exists within your Artera Enterprise and is not limited to the patients present in your Practice.

Campaigns can also be sent to Unverified Patients (but not those manually added). Click here to learn more.

2

WHO CAN CREATE & SEND CAMPAIGNS?

Campaigns can be sent out by the User Type indicated on the Permissions page under Enterprise Settings.

This means that Enterprise Users can choose to restrict Campaigns by User Type. Click here to learn more.

3

WHICH PRACTICE(S) WILL BE SENDING CAMPAIGNS?

Are each of your Artera Practices expected to use Campaigns for their own use cases and patient communication needs?

Will all Campaigns be sent from a Campaign-specific Practice (AKA Shell Practice)?

4

ARE USERS EXPECTED TO RESPOND TO INBOUND PATIENT MESSAGES?

Will users reply to inbound patient responses from the Campaign?

If so, it is important to ensure that the Campaign is being sent at a rate that makes it manageable for users to handle inbound messages without being overwhelmed.

5

WHERE WILL CAMPAIGN MESSAGE TEMPLATES BE STORED?

As teams leverage Campaigns and repurpose certain messages, where will your Campaign message templates be saved? Will they be saved in an internal shared drive that users can easily access? Is each team responsible for saving their own message templates in an internal folder?

Connect with your Customer Success Representative for additional information.