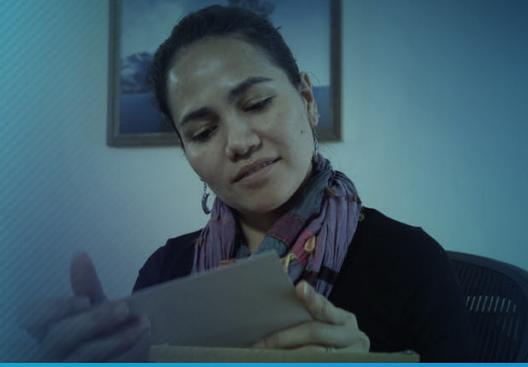


## Bridging the Gap from Digital Outreach to Human Engagement

with Medtronic Vital Sync™



Medtronic Manager of Global Marketing Operations Todd McMurtrey is no stranger to the power of direct mail. An early adopter to TMA®, he had plenty of experience using the tool and understood its value when it came to being able to personalize, scale and track direct-mail marketing efforts. This time around, he was working with a new Medtronic product, the Vital Sync™ Health Informatics and Monitoring solution, and was faced with a new set of challenges. He found that his new obstacles needed new ways of working with TMA, and in this case as a part of a greater combination of omnichannel marketing tactics, to help create the new solutions he needed.

89%

89% response rate from each kit sent.



Exceeded all revenue contribution goals by over 180%.

50%

50% kit-to opportunity conversion rate.

Amazing results from his automated incontinence sampling program drove him to expand his use of Tactile Marketing Automation (TMA) to support his go-to-market strategy for a new product, the Vital Sync™ Health Informatics and Monitoring solution. Since purchase decisions for a solution like Vital Sync™ were handled by large hospital committees, Todd knew it was critical for his reps to have an easy way to build relationships of trust with a variety of personas. He solved this problem by creating a scoring engine and campaigns in Oracle Eloqua that personalized communications based off of prospect interests and intent, rather than title and role. Prospects received highly relevant and well-timed communications - with a physical send being the kicker for making outreach feel more like a conversation. This personalized cross-channel experience drove an 89% response rate from each kit sent, and an almost 50% kit-to-opportunity conversion rate.

### CHALLENGES

McMurtrey had a new, high-tech product to bring to market. As with any new product, this required reaching new audiences, and reaching existing audiences with a new approach. Moreover, the product was being presented to large purchasing-decision committees who oversee hospital purchasing decisions. Their roles are unclear in terms of their purchasing power, and their titles do not often give insight into their actual role in the buying cycle.

This made it challenging to appropriately target messages based on title and role, so he needed a better way.

To help solve this problem, McMurtrey and his team took a clue from Harry Potter and tackled their challenges with a unique engagement scoring model they affectionately labeled, "The Sorting Hat," and incorporated TMA into its magical mix.

## THE SORTING HAT

The Sorting Hat took campaign contacts and put them into groups based on their intrinsic qualities: their interests and intent. As contacts entered the campaign, they ran through filters and rules to identify which messages and stories were of most use to each individual contact. From there, the Sorting Hat continued to message, adapt and filter communication to the prospects as they moved through their journeys with different digital and physical touch points.

Rather than segmenting a prospect by title or role, the Sorting Hat was able to determine a contact's interest and intent, in order to better match messages to the individual. The question became "What do they want to know about this product?" rather than "What do we want to tell them?"

In one experiment, McMurtrey showed that using a traditional role/title based approach, their message would have been mismatched about 42% - 48% of the time.

By speaking to the right contacts in the right way, the team was able to greatly improve their marketing ROI. The campaign also solved:

- **Message targeting:** Identifying which type of messaging resonated with which contact, at scale.
- **Velocity:** A smarter program knows when to move someone forward when they are truly ready.
- **Noise reduction:** Support to sales in identifying the right people and accounts who are ready to move forward, rather than the "noise" of casual interest.
- **CX / UX:** Building a best-in-class digital experience that covers all stages of the purchase funnel.

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## TMA AND THE SORTING HAT

As a lead moved through the Sorting Hat's funnel, they would be presented with a series of outreach tactics, sourced from different tech solutions. Once a contact got to a certain engagement score, TMA would come into play and one of three versions of a resource kit would be triggered to be sent to the lead. The kit comprised personalized, dynamic print educational materials about Vital Sync.

By integrating PFL's TMA solution into Eloqua, they were able to match the message, timing, and follow-up to the individual. Once a contact received the kit, the program sent a personalized email to follow up from their assigned rep. This helped initiate a natural conversation, rather than requiring a form or other barrier before things could proceed.

"TMA helped us avoid the clumsy step in digital outreach that asks someone to fill out a form," McMurtrey said.



“Building a relationship of trust is really hard through an email.”

— Marketing Operation Manager,  
Todd McMurtrey

"Building a relationship of trust is really hard through an email. Adding TMA to our strategy enabled us to skip a clumsy lead form and instead feels more like a conversation. For us, TMA is the bridge between identifying someone who is digitally engaged to having an actual conversation between them and a rep - in our case, that means the difference between consuming content online and actually booking a demo. And it all happens much more naturally and in greater volume."

## THE RESULTS

The Sorting Hat campaigns produced excellent upstream performance metrics — unique open rates and unique open-to-click rates in the 30% - 45% range.

However, the key for the team was how tactile elements were able to convert these digitally engaged customers into actual conversations with a salesperson, and ultimately into qualified opportunities. In total, the initial phase of this program had an 89% response rate from each kit sent — meaning that the recipient actually wrote an email back — and an almost 50% kit-to-opportunity conversion rate.

By adding TMA as a part of the outreach, Medtronic was able to achieve an ambitious annual opportunity goal in only seven months, and it ultimately exceeded all revenue contribution goals by over 180%. Moreover, it was extremely easy for McMurtrey and his team to execute, and required little additional cost or collateral to build. They were able to use what they already had, personalize it, send it at the right time and use it in the right process to boost results.

“Adding TMA to our campaign allowed us to create real conversations and develop real relationships, which opened up doors like never before. TMA allowed us to leverage our targeting and personalization through new channels, and had an extremely high return. It has become the defacto standard in campaigns for accelerating and converting engagement.”

— Todd McMurtrey, Marketing  
Operation Manager



## ABOUT PFL

Tactile Marketing Automation® (TMA®) complements your digital marketing with tangible mail that engages prospects and customers. Send anything you can imagine, from postcards and brochures to complex kits with large dimensional components, by integrating TMA directly with your marketing automation platform. Get noticed and drive results with TMA.