

First Insight Corporation: 20/20 e-Marketing Vision

In many ways, First Insight Corporation of Hillsboro, Oregon does for eye care medical professionals what Act-On does for small- and mediumsized business marketers. The company enables ophthalmologists, optometrists, and opticians to automate the business and patient care elements of their practices. First Insight helps eye care professionals stay current with the latest developments in patient record keeping and conformance with medical standards and practices. It also enables them to deliver efficient and personal customer service that patients have come to expect from first-class businesses and top-notch professional organizations.

Founded in 1994, First Insight has grown to 100 employees and is recognized as the leader in eye care practice management and electronic health records business solutions. First Insight has first-hand experience with what works and what doesn't in making small- and medium-sized businesses successful in their respective fields. Accordingly, First Insight demands highly effective, high-touch e-marketing programs – without the expense, complexity, and headcount requirements of traditional tools.



Company Profile:

Provides eye care professionals with innovative, solution-focused products and services that enhance the quality of patient care, improve office efficiency and staff productivity, reduce operating costs, and increase revenue by helping practices create a flexible, comprehensive paperless office system.

Customer Since: 2010

It's About Care

First Insight wasn't a first-time user of marketing technology; the company became an Act-On customer after years of using email marketing tools. Given the needs and constraints imposed by such tools, the company decided that an integrated marketing platform was the only way to scale up.

First Insight wanted more than its email vendor could deliver. The major problems were:

- No web visitor tracking data
- No web form customization
- Not user-friendly
- Overall bounce rate was too high

Business Impact

First Insight first considered Act-On's integrated marketing platform based on positive buzz it heard in the local business community. Since integrating Act-On into its marketing programs, First Insight reports dramatic improvements in marketing process efficiency and bottom line results.

Reduced Time to Action

Act-On has reduced the time it takes for First Insight's marketing team to get critical tasks done:

- Cut time to launch an e-marketing campaign from four-five days to just one day
- Cut time to create and send the company newsletter to a few hours

And First Insight can now create and send fast-track emails to a targeted list of prospects and customers on an as-needed basis.

"I've often had to create and deploy an email campaign within a few hours," explains Donna Lehmann, director of marketing communications for First Insight, "with Act-On, this is now

possible. And if we want to import an HTML email that was our web team created, it's done easily with just a few clicks."

Improved Quality of Marketing Touch

Seamless integration with Salesforce provides highly targeted follow-up for marketing campaigns, starting from lead inception to long-term sales and customer relationship management. Act-On enables fully automated drip marketing campaigns, even including personalized thank you notes to leads and customers. Donna said, "Our next project is to take marketing up a notch by incorporating drip marketing for our highscoring leads. In addition, our sales team loves the ability to easily send an email from Salesforce using predefined corporate templates that marketing has created for them in Act-On. And our sales team can easily track web activity with the Act-On integration, all without leaving Salesforce."



Staff productivity has increased – we are able to prepare emails, e-newsletters, landing pages, forms, and other e-communications without having to know HTML coding.



DONNA LEHMANN

Director, Marketing Communications
First Insight Corporation

Rich Metrics and Tracking

Act-On enables real-time tracking of lead activities on the First Insight website, including which pages a prospect is visiting, collateral and white papers downloaded, etc. Act-On also creates automated summaries of lead behavior for forwarding to sales people for targeted follow-up based on lead behavior and customer interests.

“Before First Insight began using Act-On, it was difficult to measure the effectiveness of our e-marketing campaigns and website activity.” Says Donna. “Now, with Act-On we can track, analyze, and act on the data that we’ve gathered based on the scoring and activity of our leads and current customers in our database.”

In addition, Donna appreciates the fast, easy access to campaign metrics that lets her evaluate campaign effectiveness and make mid-course corrections to the current campaign or lessons learned for the next rounds.

Quality of Support

Act-On prides itself as a “Customer First” company. Each customer receives a dedicated Success Manager to insure a successful and fast implementation.

“Act-On provides a level of service and training that is far better than any vendor I’ve worked with in the past,” said Donna. “Everyone at Act-On is highly professional, friendly, and knowledgeable, and there when I need them. This attribute is extremely important to our company as we value

high-quality customer support as a key component for every successful company.”

Summary

Summing up, the results First Insight has achieved are impressive. Considering the value of time to today’s marketing organization, Act-On has driven significant productivity improvements. And as for results, the numbers speak for themselves:

- 50 percent increase in sales
- 100 percent increase in response rate for inside sales campaigns
- The first orchestrated inside sales campaign using Act-On outperformed nine years of previous campaigns
- Reduction of action and project cycle times – from four or five days, to hours

About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

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