

Case Study:

How one financial services company increased wellness center utilization through data segmentation and personalized marketing

Connecting members to care isn't just about access — it's about **understanding what motivates them to engage**. This belief guided one large financial services company and Premise Health to team up and create a bold, data-driven, strategic marketing pilot. Premise's deep expertise in data, personalization, and human-centered messaging helped the organization drive measurable engagement at their onsite wellness center.



Goal of the Pilot

Identify, test, and refine member outreach strategies, focusing on personalized, data-informed methods that maximize engagement.

The Approach

- > Segmented the company's team member population using member and third-party data
- > Developed tailored personas and messaging frameworks
- > Drove engagement with key types of care

About the Company

A Detroit-based financial services company, involved in industries such as mortgages, fintech, real estate, and automotive, sought to boost member engagement at its onsite wellness center. The organization is known for its innovative approach across diverse business sectors. The employer, voted one of Fortune's Best Companies to Work For, has thousands of team members all throughout the U.S. Their wellness center is currently available to team members in Michigan.

The Vision

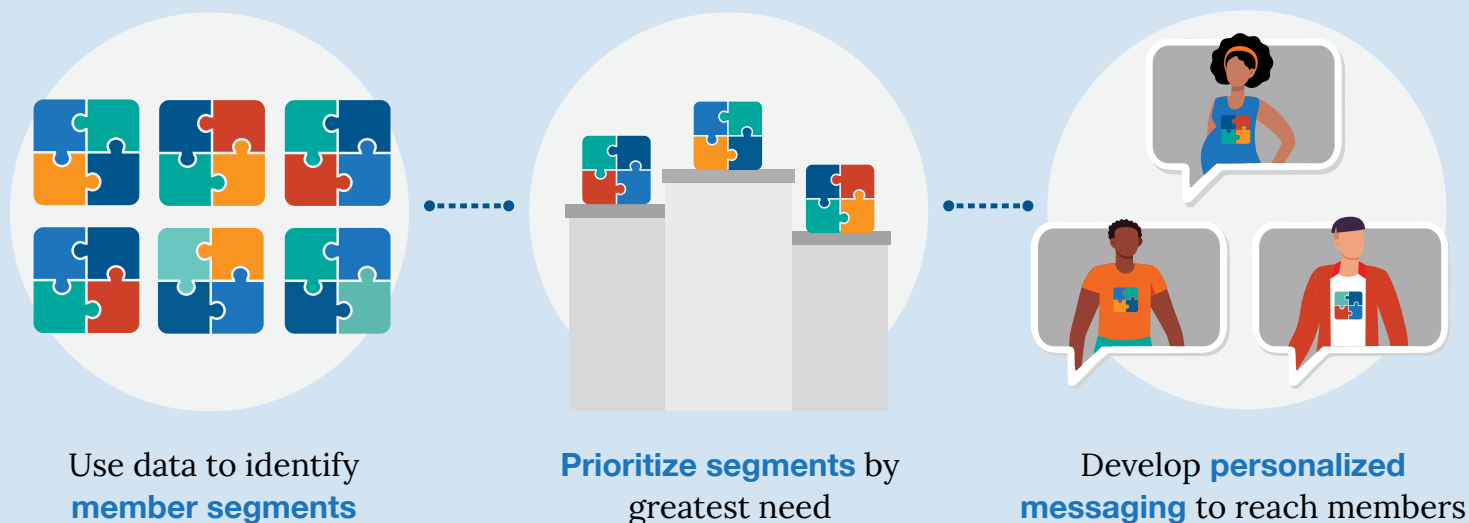
The company saw an opportunity to bring more people into their onsite wellness center. Recognizing that opportunity as a chance to increase engagement and utilization by better understanding the employer's team members, Premise proactively approached the company to collaborate on a data-informed targeted marketing campaign. Together, they aimed to reach all team members — whether frequent visitors, lapsed users, or those new to the wellness center — **with tailored messaging.**



The Solution

The Premise member marketing team first analyzed the company's member data to identify segments. These segments, or groups, were based on shared behaviors, demographics, and wellness center utilization patterns. The team then developed four member personas, one for each segment, based on quantitative surveys and qualitative interviews. These personas informed the key messages sent to members to drive engagement at the wellness center. Messaging and engagement strategies were tailored to each persona and carried out through a test-and-learn approach, helping uncover insights to inform future campaigns for the company and broader Premise member marketing efforts.

Meeting Members Where They Are



Marketing Pilot Details

Campaign Duration
February 11 – May 16, 2025

Services Promoted
Physical therapy, chiropractic care, behavioral health, virtual care

Marketing Channels
Email, direct mail, campaign landing page, pharmacy bag inserts

Key Terms

1

segment

a data-defined group of team members who share behaviors, demographics, and healthcare utilization patterns

2

persona

a humanized profile within a segment. Personas are fictional and represent a typical individual within a specific segment

3

pre-engaged

eligible members who are not yet using the onsite wellness center but have the potential to be engaged through outreach and education

Key Personas

Personas were developed based on findings from a team member quantitative survey and one-on-one qualitative interviews.



Proactive Planner

Frequent users of primary care and musculoskeletal services



Integrated Care Seeker

Users with chronic conditions



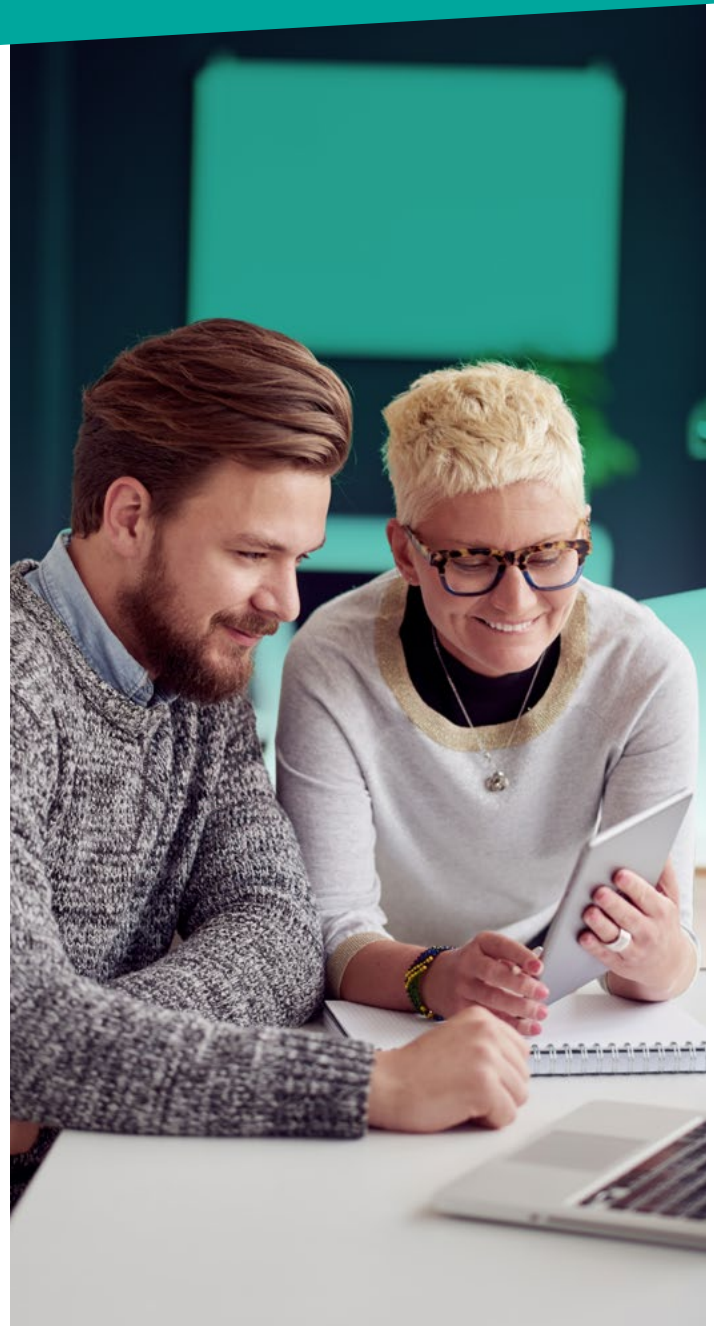
New Day My Way

Previous users that hadn't been into the onsite wellness center in ~18 months



Relationship Loyalist

Members who had never visited the onsite wellness center but are community healthcare users



The Outcome

Over three months, the pilot marketing campaign drove increased engagement at the onsite wellness center and validated team member receptiveness to Premise communications. The campaign:

Generated a significant volume of visits — both scheduled and completed — demonstrating a direct impact on care utilization

Achieved exceptionally high engagement, with 90–94% of the audience opening at least one email — more than double the typical industry averages of 30–40%

Maintained strong audience retention, with only two opt-outs among more than 2,400 members

Drove a 73% engagement rate on the campaign landing page, which featured wellness center information and was promoted in many of the marketing emails

Turning Engagement Into Action

The data-driven campaign highlighted the importance of continued segmentation, personalization, message testing, and channel optimization when it comes to boosting engagement and supporting healthcare utilization via a marketing campaign. Most importantly, it helped connect hundreds of members to care — **turning engagement into action and making a meaningful difference in their health journey.**



Awareness

2,420 unique team members
4,840 total emails sent
4,734 emails delivered (98%)
2,420 direct mailers sent



Interest

2,507 emails opened



Consideration

2,396 logins to patient portal



Intent

275 appointments scheduled



Conversion

103 appointments completed

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need, and how we can help.

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