



CRM & Digital Metric Report

02.05.2026(2025 Analysis)



Agenda

- Marketing Dashboard
- Biggest Wins
- Opportunities
- Marketing Metrics
 - [Digital Metrics Dashboard - Power BI](#)

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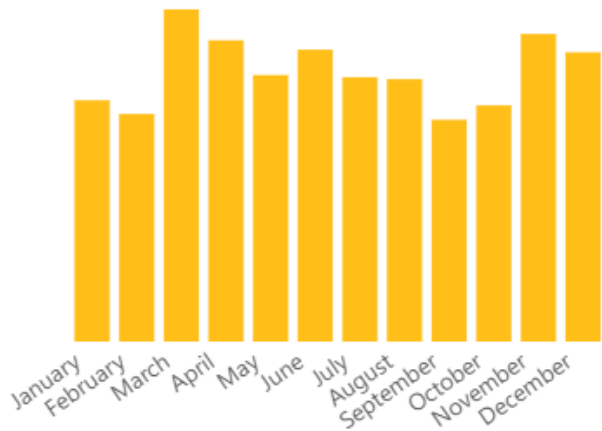
2025 Scorecard Metrics



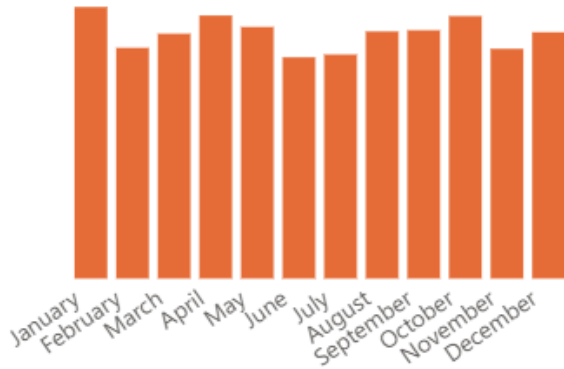
1/1/2025

12/1/2025

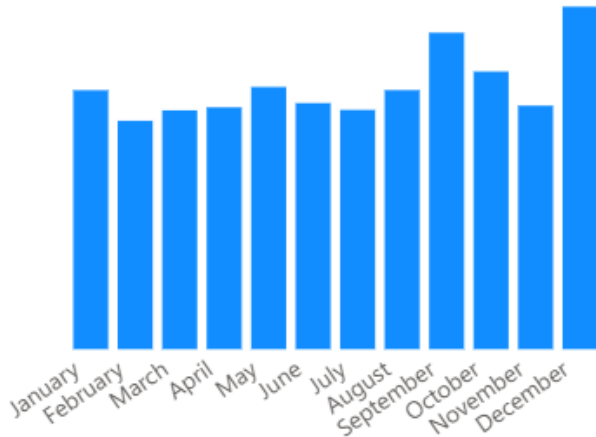
Awareness



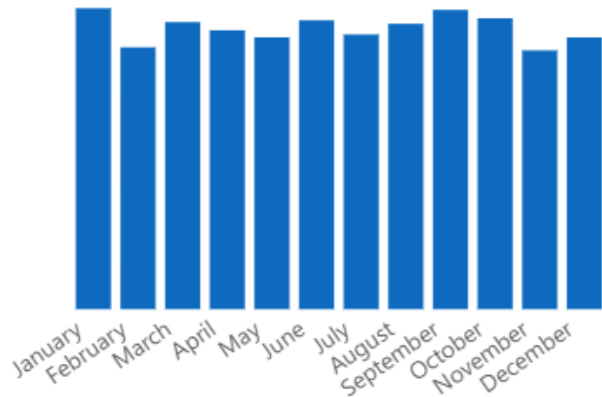
Engagement



Leads



Conversions



Total Impressions: The total number times people are seeing Summa across the marketing channels we use.

Total Engagements: Showcases how many people are engaging with the content or marketing we are sharing through these channels.

Total Leads: The number of marketing leads (i.e. calls, form submittals, etc. we are driving through marketing channels.

Total Appointments: The number of appointments scheduled that came through marketing channels



Total Impressions

Total Engagements

Total Leads

Total conversions



Cost Analysis/Spend



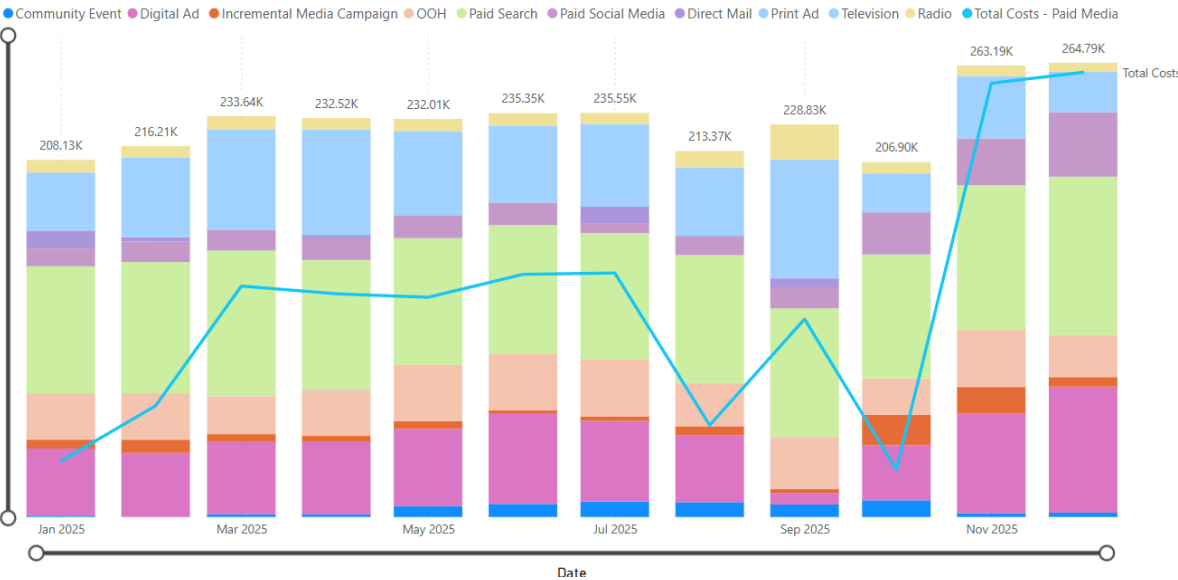
Total Spend

Date	Community Event	Digital Ad	Incremental Media Campaign	OOH	Direct Mail	Radio	Television	Print Ad	Paid Search-Google Ad	Paid Social Media	Total Costs - Paid Media
2025-12	2,500.00	73475	5,551.29	24632	0.00	5269	23553	0	92218	37589	\$264,787.38
2025-11	2,108.33	58248	15,390.66	33547	0.00	6243	36347	0	84041	27264	\$263,188.83
2025-06	7,608.50	52942	1,665.93	33041	287.07	7243	44229	575	74888	12869	\$235,348.06
2025-07	8,994.08	46992	2,668.98	33041	9,934.95	6416	48254	0	73894	5351	\$235,546.09
2025-05	6,305.67	45130	4,417.92	32906	268.23	7090	48957	0	73775	13159	\$232,009.01
2025-04	1,500.00	42260	3,550.18	26906	1,969.51	6695	60849	575	75630	12583	\$232,518.12
2025-03	1,574.83	42201	4,535.53	22049	238.25	7879	58282	0	84968	11916	\$233,643.87
2025-01	769.83	39169	5,172.61	27041	10,426.43	7361	30871	3000	73973	10348	\$208,131.80
2025-08	8,636.50	39113	5,170.97	25301	461.53	9650	39857	0	74474	10705	\$213,369.16
2025-02	0.00	37305	7,601.04	33041	2,461.85	5537	45040	575	75448	11040	\$216,200.03

Cost Analysis

Date	Impressions	CPI	Engagements	CPE	Leads	CPL	Conversions	CPC
2025-03	30152357	\$0.008	1308777	\$0.179	44913	5.20	19,278.00	\$12.12
2025-04	27333180	\$0.009	1405946	\$0.165	45473	5.11	18,731.00	\$12.41
2025-05	24185626	\$0.010	1344782	\$0.173	49304	4.71	18,260.00	\$12.71
2025-06	26492828	\$0.009	1182530	\$0.199	46278	5.09	19,398.00	\$12.13
2025-07	23994614	\$0.010	1197440	\$0.197	45002	5.23	18,448.00	\$12.77

Paid Media Spend



Biggest Wins

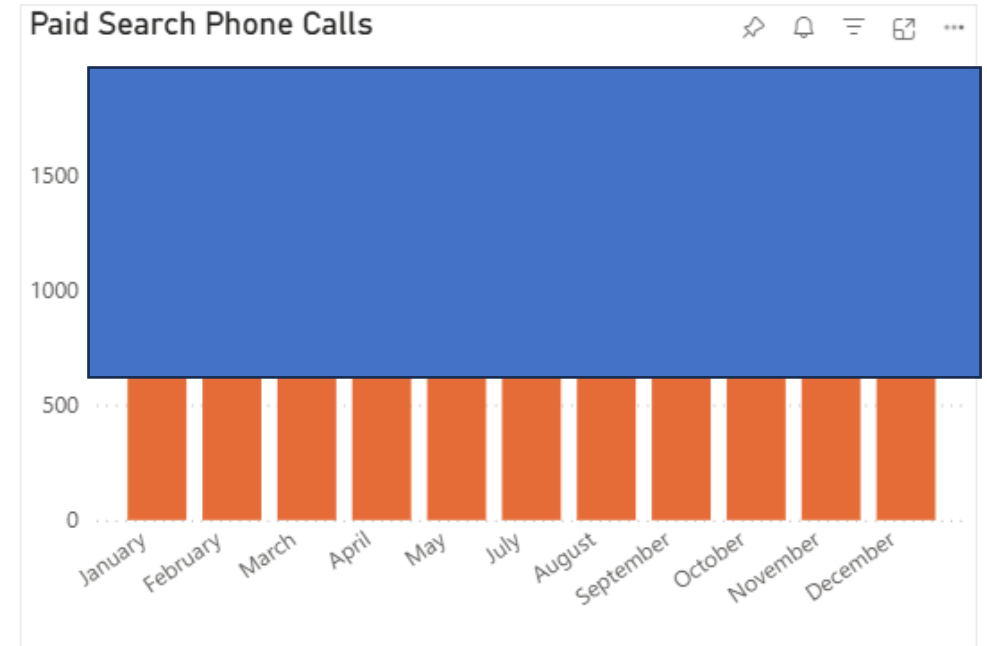
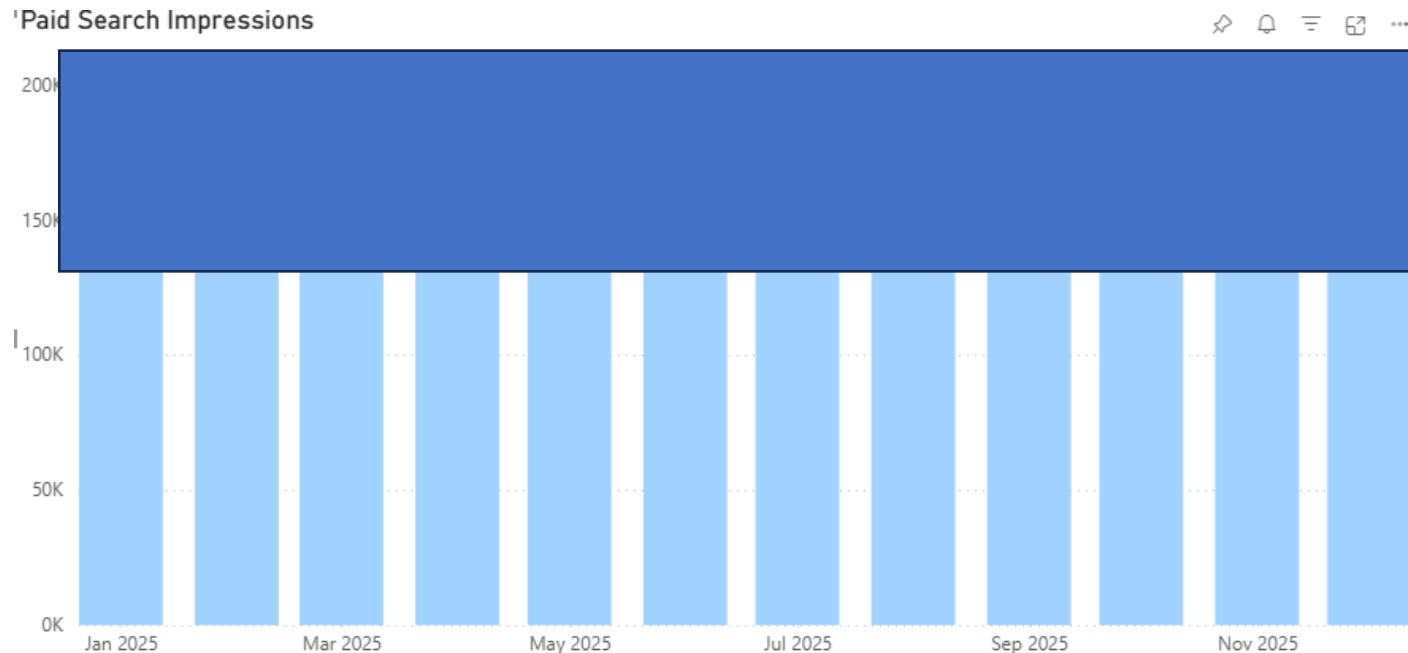


Paid Search

We adjusted our strategy in 2025 to allocate more budget towards key service lines, and less (-60%) towards brand:

2024 vs. 2025 Call Appointments

Urology +45%
Ortho +79%
Neuro +145%
Cancer +249%



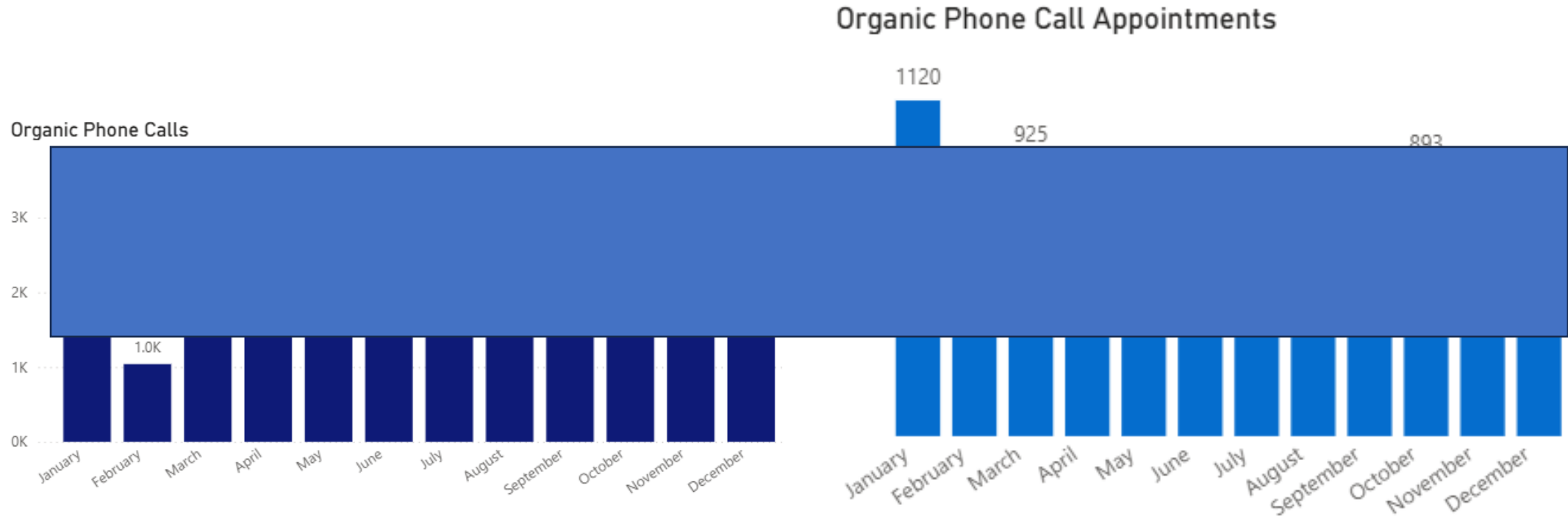
Issues with call attribution in Call Rail contributed to a lower number of reported paid search calls in May

Organic Phone Calls

2024 vs 2025

+36% organic phone calls

+22% organic phone call appointments



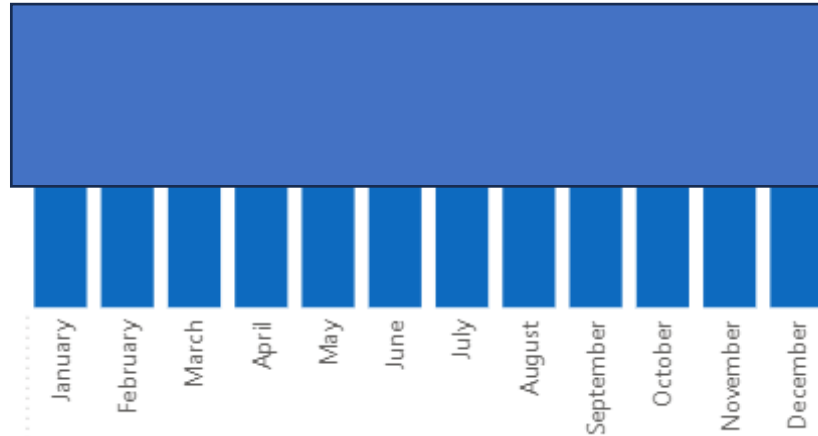
We made the change in early 2025 to shift paid search budget away from brand, and more towards key service lines. This resulted in more organic phone calls and appointments.

*Call attribution issues March-May due to Call Rail implementation

Email Wins

+75% increase in eVitality subscribers from 2024 to 2025

Email Subscribers



Email subscribers increased September-November from an activation of previously unverified users. List cleanup in December resulted in a decrease of subscribers (removing bounces, invalids, etc).

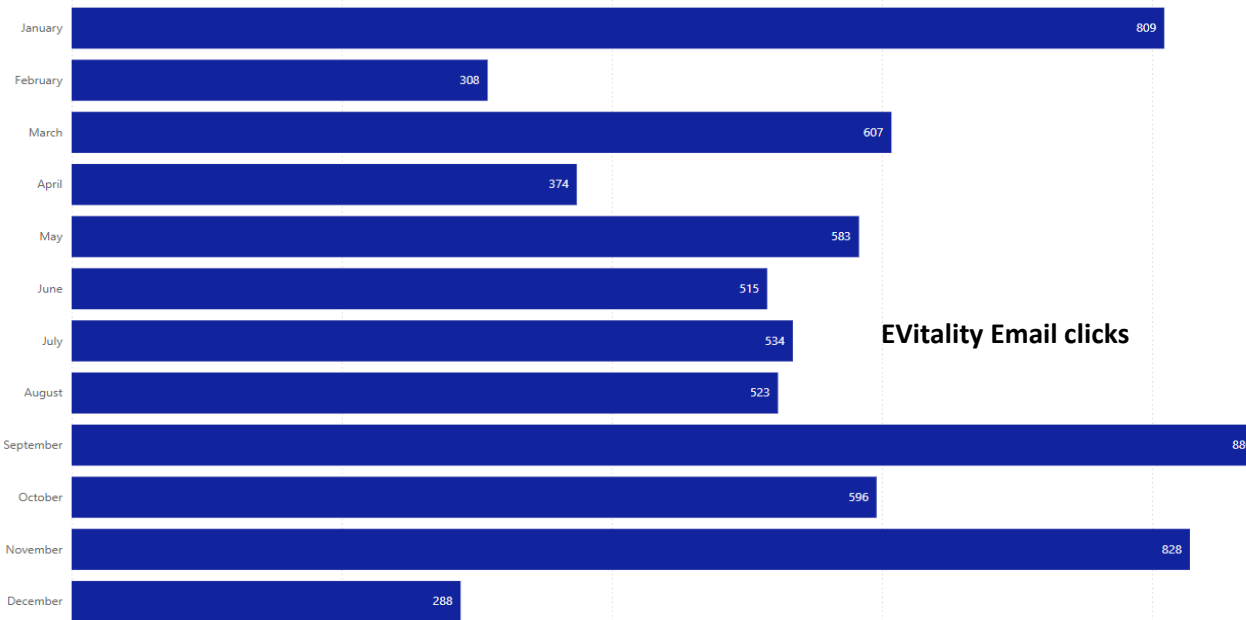
Highest engagement email topics:

- January – Cervical Cancer Awareness
- September – Senior Health
- November – Lung Health

Lowest engagement email topics:

- February – Heart Month
- April – Minority Health Month
- December – Winter Wellness

eVitality Email clicks



Paid Social Wins

Impressions



Jan Feb Mar Apr May June July Aug Sep Oct Nov Dec

■ 2024 ■ 2025

Engagements



Jan Feb Mar Apr May June July Aug Sep Oct Nov Dec

■ 2024 ■ 2025

Leads



Jan Feb Mar Apr May June July Aug Sep Oct Nov Dec

■ 2024 ■ 2025

Conversions



Jan Feb Mar Apr May June July Aug Sep Oct Nov Dec

■ 2024 ■ 2025

2025 Spend



0 Jan Feb Mar Apr May June July Aug Sep Oct Nov Dec

Impressions increased by 66.35%

Engagements increased by 588.2%

Leads increased by 313.5%

Conversions increased by 546.67%

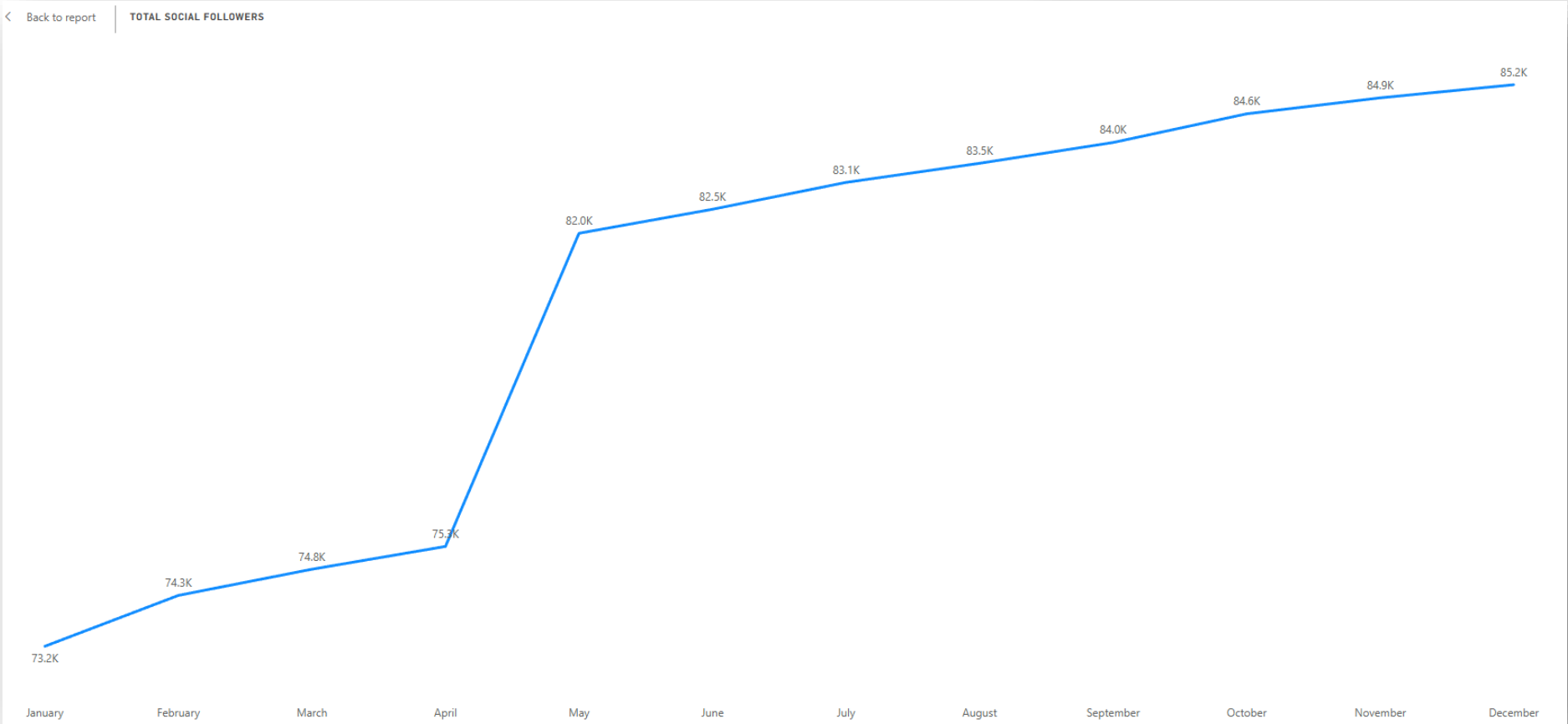
Wins: In October, November and December, we spent the most, almost double what we typically spend which increase the amount of Impressions, Engagements and leads. Conversions in June spiked due to pride and October due to 8 appointments from Mammograms, 3 Appointments in pelvic health, 4 appointments in pulmonary and 4 in heart.

Organic Social Followers Wins

Social Media Followers

85K

Total Followers



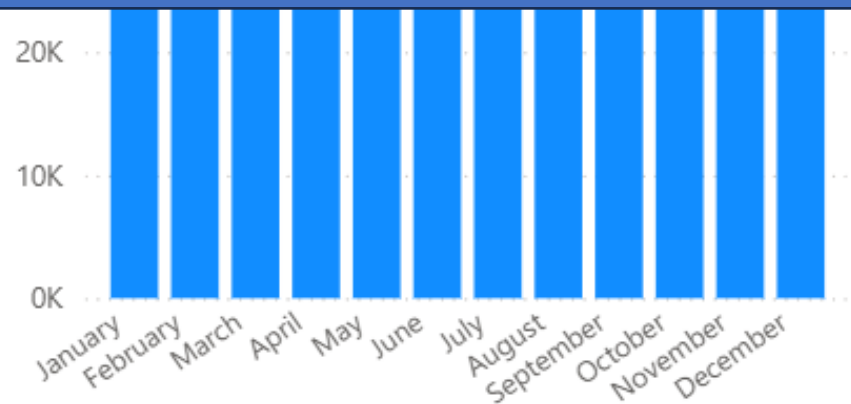
Wins: The spike is attributed to Summa Health reactivating our X platform. Though Summa Health continues to consistently grow in followers. **Summa Health followers increased by 17.82% in 2025**

Local Listings Wins (2025)

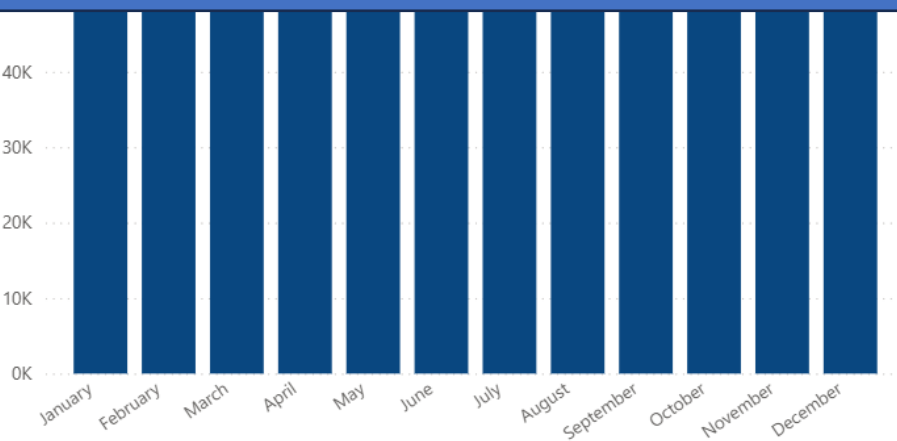
Key Takeaways:

- Location local listings remain a consistent driver of actions throughout 2025, with strongest performance in late summer/early fall.
- Unexpected dip in calls in November. Perhaps related to the HATCo announcement/transition?

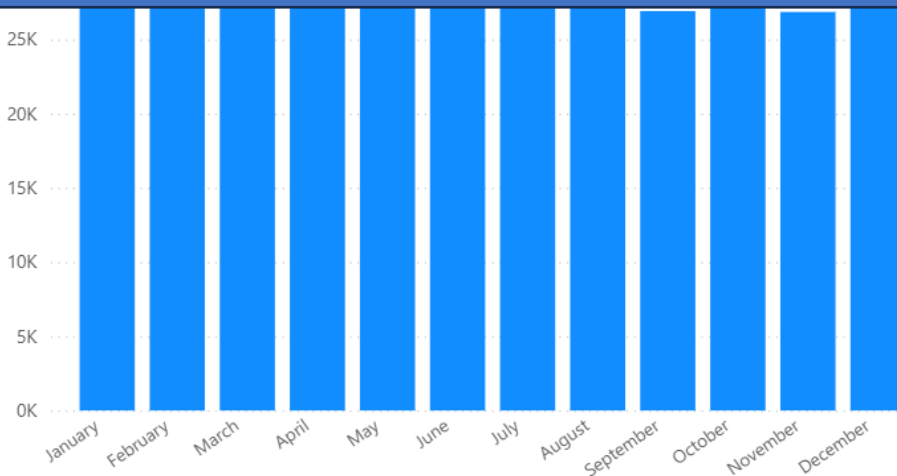
Local Listing Calls



Local Listing Clicks Location- Profile actions

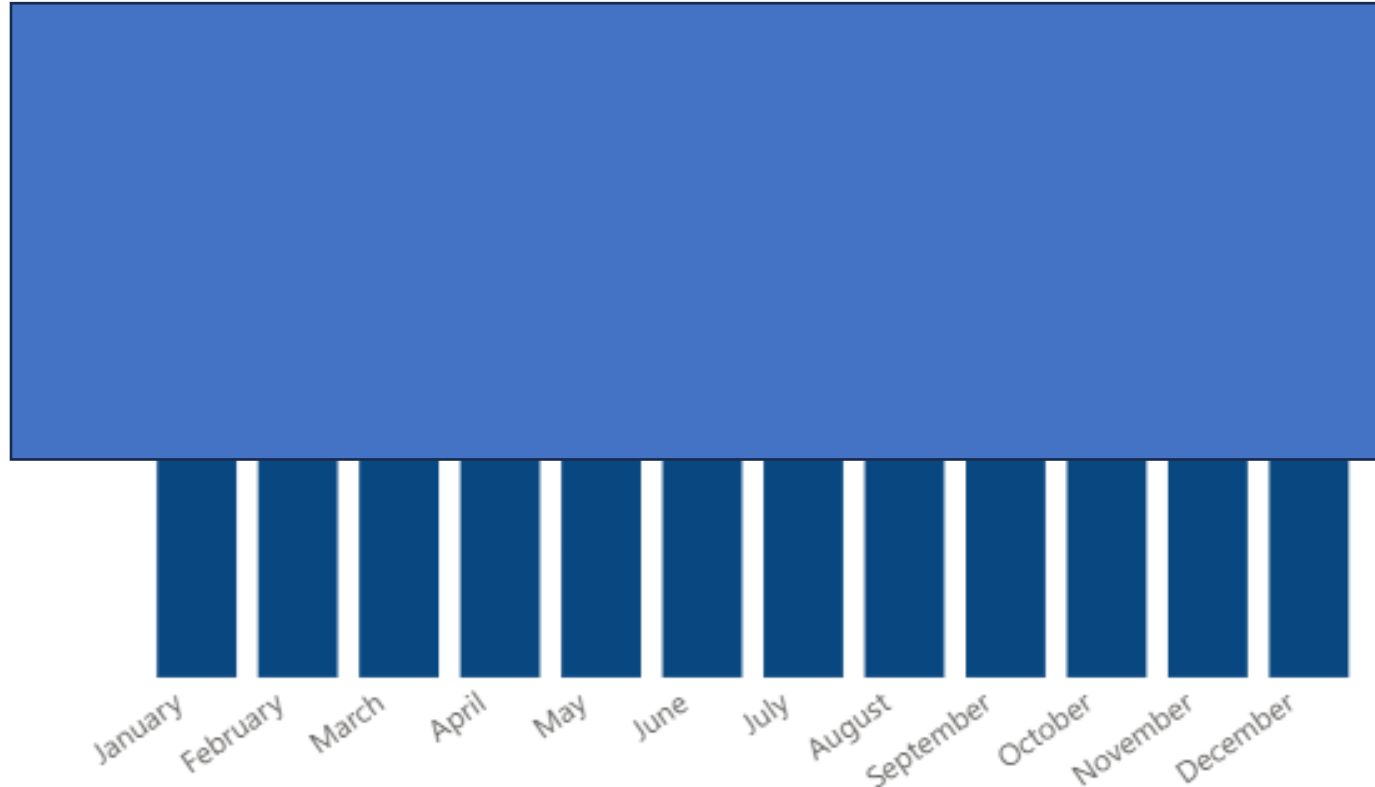


Local Listing Clicks Provider- Profile actions



Provider Finder

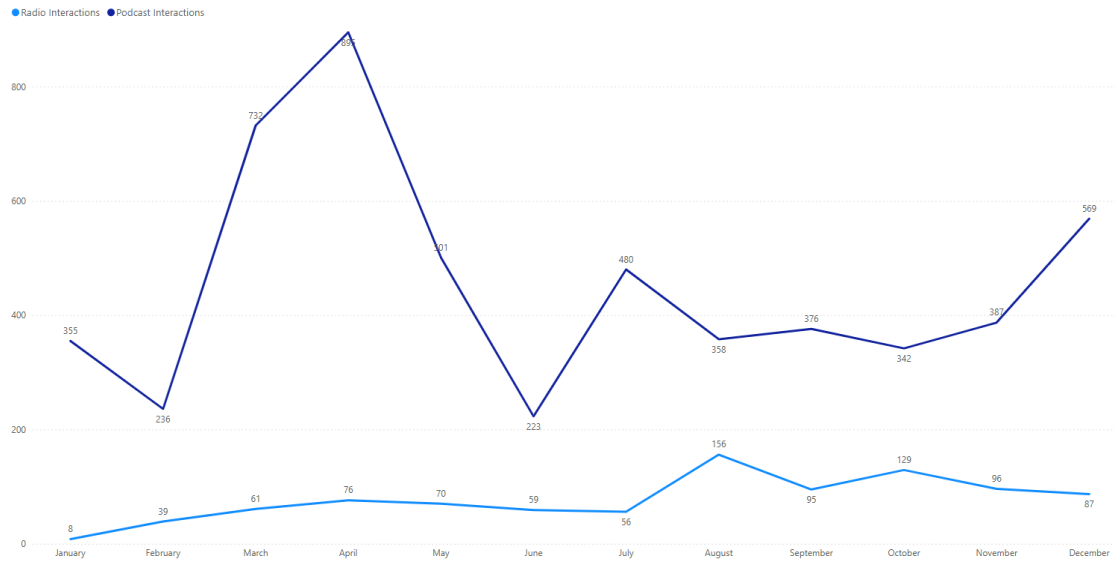
AP-Provider Finder Appointment Scheduled Online



Key Takeaways:

- Profile page enhancements in 2025
 - Press Ganey transparency reviews and star ratings
 - Provider videos
 - Digital team can add headshots, videos, and bios
- **401% increase in scheduled appointments** year-over-year

Radio and Podcast



Podcast interactions spiked in March and April. The content for these high performing podcasts were focused on behavioral health.

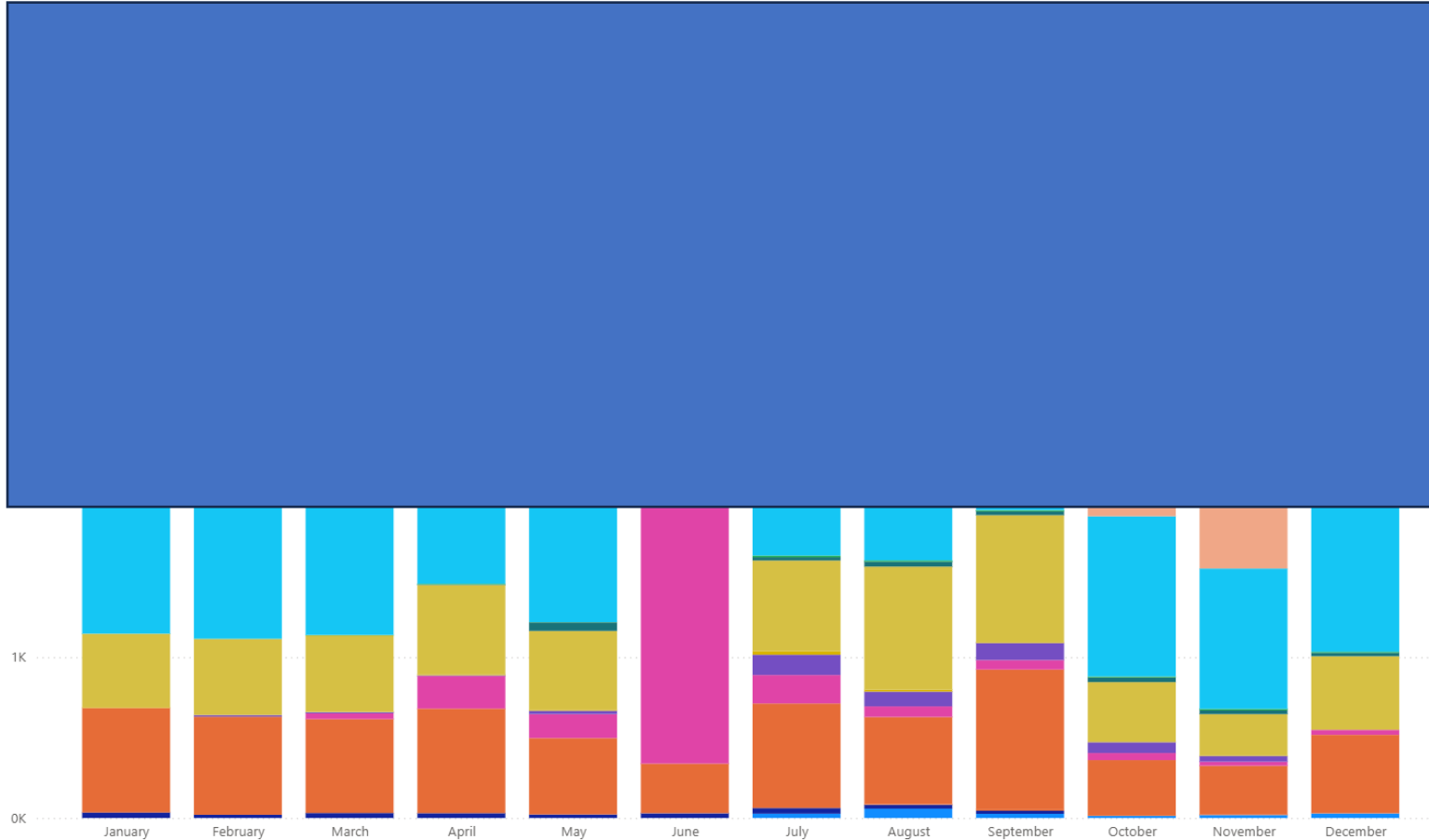
Each was highlighted on organic social and the LinkedIn newsletter.

- Screen Time and Mental Health
- Suicide Prevention Awareness

Cheers Campaigns Launched in 2025

1. **New Movers** (Monthly prospecting launches)
2. **Sports Medicine Prospecting Campaign Pilot** (Jan 6)
3. **Anthem AWV** (Jan 23)
4. **Breast Screening** (March 6)
5. **Therapy Referral** (March 11)
6. **Enhancements: No-show, Cancellation, SMS Opt-in** (March 27)
7. **No-Show for Therapy** (March 27)
8. **No-Show for Sleep Lab** (March 27)
9. **Advanced Care Planning Update Reminder** (April 10)
10. **ED Discharge Outreach** (May 1)
11. **Enhancements: Breast Screening Capacity Feature** (May 22)
12. **SC & Humana AWV Relaunch** (May 22)
13. **Aetna, Optum & Anthem AWV Relaunch** (May 29)
14. **Rush Campaign: Out-of-Network & Non-Contracted Communication** (July 8)
15. **Enhancements: No-show/cancellation (4 campaigns)** (July 21)
New Print Group added to SnapShot, Call Hub and Patient Encounter (July 22)
16. **Lung Screenings with Capacity Feature** (July 10)
17. **Enhancements: Service lines (4 campaigns)** (Aug 7)
18. **Rush Campaign: United Behavioral Health Communication** (July 24)
19. **Enhancements: Referral campaigns (2 campaigns)** (Sept 23)
20. **Enhancements: Misc. campaigns (4 total)** (Oct 27)
21. **Enhancements: Advanced directives (2 total)** (Oct 30)
22. **Sports Medicine Evergreen Prospecting** (Nov 13)
23. **AWV Relaunch (5 campaigns with enhancements)** (Nov 25)

CRM Scheduled Appointments (2025)



Key Takeaways:

- **37,647** total scheduled appointments attributed to Cheers campaigns in 2025
- **24** Cheers campaigns launched in 2025
- Spike in June while we were figuring out the new capacity-based campaign feature for breast screening
- Early adopter for **capacity-based feature**
- New Print Group added to SnapShot, Call Hub and Patient Encounter, allowing providers and call center to see the campaign communication
- **5 Epic Gold Stars Achieved** for Cheers after enhancing all active campaigns
- New **UTM Report** to track Provider Finder conversions attributed to campaign efforts
- ROI Dashboard implemented for the Breast Screening campaign: ~ \$304,802 revenue by procedure

Metric Report

Thank You

