# B2C Pharmacare: Retention Consulting Project

2025 Q3

## Goal

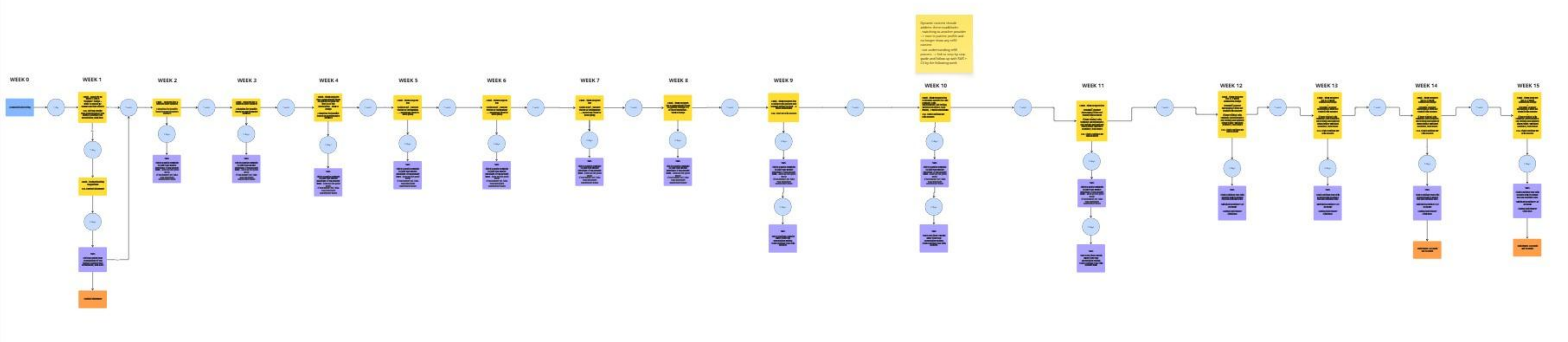
Leveraging email and SMS communications to improve First Refill Rate for a high-growth niche online pharmaceutical company.

First Refill Rate is a key input for overall retention and early signal for Patient Retention (affects churn, CLTV, NPS).

# AUTOMATED RETENTION FLOW

## Automated campaign flow (mapping on Miro)

- Entry criteria:
  - finish intake form AND
  - met with physician AND
  - obtained prescription
- Exit: finishedrescription OR refilled first prescription



# AUTOMATED RETENTION FLOW

## 1 Weeks 1-4

### Needs and motivations

- Want to lose weight safely
- Want to take charge of their health
- Need to establish routine for weekly injections

### Pain points

- Early side effect sickness
- Forget to take meds routinely
- Motivation to stay on med when results don’t show yet

### Opportunities

- Product: gamified progress bar
- Clinical: provide clinical support and med education benefits
- Lifecycle: weekly reachout during habit-forming period

## 2 Weeks 5-9

### Needs and motivations

- Want to be motivated to finish prescription
- Need to establish routine

### Pain points

- Lose motivation because of length of prescription
- Feeling alone in their journey

### Opportunities

- Product: match UX on product
- Clinical: provide social proof/testimonials from others
- Lifecycle: send reminders and success stories

## 3 Weeks 10-15

### Needs and motivations

- Want to continue taking their weekly injections
- Need an easy way to renew prescription

### Pain points

- Forget to renew prescription on time
- Not sure if safe to continue taking meds long-term

### Opportunities

- Product: pre-filled renewal docs
- Clinical: emphasize continued care
- Lifecycle: reminders & education on long-term use

# CROSS-FUNCTIONAL COLLABORATION

## Product

- Mirror copy and UX in app with automated comms
- Add in progress & encouragements

## Clinical

- Pass on data from intake session to personalize automated comms
- Review hand-off process so patient has smooth journey

## Data

- Capture relevant data in intake form
- Surface in automated comms
- Ensure patient info storage is compliant

## Legal

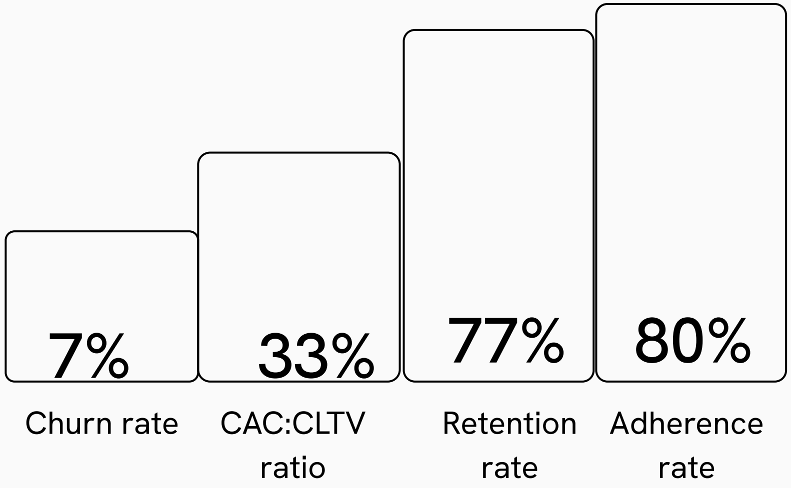
- Ensure HIPAA/PIPEDA compliance
- All comms to pass through for compliance & necessary footers/caveats

Flow | Collaboration | KPIs | Timeline

# KPIs & Benchmarks

- Email metrics:
  - Open rate
  - Click-through rate
  - Conversion rate
  - Unsubscribe/spam
- Customer Lifetime Value
  - CLTV:CAC - 3:1
- First prescription refill (adherence) rate
- Churn rate

## Potential growth for current business



# Next Steps

1. Kickoff meeting with stakeholders
2. Alignment on KPIs, data to capture/measure, resources, timeline
3. Resource requirements:
   a. CRM: intake data to pass through comms
   b. Data: capture right data & pass on to comms, benchmark measurements
   c. Product/Clinical: input for UX & customer success testimonials
   d. Legal: review copy, overall HIPAA/PIPEDA compliance
4. Launch & measure
5. Iterate with A/B testing & result validation

# Contact for your lifecycle strategy audit

I help founders and revenue teams get more from what they already have with smart segmentation, automation, and lifecycle strategies that move the needle.

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