CASE STUDY

Bon Secours Mercy Health reaches 8 million patients through largest, fastest Epic Cheers migration to date.

Building on its relationship with Nordic, the health system transitioned 18 established outreach campaigns to create a scalable, Epic-native patient engagement program.

NORDIC®



Overview.

As one of the largest Catholic health systems in the United States, Bon Secours Mercy Health (BSMH) sought to modernize patient engagement while advancing an Epic-first strategy. Building on its relationship with Nordic, the organization transitioned from Salesforce Marketing Cloud to Epic Cheers across 18 established patient outreach campaigns.

Through strong governance, cross-functional collaboration, and a phased implementation approach, BSMH maintained continuity while creating a scalable foundation for personalized outreach. As of September 30, 2026, the organization had 26 always-on campaigns live, sent more than 10 million messages to more than 8 million patients, and generated more than 868,000 successful conversions.

> Our goal wasn't just to move campaigns from one platform to another. We wanted to create a more scalable, Epic-native patient engagement strategy that supports personalized outreach, improves operational efficiency, and connects our communications directly to patient outcomes."
>
> **Sandra Mackey**
> Chief Marketing Officer
> BSMH

Key takeaways

- **18 patient outreach campaigns** successfully transitioned to Epic Cheers while maintaining continuity across patient communications.
- **26 live always-on campaigns** now support care gap closure, patient engagement, appointment recovery, and prospective patient outreach.
- **10 million+ messages sent** and **8 million+ patients reached** through email, text, and MyChart.
- **868,000+ successful conversions** generated, including appointments scheduled or completed and health maintenance outcomes.



The challenge.

47
Hospitals.

1,200
Care sites.

14 mil.
Patient encounters annually.

BSMH operates 47 hospitals and more than 1,200 care sites with approximately 21,000 providers supporting 14 million patient encounters annually.

Its mature, always-on outreach program used email, text, and phone communications to encourage preventive care, reconnect patients with services, promote MyChart adoption, and recover canceled appointments.

However, BSMH's existing customer relationship management (CRM) model could not scale to meet its long-term operational needs. The organization also saw an opportunity to reduce vendor complexity, access Epic-native clinical data, improve audience accuracy and reporting, and better align patient communications with Epic workflows.

The transition carried considerable complexity. BSMH needed to evaluate and migrate 18 high-volume campaigns with sophisticated audience criteria and multichannel journeys. The marketing, clinical operations, IT, and patient experience departments, as well as other stakeholders, needed to align on goals, ownership, and decisions, all while maintaining uninterrupted patient communications.

The solution.

Rather than approaching the work as a direct technology replacement, BSMH used the migration to evaluate its existing campaigns, simplify processes, clarify accountability, and strengthen its patient outreach operating model.

The project moved through five stages: discovery and audit, data mapping and validation, campaign redesign and rebuild, testing and clinical validation, and phased go-live.

The team first documented campaign audiences, content, channels, phases, reporting requirements, and relaunch priorities. This created a common view of every campaign before rebuilding began and helped BSMH avoid carrying unnecessary legacy complexity into Epic Cheers.



Governance was central to the transition. BSMH created a cross-functional committee with representation from marketing, clinical operations, IT, patient experience, project management, and Epic.

The committee provided oversight, resolved roadblocks, and maintained accountability. BSMH also clarified ownership across its digital product, clinical operations, patient experience, and IT functions for strategy, clinical validation, campaign build, quality assurance, data integrity, and reporting. Each campaign followed standardized intake, approval, build, and review.

To prevent communication gaps, BSMH used dual-running campaigns and controlled cutovers, monitored campaign volume and engagement, and conducted daily quality assurance during the first 30 days after launch.

Following initial planning and strategy meetings in April and May 2025, the health system launched Cheers campaigns weekly from August through December 2025.

The results.

The transition created a more scalable approach to patient outreach and a strong connection between engagement efforts and measurable outcomes.

As of September 30, 2026, BSMH had achieved:

- **10 million-plus messages sent** through email, text, and MyChart
- **More than 8 million patients messaged**
- **More than 868,000 successful conversions**, including appointments scheduled or completed and health maintenance outcomes
- **26 live always-on campaigns** supporting care gap closure, engagement, encounter-driven outreach, specialty services, and prospective-patient nurturing

Turning outreach into patient action.

Campaign-level results show how BSMH's outreach program translated into action.

An annual wellness visit campaign reached 105,310 patients, generated 25,378 scheduled appointments, and contributed to 22,216 completed visits. A separate canceled annual wellness visit campaign reached 6,377, resulting in 2,362 rescheduled appointments and 1,481 completed visits.

Other campaigns generated 23,666 scheduled appointments among 103,675 new patients reached and 17,623 MyChart activations among 52,167 patients reached.



> One of the biggest lessons we learned is that a CRM migration is not simply a technology project. Success depends on strong governance, clear ownership, cross-functional partnership, and a consistent focus on patient outcomes. This foundation is helping us connect outreach more directly to access, care completion, and long-term organizational impact."

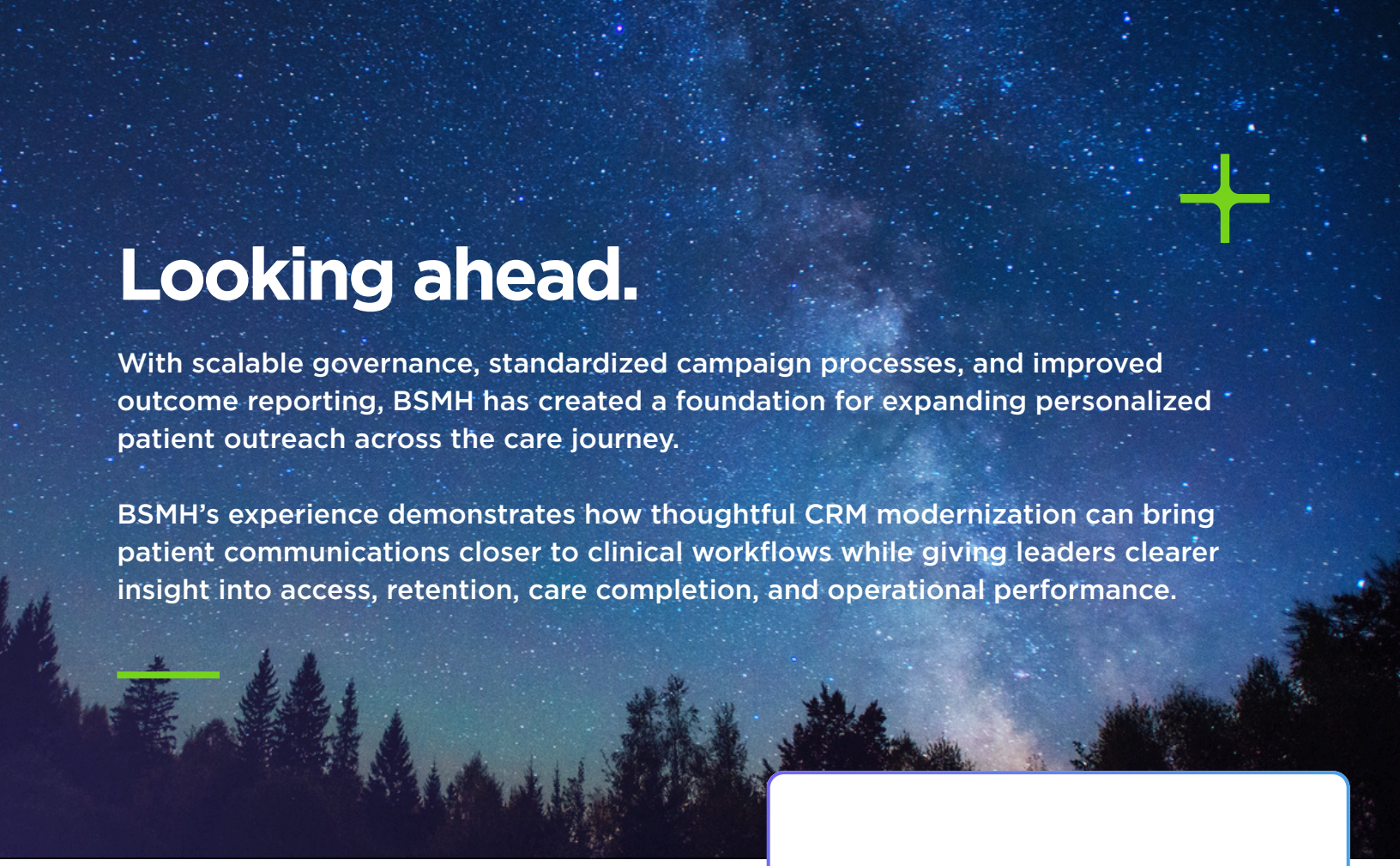
Kevin Hartman, MD
Ambulatory Chief Medical Officer
BSMH

Measuring what matters.

BSMH moved beyond traditional engagement metrics to evaluate conversions and return on investment. Its framework included appointments scheduled and completed, health maintenance outcomes, and cost per appointment or visit. Epic Cheers also improved audience inclusion accuracy, outcome attribution, data confidence, reporting workflows, and visibility into real-time engagement.

Adapting along the way.

The team encountered challenges, including differences in email functionality, limited email engagement reporting, multitouch campaign measurement, patient matching, and processing delays. Detailed documentation, defined ownership, frequent checkpoints, and close collaboration helped BSMH adapt while keeping the program moving.



Looking ahead.

With scalable governance, standardized campaign processes, and improved outcome reporting, BSMH has created a foundation for expanding personalized patient outreach across the care journey.

BSMH's experience demonstrates how thoughtful CRM modernization can bring patient communications closer to clinical workflows while giving leaders clearer insight into access, retention, care completion, and operational performance.

About Nordic.

Nordic is an award-winning global health and technology consulting company that partners with health leaders around the world to create healthier systems, organizations, and people. Together, our global team of more than 3,300 professionals brings decades of experience across our key focus areas of strategic advisory, digital and cloud initiatives, implementation and support, ERP services, and managed services.

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