



## CASE STUDY

# Engaging Customers at Every Stage How Rx Savings Used Direct Mail to Transform Their Customer Journey



### Saved Time

Over Old Manual Processes



### Higher Customer Engagement Rates with Direct Mail



## About

For more than a decade, RxSS has partnered with some of the largest, most innovative employers, health plans.

The company has shown the market that the best way to control pharmacy costs is helping members find and adhere to more affordable prescriptions.

## Industry

Healthcare

## Platform

Salesforce Marketing Cloud

## Audience

B2B2C

## Introduction

*Capturing—and keeping—a customer's attention is no small feat today. Rx Savings Solutions (RxSS), a forward-thinking company on a mission to help people save money on prescription medications, found themselves facing a challenge that's all too familiar: how to meaningfully engage members (their customers) at every stage of their journey, from first impression to loyal advocate.*

## Challenge

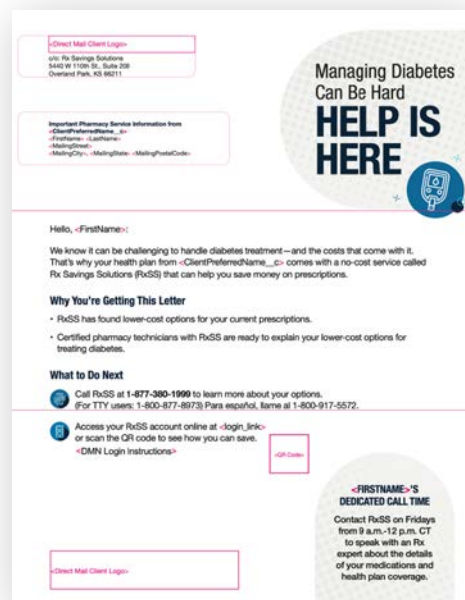
For RxSS, the stakes were high. Their members aren't just looking for savings—they're seeking clarity and trust in a complex healthcare environment. "We realized that our digital channels, while effective, were starting to blend into the background noise," shared Kristin James, Director of Engagement Marketing. "Emails can get lost in crowded inboxes if we rely solely on a one channel. We needed a way to break through and connect with people in a way that felt personal and meaningful."

The team recognized that a one-size-fits-all approach wouldn't cut it. They needed to deliver the right message, at the right time, in the right format—especially when dealing with sensitive health information. The challenge was to create a customer journey that felt as individualized as the savings they offered.

## Solution

That's when RxSS turned to PFL for direct mail automation. The concept was simple yet powerful: combine the reach and data-driven targeting of digital marketing with the tangible impact of physical mail. "There's something about holding a piece of mail in your hand that makes the message feel more real," James explained. "We wanted our members to feel seen and valued and not just another click or open rate."

By integrating direct mail into their omnichannel campaigns, Rx Savings Solutions sent personalized mailers at key moments—such as when savings were available on a member's prescriptions or when re-engaging those who had become inactive on digital channels. Each



piece was tailored, using data insights to ensure relevance. For example, when a member had an opportunity to save on their prescriptions, RxSS used data to clearly communicate the potential savings and guide them through the next steps.

## Results

The results exceeded expectations. Engagement rates soared as customers responded to the personalized touch. “We saw a significant lift in activation and retention,” noted James. “Our clients told us they appreciated the extra effort and the clarity of our communications.”

Beyond the numbers, the feedback was overwhelmingly positive. Many members expressed appreciation for the clear, proactive communication and the awareness it brought to their prescription spending options. The RxSS team also gained valuable insights into which messages resonated most, allowing them to fine-tune their strategy for even greater impact.

For Rx Savings, the journey doesn’t end here. With a proven playbook for engaging members at every stage, they’re poised to deliver even more value—and more savings—to the people who need it most.

### Key Takeaways

Rx Savings Solutions’ experience is a testament to the power of blending digital precision with human touch. By leveraging PFL’s technology, they didn’t just boost engagement—they built lasting relationships rooted in trust and value. “Direct mail helped us stand out in a digital world,” James reflected. “It reminded our customers that we’re here to help, every step of the way.”

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—Kristin James, Director of Engagement Marketing

