



How a 100+ clinic network made a digital lead strategy viable for in-person evaluations by adding Lumin.ai



Lumin.ai

CASE STUDY

About QC Kinetix

QC Kinetix is the largest regenerative medicine practice in the United States. Regenerative medicine uses the body's own natural healing processes to help patients with joint pain, injuries, or chronic conditions. It is an alternative to invasive surgery, and to harmful or addictive medicines such as opioids and cortisones. More than 45,000+ patients have completed treatments with QC Kinetix.



Culturally, QC Kinetix is deeply committed to a patient-centered process in which the prospective patient receives education, open communication, and a realistic assessment of treatability, then decides a suitable path.

Growth Opportunity: Make Digital Leads Viable

QC Kinetix recognized a strategic opportunity for digital leads to reach more patients who could benefit from regenerative treatments, by communicating with them to facilitate the initial stage of their journey.

Spencer Perkins, Director of Marketing at QC Kinetix, articulated specific elements of that opportunity:



Digital lead generation: QC Kinetix invests deeply in radio and television, which generates well primed prospects who connect directly inbound via phone; but the cost per lead is 8X higher than for digital leads.

The company was already generating a robust volume of digital leads, but saw this strategy's limitations, given the cost structure of a nationwide system of clinics and the characteristics of their market:

- ▶ It placed a higher burden on the call center by creating an obligation to catch prospects via outbound calls.
- ▶ It produced a higher ratio of less qualified leads.
- ▶ It missed a higher ratio of fully qualified leads—leads already paid for by the organization.
- ▶ It unnecessarily delayed the path to a first examination, and ultimately to treatment and comfort.

Justin Crowell, co-founder of QC Kinetix, challenged the team to prove out an equally robust strategy for following up, and for identifying the most qualified, motivated leads—all at scale.

Protecting patient and clinic time: Even for well-matched prospects, the traditional approach of attempting outbound calls was challenging for the patient. Conversely, some patients showed up for the in-person evaluation, only to identify a showstopper that could have been identified prior to the visit.

These challenges manifested in multiple metrics: the lead-to-appointment ratio, cancellations and no-shows, and overall conversion rates. With staff members and providers across the network in high demand, any wasted clinic time posed a substantial obstacle to serving patients with acute need for treatment.

Consistency and quality: In keeping with its cultural commitment to helping each prospective patient understand treatment options, medical fit, and financial obligations, the ability of the staff to communicate consistently was critical to the well being of patient, clinic staff, and company.

For QC Kinetix, it was imperative to standardize educational messaging and expectation setting across the call center and more than a hundred clinics. Given the regulatory complexity of healthcare, tightly controlling patient communications was essential to minimize legal risk across the organization.

Scale: The size and complexity of the QC Kinetix organization creates an array of unique requirements. Clinics need customization. Groups of clinics in metropolitan areas cooperate with each other to maximize scheduling flexibility for the patient. Regional differences in management necessitate variations in functionality. Local economic fluctuations create the need for continuous adaptation.

QC Kinetix would need a solution capable of meeting these enterprise-level requirements and working harmoniously with a well-oiled call center and their Salesforce patient management system.

Coordination: Spencer's team saw seamless coordination with the call center as being of paramount importance. Previous attempts to field digital leads via automated messaging had either run in a silo oblivious to the call center's efforts with the same leads, or run on a predefined schedule without adapting to communications from the patient—creating a disjointed communication experience for the patient.

Supporting the organization's commitment to a patient-centered process would require a solution sophisticated enough to succeed on both counts.

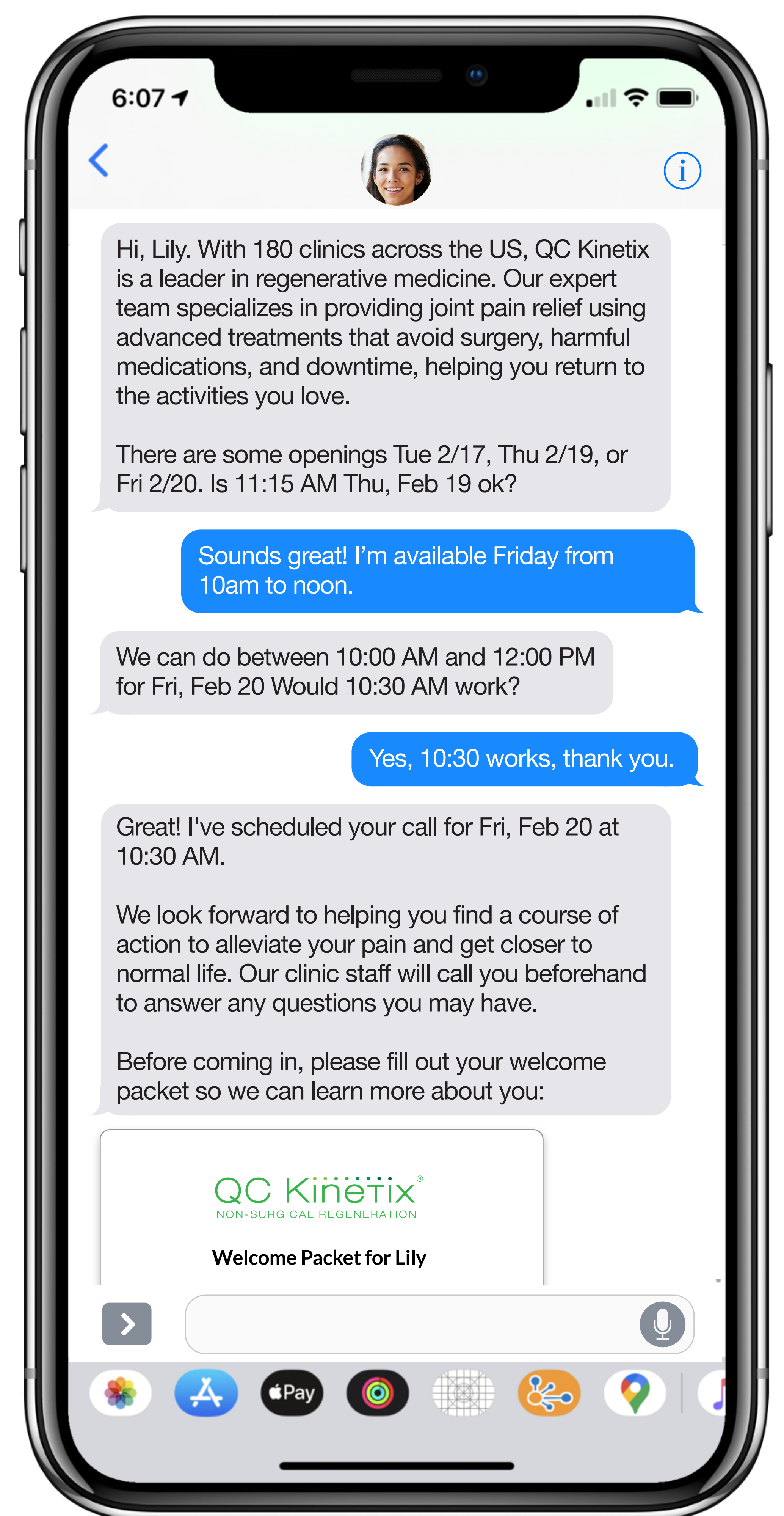
Solution: AI Collaboration with Call Center

QC Kinetix concurrently tested multiple external vendors. Just a few weeks after starting to pilot multiple vendors in parallel, QC Kinetix settled on a winning combination: Lumin.ai automated texting, with tight integration into their existing intake processes.

Call-center collaboration. The call center continues to handle 100% of leads from radio and TV, which generate inbound calls. For digital ads, the call center and Lumin.ai follow up concurrently.

Text first. Lumin.ai reaches out to every digital lead via text immediately as it arrives. Many engage immediately, learn what they need, and schedule an initial examination. The call center phones only the leads who still need attention after the first 30 minutes.

This sequencing adds a layer of value beyond raw conversion. By reserving costly call-center time for slower respondents, QC Kinetix focuses human effort where needed most. Prospects, in turn, enjoy a faster path to confidence in their chosen treatment path, and ultimately relief from pain.



Nurturing. Preparation for a smooth clinic experience continues after the patient schedules an examination.

To curb time and effort wasted on simple showstoppers such as financial options, Lumin.ai ensures that the patient is aligned with key expectations before finalizing an appointment. Lumin.ai then delivers a personalized digital medical clearance and welcome packet, creating a seamless handoff across channels. It later provides background information to streamline the visit, confirms the appointment, and greatly reduces the friction to reschedule if necessary.

Fluidity of experience. In keeping with the fluid, interwoven multi-channel experience, Lumin.ai performs those nurturing functions via text even if an appointment is booked by the call center via voice. Text interactions dynamically adjust based on patient responses and on information in the Salesforce record, ensuring that communication remains timely, relevant, and personalized, not repetitive.

For instance, a prospect can phone in to the call center to schedule, respond to a request for digital medical clearance received via Lumin.ai texting, reschedule via texting, and discuss a nuance with the call center.

Location flexibility. In many metropolitan areas, prospective patients learn of QC Kinetix via wide-area radio and television advertisements, and have some flexibility to travel to different clinics within the area.

Lumin.ai allows the patient to trade distance for timeliness, agreeing to drive further to be seen sooner. QC Kinetix controls which clinics are eligible for that synergy.

Omni-channel coordination. Coordination between Lumin.ai and the call center via the Salesforce CRM is essential. To support this, Lumin.ai and Salesforce update each other in much the same way that call-center agents interact with Salesforce.

For example, when a prospect schedules via text, Lumin.ai converts the record in Salesforce from a lead to a patient, so that the call center instantaneously knows not to spend labor time on outbound voice attempts. Conversely, when the call center makes an appointment, Lumin.ai finds out immediately from Salesforce and adjusts its communications appropriately.

Recapturing potential opportunities. QC Kinetix recognized that a “not right now”, or even total silence, often reflects timing rather than disinterest.

To turn pause into progress, the teams creatively structured recovery pathways: routing cancellation requests to a live team member to surface and resolve concerns, handling no-shows via immediate follow-up with frictionless rescheduling, and communicating with patients who had previously become distracted from engaging at various points along their journey.

These measures recapture lost opportunities while protecting valuable call center capacity.

Continuous optimization. QC Kinetix gradually increased its digital ad spend, rigorously tracking key indicators: booking rate, cancel rate, show rate, close rate, success rate and average spend per patient.

Armed with this visibility, the QC Kinetix and Lumin.ai teams collaborated, optimizing the strategy to adapt to evolving needs. They achieve this through a combination of data-driven insights, flexible, powerful software, and ongoing adaptive agility, while maintaining strict medical compliance.

“Lumin.ai complements our call center instead of replacing it. We meet patients where they are. We let patients choose when and how to engage. That creates a more accessible and respectful start to the patient journey.”

Alice Ying
Marketing Manager

Results: Identical Quality at Greater Speed

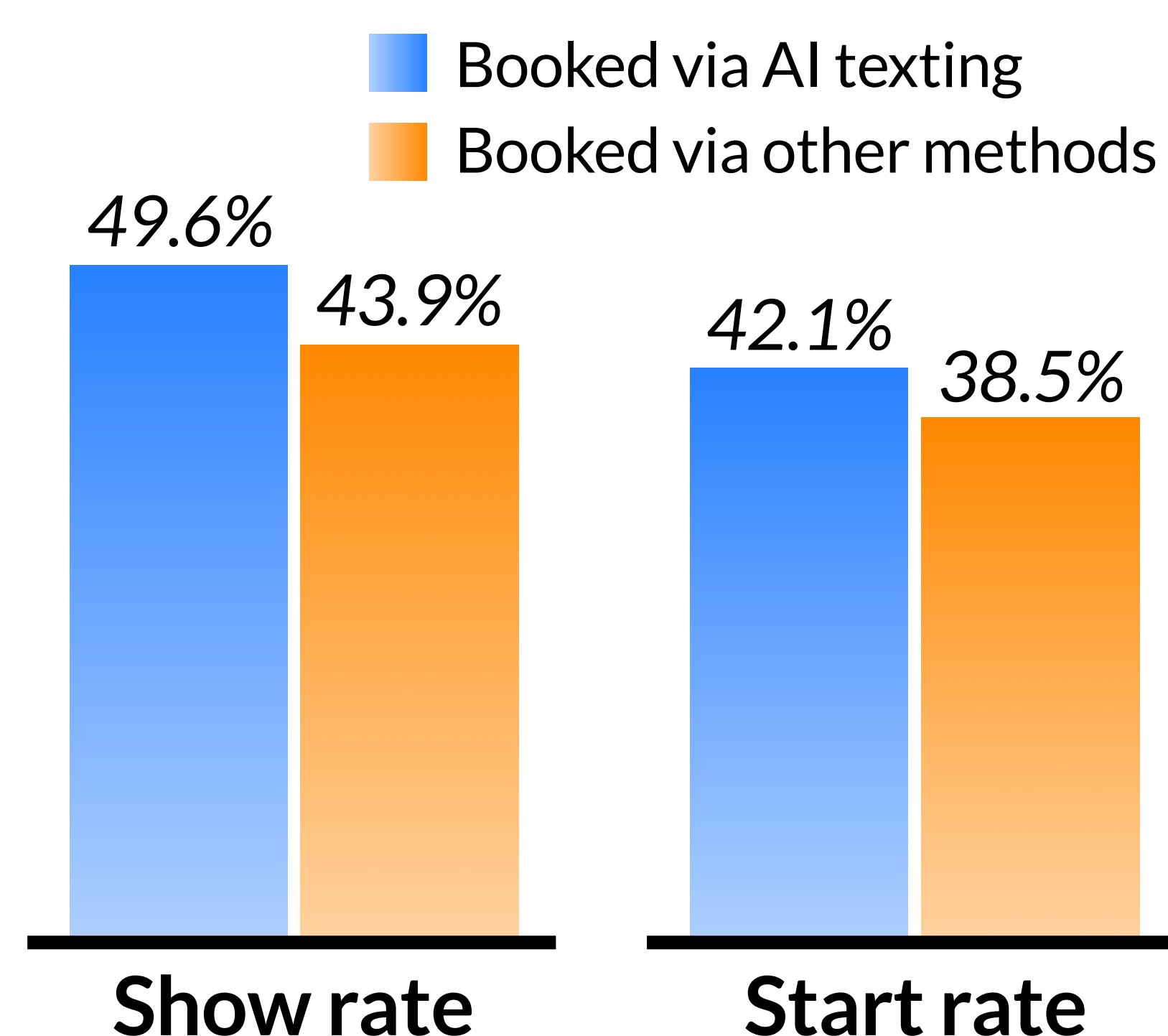
Synergy between call center and Lumin.ai made the digital lead strategy a success. Based on the commercially most important conversion metric, percentage of digital leads resulting in a sale, the call center alone averaged 4.5%, compared to 7.9% when paired with Lumin.ai—a 1.76X boost in effectiveness.

“Our digital ad strategy went from barely paying for itself to meaningfully shifting the company’s business model.”

Spencer Perkins
Director of Marketing

Clinic perspective. Recalling the occasional fear that ease of booking through Lumin.ai might attract prospects prone to wasting clinic time, the QC Kinetix team compared these two key metrics for digital leads who booked via Lumin.ai, and those who booked by other means: the **show rate**, which indicates intent to be evaluated; and the **start rate**, which measures medical and financial match.

Outbound lead quality for two patient populations



As the chart shows, the data entirely dispelled this concern.

Corporate perspective. Lumin.ai prequalified prospects and set clear expectations around insurance, pricing, and eligibility. This enabled consistent standards and centralized data tracking across clinics.

These qualitative improvements enhanced economic sustainability for QC Kinetix, by fundamentally shifting the margin structure of the business. Comparing paid lead acquisition as a percentage of revenue, the new digital lead strategy bettered inbound lead flow from radio and television by a significant factor of 3.75X.

Call center perspective. The flexibility of Lumin.ai and the call center allowed QC Kinetix to orchestrate them to tap the strengths of each channel: the call center leaves responsibility for all confirmations and onboarding packets to Lumin.ai, which in turn refers all Spanish speakers and all cancellation of call-center appointments to the call center.

Patient perspective. Most importantly, prospects experienced smoother, more responsive follow-up from QC Kinetix, reinforcing the brand’s stated intent to provide a patient-centered process that empowers each individual to make a fully informed decision that leads to a happy outcome.

QC Kinetix was able to serve a wide range of inquirers whose decision patterns differ. Prospects who responded to text-based outreach via Lumin.ai made appointments that were a median time of 5 days 11 hours in the future (and booked in a median time of 8 minutes). Others chose appointment times that were a median of 18 days 4 hours in the future.

Conclusion

QC Kinetix sought to craft a digital lead strategy that drives growth. But to realize the full value of this strategy, it had to be paired with omni-channel communication that complements the strengths of human agents in their call center with the scalability of an AI-enhanced patient engagement strategy.

The impact was reduced friction across the patient journey and materially lower acquisition costs, fully supporting the company’s values and operational standards.

“The digital lead strategy is a huge part of our path to growth. But to make it really work, we needed the ability to follow up with inquiries at scale, with a transparent, education-first experience for prospective patients.”

Lumin.ai has provided exactly that.

Spencer Perkins
Director of Marketing