

SECTOR: SPECIALTY HEALTH & WELLNESS  
 THESIS: AGGRESSIVE UNIT EXPANSION

SPONSOR: MIDDLE-MARKET PE (RECENT ACQUISITION)  
 ENGAGEMENT: AUDIT + IMPLEMENTATION

**+20%**

**Revenue uplift identified across 4 digital channels, with per-location economics that accelerated the sponsor's unit-expansion confidence.**

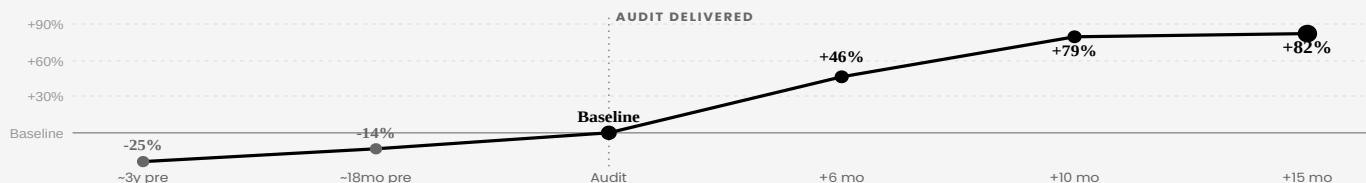
Quantified across Paid Search, SEO, Paid Social, and Conversion Rate Optimization in a Claymore Digital Growth Audit delivered at acquisition. Implementation in progress. Stronger per-location revenue economics directly supported a faster de novo rollout cadence.

**THE SITUATION**

A PE-backed specialty health & wellness operator, freshly acquired on an aggressive unit-growth thesis, entered Claymore's engagement with a tech and data foundation that could not scale with the plan. Fragmented systems across scheduling, CRM, and marketing. No single source of truth. No attribution across digital channels. Claymore was engaged to audit the foundation and install what the investment thesis required: a data layer capable of supporting multi-unit scaling.

**UNIT FOOTPRINT EXPANSION VS AUDIT BASELINE**

Clinic count indexed to audit date; executing the PE sponsor's acquisition thesis



Foundations get rebuilt before operations compound. The pre-audit footprint was constrained by a stretched data and systems foundation. The acceleration that follows is the foundation at work, enabling the sponsor's unit-expansion thesis to execute on plan.

**DIAGNOSIS**

- 01 Fragmented systems, no single source of truth**  
Scheduling, CRM, e-commerce, marketing, and reviews each running on separate platforms with limited integration. No unified view of customers, locations, or operating performance across the multi-unit footprint. A foundation built to scale would not emerge from this stack.
- 02 No attribution across digital channels**  
Zero tracking of spend-to-appointment across Paid Search, SEO, Paid Social, or site conversion. Marketing spend was unaccountable at channel and location level. Performance could not be managed because it could not be measured.
- 03 Passive referrals driving the largest acquisition channel**  
38% of new revenue came from word-of-mouth referrals, with no formal referral program, no tracking, no incentive structure. The single largest source of customer acquisition had no operating levers on it.

**INTERVENTION**

- 01 Systems**  
Migrated the website and forms off WordPress onto HubSpot CMS. Consolidated the tech stack into a HubSpot-centric ecosystem integrated with Boulevard (scheduling), Shopify (e-commerce), and Birdeye (reputation). One stack, one operating model, engineered to scale with the footprint.
- 02 Data & BI**  
Rebuilt the data layer from a near-blank slate. Single source of truth across marketing, operations, and clinical activity. Full attribution coverage. BI dashboards so the business runs on daily decisions, not monthly hindsight. Unified referral tracking, customer analytics, segmentation, and scoring at the foundation layer.
- 03 Customer Journey**  
Mapped the patient journey end to end across specialty services. Standardized lifecycle management from lead to appointment to ongoing care, with targeted interventions at each drop-off point. Consolidated inbound calls into a central call center.
- 04 Digital Channels**  
Four-channel revenue opportunity quantified and in active implementation: Paid Search (campaign consolidation, keyword expansion, Performance Max), SEO (existing + new content, local SEO, backlinks), Paid Social (conversion optimization, lookalikes, retargeting), and CRO (homepage, landing pages, signup flow).
- 05 Growth Operating Model**  
Installed the operating model that multi-unit scaling requires: unified reporting across all locations, standardized KPIs, real-time BI for operational decisioning, and a data foundation engineered to hold up as the de novo rollout continues.

**+20%**

REVENUE UPLIFT IDENTIFIED ACROSS DIGITAL CHANNELS

**+82%**

UNIT EXPANSION ENABLED, 15 MONTHS POST-AUDIT

**4**

DIGITAL CHANNELS QUANTIFIED AND IN IMPLEMENTATION

**1**

SOURCE OF TRUTH ACROSS THE PLATFORM

**DIAGNOSED AND DELIVERED USING THE CLAYMORE DIGITAL GROWTH AUDIT**

**01**

**Paid Search**

Campaign consolidation, keyword expansion, ad-copy and policy, Performance Max.

**02**

**SEO**

Existing content, net-new content, local SEO, backlinks, technical health.

**03**

**Paid Social**

Conversion optimization, lookalike audiences, retargeting, market and product expansion.

**04**

**CRO**

Homepage, paid landing pages, signup flow, message match across the path to conversion.