



From clean data to real results

How Health Catalyst scaled
segmentation, automation
and GTM alignment.



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What's the most ridiculous
data
fire drill
your boss has
ever invented?

SPOILER ALERT

Best-in class tech
has it's **limitations.**





We use a
data orchestration tool
to augment our tech stack
in a scalable way without
complex code.



www

Use Cases





The Challenge

We need to track
persona and buying unit
on both lead and contact
records at scale without
sending our smart campaigns
into
chaos mode.



The Solution

Have Openprise
record a persona and buying
unit on the lead
or contact record
based on title, seniority, and
job function.

NEW PERSON RECORD

As Entered

First	Joe
Last	Smith
Company	Memorial Hospital
Email	joe@hospital.com
Title	CFO
Job Function	
Seniority	
Persona	
Buying Group	



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NEW PERSON RECORD

Orchestrated

First	Joe
Last	Smith
Company	Memorial Hospital
Email	joe@hospital.com
Title	Chief Financial Officer
Job Function	Finance
Seniority	Executive
Persona	Finance Buyer
Buying Group	Solution A, Solution B, Solution C

We program business logic in Openprise ~~it~~ standardizes the job title then assigns values in job function, seniority, persona, and buying group based on that logic.



The Challenge

We need **account-level product data** for cross-sell and upsell, but it's stuck in CPQ, and Marketo can't touch it.

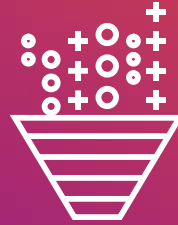
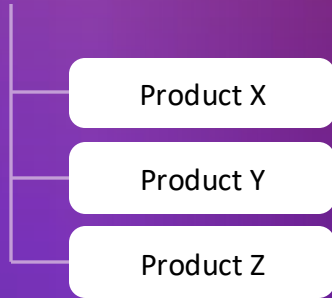


The Solution

Have Openprise
take the products
and **aggregate them**
into a single field on
the account record.

salesforce

Joe Smith Hospital
CQP Contract Data

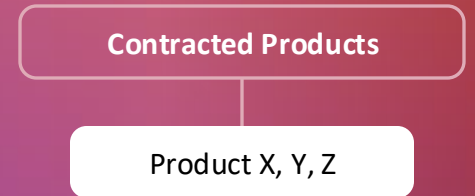


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salesforce

Joe Smith Hospital
Account Record





The Challenge

For accurate marketing program attribution, we need to **record different response dates** based on program type, but Salesforce's out-of-the-box field is basically Fort Knox.



The Solution

Have Openprise **record the correct date** into a custom field based on program type.

salesforce

John Doe

Campaign Record Data

Campaign Start Date

5/10/2025

Member Responded Data

5/20/2025

Content Program



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salesforce

John Doe

Campaign Record Data

Attribution Date

5/20/2025

Attribution Date Logic:

Rule	Operator	Value	Then	Attribution date source
Campaign Type	=	Event		Campaign Start Date
Campaign Type	=	HAS		Campaign Start Date
Campaign Type	=	Virtual Event		Campaign Start Date
Campaign Type	=	Website		Member Responded Date
Campaign Type	=	Content		Member Responded Date
Campaign Type	=	Paid Social		Member Responded Date
Campaign Type	=	Multichannel		Member Responded Date
Campaign Type	=	Email		Member Responded Date

NEXT STEPS

AI, BABY!

Smarter Prioritization

Create dynamic scoring models that accurately identify the best accounts, leads, and opportunities.

Dynamic Guidance

Define the right campaigns, outreach cadences, and sales plays based on proven behavioral signals.

Faster Campaigns

Accelerate campaign creation, segmentation and personalization.





TL;DR:

A solid data architecture
future-proofs your GTM systems and
creates the foundation
for AI that you can trust.



Thank you