WELLTHY AUTOMATES DATA-DRIVEN ALERTS TO CAPTURE $80,000 IN REVENUE

HEALTHCARE & LIFE SCIENCES

Wellthy

COMPANY Wellthy

LOCATION New York, NY

SNOWFLAKE WORKLOADS USED

COLLABORATION · DATA ENGINEERING · CYBERSECURITY · AI/ML · APPLICATIONS

DATA WAREHOUSE · DATA LAKE · UNISTORE

Wellthy is a care concierge platform that leverages technology to provide personalized and comprehensive support to individuals and families navigating the complexities of caregiving. A dedicated care team works closely with caregivers to understand their unique needs, preferences, and goals. All of this is facilitated on the Wellthy platform with seamless communication and collaboration between the care team, the caregiver, and other healthcare providers involved in their loved one's care. Wellthy covers nearly 2 million lives with comprehensive care infrastructure and benefits, and in 2023 was named one of Fast Company magazine's "Most Innovative Companies" and a "Top 10 Most Innovative Workplace" company.

CHALLENGE:

Wellthy works with some of the best-known companies in the world and their employees, offering caregiving support to thousands of unique caregiving situations and millions of sponsored lives. The company works with leading health plans, so delivering a consistent and smooth experience is a constant operational challenge. For Wellthy, member eligibility is changing every single day, so it's vital that these changes are surfaced to the appropriate teams.

Inaccurate data can completely derail the onboarding process, leading to fewer signups, conversions, and lost revenue. In order to combat this problem, the Care Team was spending hours hopping between systems trying to manually reconcile users with the necessary information, creating significant operational inefficiencies.
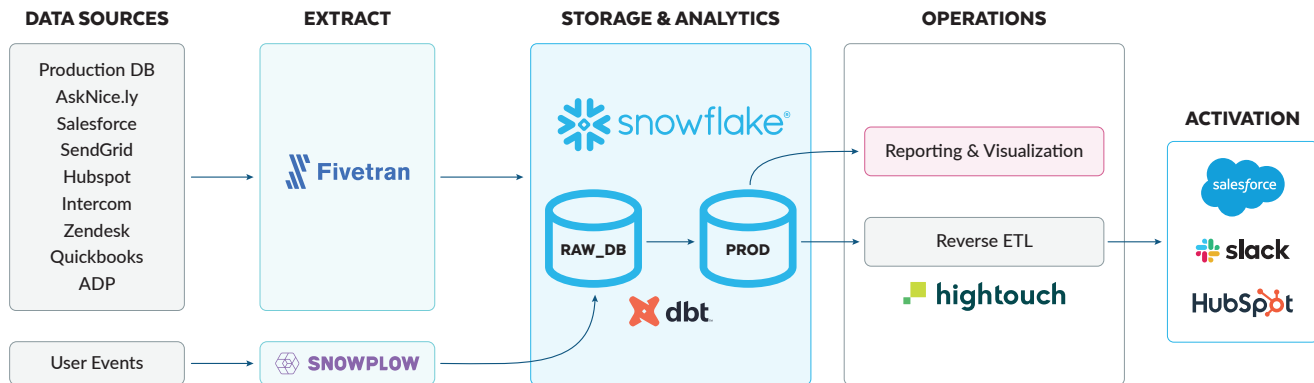
With no centralized view of members and minimal resources to model, transform, and track member data, Wellthy needed to:

- Build out a new data platform and establish a single source of truth
- Implement a robust data modeling framework to rectify and enrich member data from many sources
- Create automated alerting around the member onboarding process and experience

To solve the problem, the company turned to Snowflake, dbt, and Hightouch to address each step simply with the least operational cost and fastest time-to-value.

> "There's nothing more stressful than caring for a loved one. We need to be able to provide personalized support when and where they need it. Being armed with this information ahead of time makes for a better member experience."
>
> **—KELLY NELSON POOK,**
> Sr. Analytics Engineer, Wellthy

DATA SOURCES	EXTRACT	STORAGE & ANALYTICS	OPERATIONS	ACTIVATION

Production DB
AskNice.ly
Salesforce
SendGrid
Hubspot
Intercom
Zendesk
Quickbooks
ADP

Fivetran

snowflake

RAW_DB → PROD

dbt.

Reporting & Visualization

Reverse ETL

hightouch

salesforce
slack
HubSpot

User Events → SNOWPLOW

WELLTHY'S DATA ARCHITECTURE

SOLUTION:

Snowflake

To solve for building a new source of truth, Wellthy implemented Snowflake. Before Snowflake, the data team was operating out of an application Postgres database. This was causing the team to run into both concurrency and scalability issues because production databases simply aren't built to handle analytical workloads. Additionally, it was very difficult to pull in data from other sources.

Since adopting Snowflake, the data team has been able to easily and reliably pull data in from any source to aggregate and merge it into one clear, coherent member record. Wellthy no longer has to spend time manually scaling resources for various analytics jobs thanks to Snowflake's fully managed platform and auto-scaling capabilities.

> **We're trying to position ourselves to serve as many people as possible with the best caregiving assistance possible, and Snowflake powers everything we do, from analytics, to operations, to activation."**
>
> **—KELLY NELSON POOK,**
> Sr. Analytics Engineer

dbt

The second step was to build a robust data modeling framework without complex processes or manual builds. Enter dbt Cloud.

To fully unlock the value of Snowflake and better serve the needs of the business, the data team needed a reliable and scalable way to automate, orchestrate, and manage all of their data models within Snowflake.

This quest quickly led the data team to implement and standardize dbt across the entire organization. Since adopting dbt, the data team has built over 325 models and 2,500 different automated tests.

> **Previously, data teams would try to shove all of their transformation logic into one gigantic query. dbt lets us modularize the different stages of our transformation layers, standardize everything with version control, and easily use DAG visualizations to see how our models relate to one another."**
>
> **—KELLY NELSON POOK,**
> Sr. Analytics Engineer, Wellthy

Hightouch

Once Wellthy had their data centralized and modeled, Hightouch unlocked activation and alerting. With so many dbt models running in the background of Snowflake, Wellthy is constantly trying to identify possible exceptions to these models that are indicative of operational issues. However, there was added complexity because Wellthy needed to identify these exceptions without outright canceling or erroring existing dbt jobs that were running. The data team had built a ton of tests in the transformation layer, and stopping these dbt jobs would interrupt downstream data flows, and ultimately operational reporting.

In search of a solution, Wellthy quickly landed on Hightouch to power two core use cases:

- **Exception-based alerting:** User and account-level data is constantly changing for Wellthy, and delivering a good member experience means proactively identifying potential problems before they affect the member. The Care Team needs to know when an account or user is missing key information because this can halt the entire onboarding process.

- **Look-forward alerting:** Wellthy works with Fortune 100 companies, so it's important to notify internal teams of recent changes to client files. The Client Success team needs to know when company X increases (or decreases) the number of eligible users from 1,000 to 2,000 so that they can proactively confirm this new number, rule out upload errors, and allocate appropriate resources.

> **We have a ton of dbt jobs and tests running at all times, and we need to be able to identify potential problems without canceling or stopping our data flows. Hightouch lets us proactively send alerts to Slack so our Care Team can take action immediately."**
>
> **—KELLY NELSON POOK,**
> Sr. Analytics Engineer, Wellthy

Previously, identifying and rectifying these eligibility issues could take as long as six hours and involved pulling data on individual users manually—and in many cases, key stakeholders were even forced to contact the client or member directly. With Hightouch, this manual process is eliminated, saving Wellthy over 27 hours per month and generating huge cost savings because key employees can now redirect their efforts to more important tasks.

Wellthy has just scratched the surface with alerting, but the company has already been able to capture $80,000 in annual lost revenue from these two alerts. The data team is looking to implement this at a wider scale to proactively identify even more problems.

RESULTS:

- Established a single source of truth using Snowflake
- Captured an additional $80,000 in revenue from two alerts
- Saved 27 hours of manual data work using Hightouch, leading to huge cost savings
- Built over 300 models and 2,500 tests using dbt

WHAT'S NEXT?

As Wellthy continues to build out a modern data stack, the company is focused on activating the rich member data living in Snowflake. Wellthy is in the process of using Hightouch to move data out of Snowflake and enrich various downstream business applications like HubSpot and Salesforce to power hyper-personalization and ensure that every business team is working off of the same view of the member.

> **I've been working in the data space for over 10 years, and Snowflake, dbt, and Hightouch have solved 95% of the problems that I've run into. Together, these tools power everything we do at Wellthy."**
>
> **—KELLY NELSON POOK,**
> Sr. Analytics Engineer, Wellthy

ABOUT SNOWFLAKE

Snowflake enables every organization to mobilize their data with Snowflake's Data Cloud. Customers use the Data Cloud to unite siloed data, discover and securely share data, power data applications, and execute diverse AI/ML and analytic workloads. Wherever data or users live, Snowflake delivers a single data experience that spans multiple clouds and geographies. Thousands of customers across many industries, including 590 of the 2022 Forbes Global 2000 (G2K) as of April 30, 2023, use Snowflake Data Cloud to power their businesses.

Learn more at **snowflake.com**

snowflake.com   #MobilizeYourData