WebMD Ignite Audience Criteria Library

Audience Criteria available within the WebMD Ignite Growth Platform for audience targeting

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Purpose

This document provides an overview of the various criteria available in the WebMD Ignite Audience Criteria Library, detailing how users can leverage these criteria to define and refine target audiences for marketing campaigns.

The WebMD Ignite Audience Criteria Library is a **powerful tool** designed to enable healthcare organizations to build precise target audiences based on a wide range of data points.

Most Important Ideas and Facts

Audience Criteria Library Functionality: The Audience Criteria Library is the central repository for criteria used to "include or exclude individuals from your target audience." Each criterion has "unique parameters you specify when applied to an audience."

Unmastered Record Limitations: A critical point is that "Certain criteria (such as options in Encounter, Demographics, Models, and others) are not applicable to Unmastered records." Attempting to use non-applicable criteria will result in a "0 count for Unmastered records."

Key Data Sources: The diverse data sources (EMR, Consumer Market List, Call Center, HRA, Member List, Custom Activity, Marketing Automation Platforms) are foundational to the breadth of available criteria.

Available criteria filters

Activity criteria

Focuses on user interactions with marketing and health system initiatives. Important criteria include:

- **Activity Date**: Allows targeting based on when an activity occurred, with options for various timespans.
- **Activity Type**: Enables filtering by specific actions like:
    - Direct Mail Send
    - Email Click
    - Email Open
    - Email Send
    - Form Submit
    - HRA Submit
    - SMS Click
    - SMS Send
    - Web Visit
- **Associated Campaign/Channel**: Connects activity back to specific marketing efforts.
- **Call Disposition Call List, Call Type**: Call center data based filters
- **Content Request**
- **Custom Activity**
- **Direct Mail List**
- **Email Name**

- **Event Registration**
- **Form Name**
- **Health Risk Assessment**
- **Provider Referral**
- **Service Referral**
- **SMS Send Code**

Communications Criteria

Focuses on communication preferences and status:

- **Control Group**: Allows targeting individuals who are part of an enterprise control group. Available in Audience Settings.
- **Do Not Solicit (DNS)**: Important for excluding individuals based on their opt-out status (excluded by default). Available in Audience Settings.
- **Channel Availability**: Filters based on whether individuals can be reached via Email or Direct Mail or Phone or SMS.
- **Member Lists**: Provides the ability to target pre-defined lists of individuals (e.g., event attendees).

Demography Criteria

Focuses on personal attributes and location. Key criteria and their Unmastered record applicability are highlighted:

- **Birth Date (Age Range, Birth Month)**: Available for Unmastered records. Excludes minors (0–17) by default.
- **Deceased**: Excludes deceased individuals by default.
- **Education**
- **Gender**: Available for Unmastered records.
- **Head of Household**
- **Household Income Range**
- **Language**
- **Marital Status**
- **Market Area**
- **Patient Payor Name**
- **Postal Code**: Available for Unmastered records. Allows for targeting individuals within specific ZIP codes or defined "Market Area" polygons via map view.

Encounter Criteria

Leverages data from patient visits and medical interactions. None of these criteria are applicable to Unmastered records. Key criteria include:

- **Admit Date / Discharge Date:** Filters based on the timing of patient visits.
- **Admission Source**
- **Discharge Disposition**
- **Diagnosis / CPT / Procedure / MSDRG**: Targets individuals based on specific medical codes related to their visits.
- **Encounter Type**: Allows filtering by Emergency Room, Inpatient, and/or Outpatient visits.
- **Financial Class**

- **Facility**: Targets individuals who visited a specific location.
- **Payer Category**
- **Provider:** Enables targeting based on interactions with specific providers, their specialty, or role.
- **Service Line**
- **Sub-Service Line**

Household Criteria

Focuses on household characteristics and demographics, derived primarily from Consumer Market Lists. None of these criteria are applicable to Unmastered records. Important criteria include:

- **Child Count**: Filters based on the presence and number of children in a household.
- **Home Owner**: Segments based on home ownership status.
- **Household Age Bands**
- **Household Interests / Niches**: Targets based on reported or modeled household interests and characteristics.
- **Net Worth** : Filters based on estimated financial status.
- **Occupation**

Model Criteria

Utilizes data-driven models for sophisticated segmentation. None of these criteria are applicable to Unmastered records. Key models include:

- **Consumer Risk / Patient Risk**: Targets individuals based on their likelihood of having or developing certain conditions.
- **Payor Category**: Segments based on estimated insurance or payment status (recommended over the Encounter Payer Name/Category filter).
- **Recency Frequency**: Likely segments audiences based on their recent interactions and frequency of engagement.

New Movers Criteria

Specifically for health systems that purchase new mover data. None of these criteria are applicable to Unmastered records. Key criteria include:

- **Area moved from/to**: Targets individuals based on their previous and new locations.
- **Distance moved:** Filters based on the distance of the move. Must select at least 1 to avoid capturing null miles.
- **Move date**: Crucial for targeting individuals who have recently relocated.

Niches

A household clustering system that analyzes a sample of the U.S. population to segment the households into life stage and economic groupsProvide insights into each available niche.

Actionable Insights:

- When building audiences, carefully consider the data sources feeding each criterion to understand potential limitations and data availability.
- Pay close attention to the applicability of criteria when including Unmastered records in an audience.
- Utilize the time-based filters to target individuals based on their recent activity or encounter history.
- Leverage the Model Criteria for more advanced segmentation based on predicted risk, payor status, or engagement patterns.
- Always adhere to the default exclusions for minors and deceased individuals.
- For geographical targeting, both Postal Code lists and the Market Area map view offer flexibility.
- Note the recommendation to use the Payor Category model for targeting both patients and non-patients instead of the Encounter Payor Category filter, as the latter only considers the most recent visit.

The core themes highlighted in the document are:

- **Comprehensive Data Sources**: The platform integrates data from multiple sources, including Electronic Medical Records (EMR), Consumer Market Lists, Call Center Data, Health Risk Assessment (HRA) data, Member Lists, Custom Activity files, and data from marketing automation platforms (Eloqua, Salesforce Marketing Cloud). This integration allows for multi-dimensional audience segmentation.
- **Granular Audience Segmentation**: Users can define highly specific audiences by applying various criteria, either for inclusion or exclusion. This allows for tailored messaging and more effective campaign targeting.
- **Categorization of Criteria**: The criteria are logically grouped into distinct categories: Activity, Communications, Demography, Encounter, Household, Model, and New Movers. This organization helps users navigate and select the most relevant filters for their needs.
- **Handling of Unmastered Records**: The document explicitly addresses the limitations of applying certain criteria to "Unmastered records," which are likely less complete data entries. It provides guidance on which criteria are applicable to these records and directs users to a separate resource for a full list.
- **Exclusion of Minors and Deceased Individuals**: By default, the platform excludes minors (0–17) and deceased individuals from target audiences due to legal and ethical considerations. Users are cautioned against altering these defaults.
- **Time-Based Filtering**: Many criteria, particularly those related to Activity, Encounter, and New Movers, offer flexible time-based filtering using sliders and timespan selections (Days, Weeks, Months, Years). This allows targeting individuals based on recent activity or visits.
- **Use of Proprietary Models**: The platform incorporates proprietary models, such as Consumer Risk, Patient Risk, Payor Category, Perceptual Profile, and Recency Frequency, to provide deeper insights and enable more sophisticated targeting.
  - Best practice: Apply only 1 patient or consumer risk model per audience based on the campaign's objective.

Learn more in Ignite Growth Platform Help Center (log into your platform to access).