

# Restructuring Access-to-Enrollment Lifecycle for a Digital Health Program

Redesigned the access delivery and enrollment journey to improve conversion, reduce drop-off, and create a more scalable lifecycle system.

## Industry

Digital Health

## Focus Area

Lifecycle strategy, onboarding and engagement

## Scope

Activation to enrollment journey, messaging, channel strategy

## Timeline

2-week sprint + iterative refinement

## The Challenge

The client had an existing onboarding journey in place, including access code delivery and enrollment. However, the experience lacked a clear structure across timing, channel roles, and progression. Messaging was heavily concentrated in the first 1–2 days, with limited support for users who had not yet enrolled, creating gaps in the overall journey.

At the same time, the lifecycle program lacked clear structure across channels. Email and SMS were deployed without defined roles, timing logic, or behavioral triggers. This led to over communication in some moments, missed opportunities in others, and growing risk around SMS compliance and opt-outs.

### Key Insight

The issue was not simply messaging performance. It was a breakdown in lifecycle orchestration across timing, channel role, and behavioral responsiveness.

## Approach

The engagement focused on quickly diagnosing performance gaps and rebuilding the engagement journey into a more intentional, behavior-driven system.

### Journey Audit

Analyzed onboarding flows across email and SMS to identify drop-off points, channel overlap, and timing inefficiencies. Reviewed performance data to pinpoint when conversions were most likely to occur.

### Engagement Redesign

Expanded the journey from a compressed 2–3 day experience into a 12-day engagement window aligned to user behavior. Introduced messaging logic based on engagement signals and clarified channel roles.

### Channel and Timing Strategy

Defined clear guidelines for SMS vs. email usage, reduced message volume to limit fatigue and compliance risk, and implemented send-time optimization to improve engagement.

## Impact

The result was a more structured and scalable engagement system designed to improve both performance and user experience. The updated lifecycle reduced early-stage fatigue, extended the decision window, and created a clearer path to conversion.

### Improved conversion foundation

Shifted from a front-loaded journey to a sustained engagement model aligned with when users are most likely to convert.

### Reduced channel fatigue and risk

Decreased SMS volume and clarified channel roles, lowering the risk of opt-outs and carrier filtering.

### More adaptive lifecycle system

Introduced behavioral logic and timing optimization, enabling more personalized and effective engagement over time.