



Case Study • Customer 360

Health System in NY Unifies Patient Identity Across Epic®, Salesforce®, Google® and More to Achieve Customer 360 Vision

The Bottom Line

A large Health System in New York has grown rapidly through acquisitions and joint ventures, bringing new EHRs, CRMs, and data systems into an increasingly complex ecosystem. With every addition, delivering an exceptional experience across the network became more challenging.

To achieve its vision – a single, on-brand experience for every patient, no matter where they receive care – the Health System knew it needed to go beyond acquiring and consolidating systems. It needed to unite identities at every touchpoint along the care journey.

Verato unified, enriched, and managed identities across all their systems of record (including Epic and their labs joint venture), systems of experience (Salesforce) and systems of insight (Google Cloud®). With unified identity data, the Health System powered its Customer 360 initiative to enable personalized care, reduce administrative friction, drive intelligent growth across clinical and digital channels, and deliver an improved overall customer experience.

The Challenge

The Health System's network spans millions of patients and dozens of care sites. Following several major acquisitions and joint ventures, they faced significant data fragmentation – duplicate records, inconsistent identifiers, and disjointed patient experiences.

Initially, it turned to Verato to address a backlog of potential duplicate records within Health Information Management (HIM). The results were transformative: Verato Auto-Steward® automatically resolved 87% of duplicates, reducing manual review and improving data accuracy.

But as it began consolidating to a single Epic® instance, it became clear that identity resolution wasn't just a back-office issue; it was foundational to achieving a true Customer 360 experience. They needed a solution that could span Epic®, Salesforce®, Google Cloud®, and other systems to connect every identity, across every interaction across the care journey.

87%

of potential
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55M

identities unified and
flowing through
Verato

The Solution

Verato became the connective tissue of the Health System's digital ecosystem by unifying, enriching and managing identities across Epic®, Salesforce®, Google Cloud®, and other systems. By using Referential Matching® technology, Verato for Salesforce, and other capabilities of the Verato MDM Cloud™ platform, the Health System is able to accurately link and maintain over 55 million patient identities, ensuring every new record from an acquired or joint venture facility or digital touchpoint ties back to a single, trusted person. This approach supports their vision for creating exceptional, on brand experiences at every touchpoint and future-proofs their enterprise data strategy, enabling continuous growth and innovation.

The Results

With Verato as the foundation of its data strategy, the Health System now operates from a single source of truth for identity, powering its Customer 360 vision.

- **Patient records** are accurate and consistent, no matter where care is delivered.
- **Clinicians and staff** access a complete, unified patient view across all systems.
- **M&A integrations** are faster and cleaner, reducing friction across departments.
- **Digital initiatives** from personalized outreach in Salesforce to insights in Google Cloud now run on trusted identity data.

And with Verato Referential Matching®, our patented approach to identity resolution:

- **87% of potential duplicates** are resolved automatically—eliminating manual review and accelerating data cleanup.
- **55 million identities** are unified across the enterprise—creating a single, trusted source of truth for every person in the network.

This transformation allows the Health System to deliver not just coordinated care, but a cohesive, consumer-grade experience—where every interaction feels connected, every record is trusted, and every patient is truly known.

Key Takeaway

What started as an attempt to fix an identity issue across various systems developed into a digital transformation that laid the groundwork for a successful Customer 360 strategy.

As consumerism grows, patients have more choices, which increases the need for health systems to understand their patients. However, without a unified view of identity across all enterprise systems, organizations will find it difficult to see the full patient journey, deliver exceptional, connected experiences during consumer outreach and clinical visits, and also run data-driven, precision marketing campaigns that drive growth and patient lifetime value. Health systems that don't execute a Customer 360 strategy risk falling behind their competitors.

With Verato, health systems unify, enrich, and synchronize patient data to create a 360-degree view of patients, enabling trusted insights, personalized engagement, and better outcomes. Learn more at verato.com.

“We found that Verato had a stronger influence using its referential data matching over products we'd used in the past. As we continue to onboard new entities into Epic, there's a path for how we're going to strategically leverage the insights that Verato's referential matching has been able to provide to us.”

AVP, Product Services and Management,
Clinical Digital Solutions for this health system



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