

CASE STUDY

How Bassett Medical Group improved outreach using Epic Campaigns

Bassett Medical Group used Epic Cheers - Campaigns to personalize and streamline patient outreach. The collaboration achieved measurable success in diabetes management, breast cancer screenings, and flu vaccinations. The three-step approach that Bassett took — creating multidisciplinary teams, ensuring campaigns match organizational readiness, and assigning initiative ownership — offers an approach for improving overall population health and patient engagement.

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Read time – 7 minutes

Audience

- Hospitals and health systems



Overview

The challenge

Bassett Medical Group set out to improve patient outreach for a diverse patient population and address persistent gaps in preventive care, chronic disease management, and vaccination coverage. Executing effective campaigns requires the alignment of organizational resources, clear communication, and tailored outreach to meet the needs of different patient groups. These efforts are vital for improving access to care and supporting population health efforts.

The organization

Bassett Medical Group is a comprehensive healthcare network based in Central New York, serving communities across eight counties. It is anchored by Bassett Medical Center, a 180-bed acute care teaching hospital in Cooperstown and includes primary and specialty care, outpatient clinics, and long-term care facilities. Bassett prioritizes rural healthcare delivery and combines innovative medical practices with community-focused care. Bassett also supports medical education and research through its affiliation with Columbia University.

The approach

Bassett sought to modernize its patient outreach and engagement by replacing its defunct patient engagement platform with Epic Cheers - Campaigns. With support from Optum Advisory, Bassett implemented Epic Cheers - Campaigns to run targeted, measurable campaigns from within its electronic health record (EHR). The transition to Epic Cheers - Campaigns wasn't just a system upgrade. It marked a fundamental shift in how Bassett had to structure and support its campaigns. To ensure successful execution, Bassett followed a three-step approach: forming a multidisciplinary team for streamlined decision-making, aligning campaigns with capacity and organizational needs, and setting up intake and implementation processes.

As part of the Epic Cheers product suite, Epic Campaigns allowed Bassett to coordinate and personalize messaging and marketing efforts using data from Epic systems. Epic Cheers - Campaigns acts as an omnichannel platform, which facilitates communication across diverse patient demographics, digital literacy levels, and varying degrees of familiarity with the organization.¹ Outreach spanned MyChart messages, visit summaries, emails, texts, calls, and printed letters, helping ensure equitable access and reduce digital disparities.

The result

Bassett successfully executed campaigns that addressed uncontrolled diabetes, breast cancer screening, and flu vaccinations. These campaigns led to increased appointment scheduling, improved chronic disease management, early detection of breast cancer, and expanded vaccination coverage. For example, the breast cancer screening campaign led to 17 new cancer diagnoses and 757 imaging services delivered.²

Approach

How Bassett used Epic for campaigns

Bassett Medical Group partnered with Epic to leverage the Cheers - Campaigns tool to improve patient outreach and engagement across various health initiatives. By integrating Epic's customer relationship management (CRM) capabilities, Bassett aimed to deliver targeted and measurable campaigns to address gaps in care.

Bassett Medical Group recognized the need for a systematic approach to successfully execute campaigns. The approach followed three key steps, listed below.

The three steps

01 Create a multidisciplinary team for streamlined decision-making

02 Ensure campaigns match capacity and organizational readiness

03 Assign initiative ownership and coordinate alignment checks

01 Create a multidisciplinary team for streamlined decision-making

Early in the implementation of Epic Cheers - Campaigns, Bassett found the technical setup straightforward but faced challenges with operational decision-making. Uncertainty around ownership of various processes led Bassett to create a standardized intake system to streamline communication and avoid wasting resources.

Bassett established a multidisciplinary team to own and personalize the intake process and campaign execution. The Epic Campaigns Workgroup, co-chaired by the PCMH Manager and Director of Informatics, served as the central hub for intake, coordination, and oversight. This structure involved all stakeholders early and ensured consistent evaluation of campaign requests. The team also relied on a strong application manager, whose leadership helped streamline implementation and troubleshoot issues as they arose.

In addition to formal roles, Bassett invested in building internal champions who could communicate the “why” behind each campaign and foster buy-in across departments. These champions played a critical role in maintaining momentum and keeping campaigns people-centered and value-driven. Regular meetings reinforced alignment and provided a forum for addressing concerns and sharing updates. Together, these efforts enabled Bassett to move campaigns from concept to execution with clarity and confidence.

02 Ensure campaigns match capacity and organizational readiness

To ensure campaigns delivered meaningful results, Bassett focused on initiatives that aligned with its strategic goals and fit within their existing capacity. The Epic Campaigns Workgroup evaluated each campaign request through the lens of organizational fit, considering whether the campaign supported broader population health objectives, addressed known care gaps, and aligned with available resources.

If any one of these three elements is missing, the campaign risks falling short. For example, even if a campaign is well-timed and strategically aligned, it will fail if the organization lacks the capacity to deliver services like screenings or appointments. Outreach without follow-through can lead to patient frustration and missed opportunities for care.

Assessing campaign initiatives for organizational fit

Population health objectives	Known care gaps	Available organizational resources
<ul style="list-style-type: none"> Does this campaign directly support our organization's top population health priorities (e.g., chronic disease management, preventive screenings)? Will the campaign measurably improve outcomes for a specific patient group or community segment? 	<ul style="list-style-type: none"> Does the campaign target a documented gap in care (e.g., low screening rates, missed follow-ups, under-vaccination)? Is there reliable data showing which patients are affected by this gap? 	<ul style="list-style-type: none"> Do we have sufficient capacity to accommodate an increase in the services promoted by the campaign? Are schedulers and other operators ready for an increase in demand?

03 Assign initiative ownership and coordinate alignment checks

The most critical step in Bassett's intake process was assigning an operational owner to each initiative. These owners defined the campaign's target population and outreach methods. The Epic Campaigns Workgroup supported operational owners by helping to establish success metrics for each campaign, such as number of scheduled appointments, completed screenings or vaccinations, and new diagnoses resulting from outreach.

The team tracked progress using reporting tools within Epic and collected data by creating dashboards for each campaign. These dashboards supported ongoing reporting and could be shared to showcase current performance.

Operational owners facilitated regular alignment checks to ensure all participants understood campaign goals. These meetings helped stakeholders — including the chief marketing officer, chief medical information officer, head of the physician group, and physician champions — coordinate next steps before moving a campaign forward. Project teams intentionally paused campaigns whenever stakeholders felt disconnected or unclear about objectives. This allowed everyone to regroup and reinforce goals. For example, the campaign team for annual wellness visits paused to ensure appropriate inclusion criteria and meticulous planning, while the team focused on flu vaccinations staggered outreach to ensure sufficient capacity for visits.

Bassett's intake process for campaigns



Lastly, poor data quality can lead to ineffective outreach and alert fatigue among patients, causing important communications to be ignored. While Bassett did not require significant data cleanup prior to launching campaigns, successful workflows depended on having trustworthy data. Organizations new to Epic or with unclear workflows may need to invest in data quality improvements before starting similar initiatives.

Results

How Bassett knows it's working

Bassett Medical Group's collaboration with Optum Advisory for Epic Cheers - Campaigns has led to patient engagement innovations. The results demonstrate the impact of more coordinated outreach, with measurable success across three distinct campaigns.

Uncontrolled diabetes campaign

188

Patients scheduled appointments, received diabetes management medication, or started using continuous glucose monitors

99

Patients achieved A1C levels below 9, demonstrating improved diabetes control

Breast cancer screening campaign

17

Patients identified with breast cancer through outreach efforts

757

Patients received imaging services, supporting early detection and preventive care initiatives

Flu vaccination campaign

78,781


Outreaches delivered to target populations

11,663

Patients either received flu shots at Bassett or updated records of vaccinations received externally


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Endnotes

1. Overview of Cheers. Epic Systems Corporation. 2025.
2. Unless otherwise specified, all information in this case study came from Advisory Board interviews with officials from Bassett Medical Group.

Partnering with Optum Advisory

Bassett partnered with Optum Advisory to implement Epic Campaigns and improve patient outreach and engagement.

- Optum provided project management and leadership to ensure a successful launch.
- Optum guided Bassett through the transition from their legacy system to Epic using Epic's MyChart and patient portal for coordinated, data-driven campaigns.

Learn more about [Optum Advisory's provider technology services](#).

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