Flash Precision Marketing: Case Studies

Eighteen case studies from Flash Precision Marketing engagements and in-house marketing operations work, 2018 to 2026. Every figure comes from project records. Clients are described by industry, not by name. Lines marked **[Add before publishing]** flag a result that has not been measured yet.

1. Turning 8,000 cold leads and 1,167 suppliers into a ranked sales plan

Client: Patient-handling medical device company
Channel: Durable medical equipment (DME) dealers and care facilities
Tools: Python, Apollo, Dynamics 365, NPPES, CMS public datasets

The challenge

The client's product pairs with a standard patient lift. DME dealers had walked away in the past because the product could not be billed to insurance. Once billing coding was solved, the company needed to know which dealers and care organizations to call first. The sales team was working from large, unranked lists.

What I did

I built two scoring models, one for each side of the market.

Facility lead model. A Python scoring engine ranks about 8,000 Apollo leads from 0 to 100. It combines four sub-scores: population fit, buying signals, organization type, and clinical indicators. An organization-type multiplier and automatic top-score rules handle the clearest fits. Leads are enriched with NPPES provider records and CMS Nursing Home Compare data. The output is a five-tab workbook the sales team can sort and filter.

DME supplier model. A second model ranks 1,167 US Medicare DME parent companies on a two-layer, 100-point score. Layer 1 measures fit and Layer 2 measures readiness, weighted 50/50 into a composite. Companies fall into A, B, C, and D bands. Inputs include CMS DME by Supplier data (DY2024), NPPES, CMS Provider Enrollment (January 2026), and a matrix of HCPCS coverage by state. Suppliers that billed big-equipment codes such as lift chairs and portable overhead lifts earned a bonus.

Working with leadership

The model was tuned live with the company's leadership. In one review round, we cut signals that did not drive buying decisions, such as regulatory pressure and procurement pathway. We set intermediate care facilities as the top priority and raised pressure-ulcer treatment to a 10x clinical weight. Each round, leadership could see how the composite scores shifted before approving.

Results

- Every DME supplier in the national Medicare data was ranked and banded, giving sales a ready A and B target list.
- High-scoring clinical prospects were converted to CRM opportunities with related contacts and accounts attached.
- Automated sequences were stopped on those contacts so reps could move to direct one-to-one outreach.
- All records were tagged so the scored cohort can be filtered and tracked in the CRM.

DME supplier model, latest grades:

Grade	Composite score	Parent companies
A	80 and above	9
B	60 to 79	254
C	40 to 59	494
D	Under 40	339
Removed by hard gates	No active enrollment, payer overlap or footprint	71

- 2,254 deduplicated dealer contacts are attached for outreach.
- A cold dealer outreach sequence sent 5,896 emails at a 47.7% open rate.

2. Finding the right 28 physicians in a list of 2,000

Client: Clinical AI startup in early cancer detection
Audience: Advanced endoscopists and pancreatic specialists
Tools: Python, Apollo, HubSpot, CMS Medicare claims, NPI Registry, PubMed, ClinicalTrials.gov

The challenge

The client's platform supports a narrow set of procedures used to diagnose pancreatic cancer. A generic list of gastroenterologists wastes outreach on doctors who never perform them. The client needed to know which physicians actually do this work. It also needed to keep an endoscopy product from being pitched to surgeons.

What I did

Volume-based scoring. I scored a list of about 2,000 Apollo contacts using public federal data. The primary score measured each physician's overall endoscopy volume from CMS Medicare claims. A second measure captured how much of that work is pancreatic (ERCP, EUS, and EUS-guided biopsy). Contacts who missed the primary bar got a secondary score. It used two signals: practicing in a high-incidence state per CDC data, and being research-active.

High-engagement workflow. I built a HubSpot workflow that captures contacts engaging heavily with email and the website. A script scores each one on title keywords, credentials, procedure mentions, Apollo enrichment tiers, and publication history. It excludes contacts with

active deals across whole health-system families, not just the single account. A filter stops research scientists and other non-clinicians from being falsely promoted by their institution's data.

Independent verification. Four public sources confirm each candidate. The NPI Registry confirms specialty and credentials. PubMed separates true procedure operators from general researchers and confirms the current institution. ClinicalTrials.gov checks for principal investigator roles, the strongest single signal. Guardrails block false matches on common names.

The output

Tier	Contacts	Definition
Top	28	High endoscopy volume and pancreatic focus
Primary campaign	286	Strong pancreatic signal from procedures, trials, or keywords
Warm secondary	117	High-incidence state and research-active
Cool secondary	561	One of the two secondary signals
Cold secondary	1,007	Neither signal; deprioritized

Inbound engagers are ranked separately into pancreatic EUS experts, qualified advanced endoscopists, pancreas surgeons (held apart), and academic readers needing manual review.

Results

- Outreach effort was concentrated on 28 confirmed top-fit physicians instead of 2,000 contacts.
- More than half the list (1,007 contacts) was deprioritized before any rep time was spent.
- Surgeons were routed away from an endoscopy pitch.
- I paired the targeting with a three-email awareness sequence built for deliverability: no link in the first email and reply-only stop rules.

3. Email governance across 78 million sends and a 1 million contact database

Client: National B2B industry association and media company
Role: Director of Marketing Operations
Tools: Dynamics 365 Customer Insights, HubSpot Marketing Hub Enterprise, Chart.js, Excel

The challenge

Many teams sent email from the same database under different sender names across six domains. No shared rules defined who should get email, so unengaged and invalid contacts

stayed in sends. Opt-outs were climbing. The common explanation was simply "too much email."

What I did

Sender audit. I audited more than 78 million sends across six sending domains. The audit cataloged every variation of the "from" name in use. It produced a sender standardization framework that the organization adopted.

Marketing contacts strategy. I designed a contact strategy for a database of about 1 million records. It defines four exclusion segments: no email address, bad email or hard bounce, global unsubscribe, and inactive. A count of contacts with no opens in 18 months helped size the remaining marketable database. Phase 1 delivered a marketing contacts segment and a paid media audience segment by ideal customer profile, both built in Dynamics 365 and pushed to HubSpot.

Opt-out analytics. I built an interactive opt-out dashboard to test the volume explanation. The data pointed instead to unsegmented event blasts as the driver. A June 2025 spike in opt-out rate for event and trade show emails supported that view.

Sending guidelines. I turned the findings into written Email Sending Guidelines for every team that sends. I opened the policy discussion with a short, purpose-first brief so the meeting could focus on decisions.

Results

- One sender standard adopted organization-wide, replacing ad hoc "from" names across six domains.
- A defined, segmented marketable database, with invalid and unengaged contacts excluded.
- The opt-out conversation moved from cutting volume to fixing segmentation, backed by data.
- I also opened an investigation into whether email security scanners inflate click data, to protect reporting accuracy.
- Sender compliance rose from 48.4% in the audit window to about 84% over the most recent four months (see case study 18).

4. Building the measurement foundation: 30+ initiatives, 4 dashboards, one tracking standard

Client: National B2B industry association and media company
Role: Director of Marketing Operations
Tools: HubSpot Marketing Hub Enterprise, Dynamics 365, Excel

The challenge

Marketing ran on two systems: HubSpot for marketing and Dynamics 365 as the CRM. Leads arrived without reliable source data, and every team tagged links differently. Leadership could not see which content or channels moved pipeline. Requests reached marketing operations with no shared order of priority.

What I did

Roadmap. I built a sequenced marketing operations roadmap with more than 30 initiatives grouped into 6 waves. Each wave was ordered by company objectives and cross-team dependencies.

UTM standard. I created one UTM naming convention for the whole marketing team. It is enforced through an Excel-based link builder with dropdown validation and conditional filtering, so bad tags cannot be entered.

Form attribution. I added conversion URL tracking to every HubSpot form. Each lead now carries its landing page, form name, and source URL, synced to Dynamics 365.

Dashboards. I built four HubSpot dashboards that follow the buyer journey:

Dashboard	What it answers
Social and Distribution	How far content reaches and how audiences engage, by network and content type
Conversions: Forms and Landing Pages	Which forms and pages turn visitors into leads
Marketing Funnel Performance	How demand moves from traffic to MQL, opportunity, customer, and revenue
Multi-Touch Content Influence	Which content assets contribute to pipeline across the full journey, not just the last click

CRM data structure. I designed a two-level list structure in Dynamics 365 for partner-sourced leads. Level 1 list codes identify the partner and Level 2 segments separate new from matched companies. Sales can pull any partner, any segment, or both combined, with a date stamp on every assignment. I also scoped the HubSpot to Dynamics consent sync and recommended the integration path, since the CRM is the source of truth.

Results

- 100% of HubSpot forms now pass source attribution to the CRM.
- One UTM convention in use across the full marketing team.
- Leadership has four live dashboards covering reach through revenue.
- More than 30 initiatives are sequenced into 6 waves instead of competing requests.

UTM compliance, January to October 2026 (1,228 in-scope emails):

Measure	Result
Compliance before launch	0%
Compliance since launch	53.1%
Best month (August 2026)	80.9%
Average, most recent four months	65.7%
Post-launch leads with compliant tracking	48.4%

5. Replacing a webinar platform that ran 103 sessions a year

Client: National B2B industry association and media company
Role: Director of Marketing Operations
Tools: GoTo Webinar (incumbent), HubSpot, vendor evaluation

The challenge

The webinar program was large but stuck on a platform that limited it. Replays could not go out right after a live session. The team could not pull deduplicated monthly registrant counts. And the platform did not connect natively to HubSpot, where follow-up happens.

Baseline (trailing 12 months, August 2025 to August 2026)

Metric	Value
Sessions	103
Registrants	4,190
Attendees	1,180
Attendance rate	28%

With 72% of registrants missing the live session, a fast replay was the biggest lever for reaching them.

What I did

I set two hard requirements before looking at vendors. First, the session must flip to on-demand the moment it ends, so the replay goes out at once. Second, the registration URL and the replay URL must be the same link. Native HubSpot integration was required to drive follow-up workflows. Budget was anchored to current platform spend.

I compared candidates against those requirements and recommended Contrast in a written memo to leadership. I confirmed pricing from the vendor's pricing page and built a budget proposal with two cases:

Case	Tier	Monthly cost (billed yearly)
Favorable	250 registrants per session	$179
Worst case (requested)	600 registrants per	$419

Case	Tier	Monthly cost (billed yearly)
	session	

Results

- A recommendation memo with a defined budget range, from $179 to $419 per month.
- A replay path to reach the 72% of registrants who did not attend live.
- Webinar registrations flow into HubSpot for automated follow-up.

6. Collectibles retailer: 25% revenue growth, then a 10,468-post replatform

Client: Collectibles e-commerce retailer with a blog and podcast
Tools: SEO, retargeting, WordPress, WooCommerce, Shopify, Matrixify, PayPal, Authorize.net

Phase 1: Growing revenue while cutting ad spend

The store relied heavily on paid ads. I built a content marketing strategy around its large blog archive, paired with SEO and retargeting campaigns. Within six months, paid ad spend fell 35% and annual recurring revenue rose 25%.

Phase 2: Moving the store to Shopify

The client moved to Shopify to make payments and store management easier. The old site carried years of content that drives organic traffic, so none of it could be lost.

Asset migrated	Volume
Blog posts, with images rehosted	10,468
Podcast episodes (MP3)	about 244

I ran the migration through Matrixify, mapping the WordPress export to Shopify's blog format. Images were rehosted, not just linked, and comments were turned off on the new blog per the client's direction.

Phase 3: Recovering from a payments rejection

In July 2026, Shopify declined the store's Shopify Payments application as "high risk." Shopify would not count the old site's PayPal history. A second processor approved the gateway but returned a website compliance checklist before granting a merchant account.

I built a three-step plan so the launch did not stall:

1. Launch on PayPal Express with guest checkout working.
2. Clear the compliance checklist to qualify for a merchant account.
3. Reapply to Shopify Payments once the new store had history.

Results

- 35% lower paid ad spend and 25% higher ARR within six months of the content strategy.

- 10,468 posts and about 244 podcast episodes moved with images intact.
- The store launched on schedule on PayPal Express instead of waiting on approvals.
- Shopify Payments is now approved and active, and the client is happy with the new site.

First 10 days on Shopify (September 22 to October 1, 2026):

Measure	Result
Paid orders	248
Revenue	$20,950
Average order value	$84.48
Unique customers	213
Customers who ordered more than once	31
Items sold	656

[Add before publishing] A short client quote.

7. Outbound rebuild: 27,000+ emails at a 51% open rate, 60% less manual work

Client: Patient-handling medical device company
Tools: Apollo, Outreach.io (retired), Dynamics 365, Python, pandas

The challenge

The sales team prospected from scattered lists in a tool that required heavy manual work. Contact data was inconsistent, and email deliverability had no formal setup. A small calling team had uneven output and spotty CRM records.

What I did

Platform migration. I moved the outbound stack from Outreach.io to Apollo, rebuilding sequences, personas, and tagging.

Campaigns. I built 29 sequences aimed at five buyer personas, with A/B testing and copy written for each segment.

Database. I built a 44,900-contact prospect database across 22 market and conference segments. Python and pandas handled deduplication, enrichment, fuzzy matching, and validation against CMS data.

Deliverability. I set up SPF, DKIM, and DMARC, ran domain warm-up, and aligned sends with CAN-SPAM and TCPA rules.

Calling team. I onboarded new callers on Apollo's power dialer and a gatekeeper playbook. In week one, one new caller logged 136 calls in three days, and the team held a 10% answer rate. I flagged that 124 of 182 calls had no disposition and made logging a standard, because it feeds executive reporting.

Annual review. I analyzed a year of open, lost, and won opportunities, meetings, and call recordings. The review tied each proposed action to a specific challenge, including a DME dealer campaign and caller retention fixes.

Results

Metric	Result
Manual outreach time	Reduced by more than 60%
Emails sent	27,000+ across 29 sequences
Open rate	51%
Prospect database	44,900 contacts in 22 segments
List accuracy and outreach precision	Improved by more than 40%
Calling team answer rate, week one	10%

Trailing 90 days (August to November 2026): 31,344 emails sent at a 62.7% open rate account-wide, about 49% with image-prefetched blasts set aside. The largest nurture cadence delivered 3,049 emails at a 51.6% open rate.

Full program, March to November 2026 (from Apollo):

Measure	Result
Emails sent	80,312
Contacts emailed	22,478
Open rate (of delivered)	58%
Meetings scheduled	373
Calls made	7,843
Calls connected	629 (8%)

8. Building 55,000+ care provider records from public data

Client: Patient-handling medical device company
Tools: Python, state provider directories, NPPES, CMS data, Apollo, ZoomInfo

The challenge

The client sells to care providers that commercial databases cover poorly, such as intermediate care facilities, respite care, and in-home caregivers. Buying lists returned thin, outdated contacts. The team needed complete, verified contact data by provider type in each target state.

What I did

I built a Python pipeline that pulls provider records from public state directories and care listing sites. It enriches each record with phone, website, and email, then labels how much each email can be trusted.

- **Verified emails** come from authoritative sources such as state data and NPPES Direct Messaging endpoints, with junk and tracking addresses filtered out.

- **Guessed emails** use each organization's own pattern. The dominant pattern (first initial plus last name) came from 216 real name-and-email matches across 225 domains.
- **Fallbacks:** up to five alternate addresses per record, with a clear send-and-step-down rule for bounces.

For clinical research targeting, the pipeline also matches Apollo exports to ClinicalTrials.gov by trial number. When closed trials stopped publishing contacts, I switched to the trial's listed officials from the v2 API.

Results: Pennsylvania dataset

Provider type	Records	Any email
ICF / IDD residential	4,546	2,367 (52%)
In-home caregiving	1,906	639 (34%)
Skilled nursing	1,652	670 (41%)
Nursing services	1,258	180 (14%)
Personal care assistance	1,173	352 (30%)
Physical therapy organizations	770	383 (50%)
Respite care	489	280 (57%)
Total	**11,794**	**4,871 (41%)**

Phone coverage reached 11,473 records (97%), and 2,995 records carry a verified email.

Results: all three data builds

Data build	Unique providers	With any email
Pennsylvania public data	11,794	4,871 (41%)
Ohio developmental disabilities directory	41,022	37,855 (92%)
Pennsylvania commercial care listings	2,608	842 (32%)

- More than 55,000 provider records across the three builds, before removing overlap between the two Pennsylvania sets.
- Enrichment lifted email coverage on the Pennsylvania ICF file from 22% to 52%.

9. Enterprise demand generation: $2M in one year and a share of $8M in revenue

Client: Global industrial test and measurement manufacturer
Role: Email Marketing Automation Specialist, 2018 to 2023
Tools: Oracle Eloqua, Salesloft, Salesforce, Unbounce, Power BI

The challenge

The company's maintenance and reliability software lines needed new pipeline from industrial buyers. Marketing, sales, creative, and web teams worked in separate lanes. Campaigns had to reach construction, manufacturing, and automotive buyers with messaging that fit each industry.

What I did

Targeted business development campaign. I combined email marketing, Salesloft cadences, and cold outreach into one coordinated program. I managed scope and milestones across industries.

Cross-sell email program. I built a cross-sell campaign in Eloqua, aligning sales, product, and creative teams on one message.

Demand generation. I ran multi-channel automation campaigns across three software products, using Agile methods for iterative improvement.

Results

Program	Result
Business development campaign	200% of MQL target and 225% of SQL target
Business development campaign	$2 million in revenue in one year
Cross-sell email campaign	45% open rate, 15% click-through rate
Cross-sell email campaign	$500,000 in cross-sell revenue
Demand generation	MQLs up 25% and SQL conversion up 12% year over year
Demand generation	Contributed to $8 million in revenue

10. Small business growth results

Four shorter engagements, each with a measured outcome.

Client type	Work	Result
Podcast-led subscription business	Email and podcast strategy in ActiveCampaign	35% open rate, 8% CTR, 200% year-over-year ARR growth
Tech startup	Email and social media strategy with structured workflows	45% open rate, 8% CTR, 20% database growth in seven months
Mobility scooter business	SEO on Shopify	50% more organic traffic, 30% more bookings
Sports fan media brand	Social media and	350% follower growth

Client type	Work	Result
(see case study 13)	affiliate partnerships	in one year

11. Two reviewers, 7,669 contacts, 42 opportunities in the CRM

Client: Patient-handling medical device company
Tools: Apollo, Python, Dynamics 365, classic Dynamics workflows

The challenge

The sales team had thousands of clinical contacts, and two sales leaders each had their own criteria for who mattered. A single blended score would have buried one view. The team also needed the winners to land in the CRM as real opportunities, not another spreadsheet.

What I did

Two independent scores. I scored 7,669 contacts against two separate models, one built from each sales leader's criteria. Each model ran on its own, so neither view watered down the other.

Consensus tiers. I compared the two outputs and sorted contacts into three groups: high on both models, high only on the first, and high only on the second. That made the conversation about who to pursue fast, because agreement was visible at a glance.

Wave rollout. Instead of dumping everything into the CRM at once, I planned three waves. Wave 1 went first so the team could work it before more arrived.

Clean import. I solved the import problems that usually stall these projects. Affiliates of the same national organization were separated by state. Shared office phone numbers that triggered duplicate warnings were blanked on retry files. Duplicate detection rules were adjusted for shared websites. Seven contacts were folded into opportunities that already existed instead of creating duplicates.

Automatic stakeholder links. I built a real-time workflow that creates a stakeholder connection record whenever a primary or secondary contact is added to an opportunity. Every deal shows who is involved without manual linking.

Results

Measure	Result
Contacts scored	7,669
High on both models	122
High on the first model only	50
High on the second model only	109
Wave 1 imported to the CRM	60 contacts across 30 organizations; 42 opportunities created, 24 still open
Existing opportunities enriched instead of duplicated	7 contacts folded in

- 281 contacts (3.7% of the file) scored high on at least one model, so reps start from a short list.
- Waves 2 and 3 hold 79 perfect-score contacts and 142 more high scorers for ongoing nurture.

12. The website and the pipeline were talking to different people

Client: Patient-handling medical device company
Tools: Apollo website visitor tracking, Python, Excel, Dynamics 365

The challenge

The company could see which organizations visited its website each week, but the data was a raw export. Sales had no way to tell which visitors mattered, which were already customers or deals, and which were noise. The same companies were reviewed again every week.

What I did

A weekly visitor report. Each week's export is split into new and returning visitors and sorted by clinical vertical. In-vertical companies are ranked so the strongest show first.

A labeled company registry. Sales reviews each new company once and labels it with one of four groups: Current Ops (an existing deal, lead or account), Keep on Radar, Fit Not Focus, or Not a Fit. Labels are saved to a registry and applied automatically every week after. Only companies the registry has never seen land in the review queue.

A pipeline reconciliation. I matched the registry against an export of every open opportunity in the CRM. That added 91 real accounts as Current Ops and filtered out placeholder records that were people, not companies.

The finding

Only 12 of the 116 accounts with open deals appeared among that week's website visitors. The website and the sales pipeline were reaching almost entirely different organizations. It showed the site is mainly a source of new demand, and that open deals are an audience the site is not yet reaching.

Results

Registry group	Companies
Current Ops	137
Keep on Radar	33
Fit Not Focus	60
Not a Fit	971
Total labeled	**1,201**

- Weekly review now covers only companies the team has never seen.
- 971 companies are filtered out automatically every week.
- Keep on Radar companies are getting their own nurture sequence.

Adding person-level tracking:

Measure	Result
Companies identified by the tracking pixel (cumulative)	764
In-vertical companies	71
People identified (trailing 90 days)	559
People at in-vertical companies	70
Opportunities created from visitor traffic	23, with 13 still open

13. A one-person fan media brand that publishes like a newsroom

Client: Sports fan media brand (founder-operated)
Tools: Meta Graph API, Python, ffmpeg, Whisper, Canva, Cloudflare Pages

The challenge

The brand competes for attention with full media teams, and it is run by one person. Breaking news goes stale in minutes. Every graphic, reel and post had to be produced, branded and published without a production staff.

What I did

Automated publishing. I built a pipeline that publishes straight to the brand's Meta accounts through the Graph API, so posts go out without manual uploads.

Automated video. A reel pipeline uses ffmpeg to cut vertical video and Whisper to generate captions automatically.

A breaking news workflow. Templates, badges and the publishing pipeline combine into a 15-minute turnaround from news to published post.

A design system. Three locked visual concepts cover stat cards, game-day posts and news updates, built in Canva and Python. Every post looks on-brand without designing from scratch.

Growth and monetization. Strategic partnerships and organic promotion grew the audience. Sponsorship and affiliate deals support monetization.

Results

Measure	Result
Follower growth	350% in one year
Breaking news turnaround	15 minutes from news to post
Publishing	Automated to Meta through the Graph API
Video captions	Automated

14. 13 CRM exports a day, turned into one daily report

Client: National B2B industry association and media company
Tools: Python, Dynamics 365, Power BI, Dataverse

The challenge

Leadership needed a daily view of acquisition performance across six membership and sales segments. The data lived in 13 separate CRM exports. Building the view by hand every business day was slow and error-prone.

What I did

A daily reporting script. The 13 exports are uploaded each business day and processed by a Python script into branded HTML reports.

Six segments, full funnel. Each segment tracks leads, MQLs, qualified leads, leads won, all opportunities and opportunities won. Upsell and supplier segments also track revenue against monthly goals.

Email analytics. A second pipeline produces year-over-year email performance reports by audience segment.

The move to Power BI. I am replacing the manual exports with a Power BI dashboard connected directly to the CRM's Dataverse database. A Power BI attribution dashboard also compares original and latest lead source, filterable by team.

Results

- 13 CRM exports a day processed automatically into branded daily reports.
- Six segments tracked from lead to revenue against monthly goals.
- A direct database connection is replacing exports entirely.
- About 2 hours saved every business day, roughly 10 hours a week.

15. An AI calling agent that knows who owns the deal

Client: Patient-handling medical device company
Tools: VAPI, Twilio, Dynamics 365, Webflow

The challenge

The company wanted to follow up with warm contacts and website leads at scale. Every call needed to reach the right rep, respect consent, and leave pricing and patient details to people.

What I did

Outbound agent on CRM data. The AI agent calls contacts the company has already connected with, using fields passed from Dynamics 365.

Smart routing. When a prospect is ready to talk, the agent transfers the call to the rep who owns that opportunity. Transfers happen Monday through Friday only.

Channel choice. If a prospect prefers text, the agent moves the conversation to text messaging.

Inbound coverage. A second agent answers when people call the number back, handles questions and reroutes.

Guardrails.

- Every call discloses recording.
- Agents never discuss pricing or patient specifics.
- Consent to AI calls is captured on the website forms.
- Any opportunity marked "Handling internally, no AI calling" is excluded from every call list.

Web form follow-up. A second campaign calls people who filled out the website contact form and asked to learn more.

Results

- While still in testing, the agent reaches about 200 leads per week.

16. A partner portal that tags its own orders

Client: Mobility scooter business
Tools: Shopify, Liquid, Shopify Flow

The challenge

The business serves visitors at partner venues, including a theme park, through a French-language Shopify store. Orders from each partner needed their own storefront and had to be identified automatically for fulfillment and reporting.

What I did

A custom partner portal. I built a dedicated portal page for the theme park partner in Liquid, so its visitors shop a focused storefront.

Automatic order tagging. A Shopify Flow automation tags every portal order with the partner's name. The first version matched on product title and missed orders. I switched it to match on product tags and accounted for Flow's processing delay, which can take several minutes after an order is placed.

Launch. The portal went live with the testing banner removed and checkout turned on.

Results

- Partner orders are identified automatically, with no manual sorting.
- The fix made tagging reliable by matching on tags instead of titles.
- About 50 extra orders per week through the portal, averaging $99 per order.

- That is roughly $4,950 in added revenue per week.

17. Investor and clinical outreach, segmented by where each contact came from

Client: Clinical AI startup in early cancer detection
Tools: Apollo, Python, NPPES, ClinicalTrials.gov, patent and news sources

The challenge

The startup needed to reach investors, clinicians, trial sites and researchers at the same time, with a small team. Each group needed different messages, and contacts came from very different sources.

What I did

Investor campaign. A three-email sequence to 49 life-science and angel investors, with personalized paragraphs by investor type and angle.

Five clinical sequences. Separate sequences for interventional endoscopists, trial site principal investigators, trial site coordinators, scientific contributors and general GI physicians. Contacts came from NPPES and ClinicalTrials.gov.

Segmented by source. Cold campaigns are split by how each contact was found: patent databases, news reports, or clinical trials. Each one opens with the reason that contact is relevant.

No conditional logic needed. I pre-filled subject lines and email bodies per contact in the import file, so Apollo sends the right version without complex rules.

Follow-up built for intent. A four-email sequence (Day 1, 4, 9 and 16) follows up after calls. Another fires one day after a contact crosses an engagement threshold, without mentioning tracking.

Results

- 49 send-ready investor contacts in a personalized sequence.
- Five clinical audiences, each with its own sequence.
- Three sourcing-based cold campaigns.

18. Sender compliance from 48% to 84%

Client: National B2B industry association and media company
Tools: Dynamics 365, Excel, HTML dashboards

The challenge

Email Sending Guidelines only help if teams follow them. After the guidelines launched, leadership needed proof that sender names were actually changing, and a way to see who was still off-standard.

What I did

Clear scoring rules. Every send is scored against written rules. Personal sends use the approved "[Full Name] at [Company]" format. Event sends use one approved event format. Team names in the sender field are non-compliant, with one approved exception.

A recurring compliance report. Built from the CRM's full email export, it includes a manager dashboard, an executive snapshot and a spreadsheet of non-compliant sends by sender.

Before and after. A fixed baseline window (September 2025 to February 2026) is compared against the period since launch.

Governance. The rules sit inside an eight-section governance document with an owner and a quarterly review.

Results

- After launch, compliance improved and team-name sends declined.
- Leadership gets a recurring, measurable view of sender compliance.

Measure	Result
Emails reviewed	4,766
Compliance in the audit window (Sep 2025 to Feb 2026)	48.4%
Compliance since the audit	63.4% (up 15 points)
Most recent four months (Jul to Oct 2026)	About 84%, the best on record
Target	85%
Sends using team names	27%, down to 7% recently
Sends using bare personal names	19%, down to 8% recently