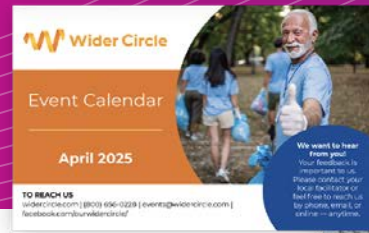


CASE STUDY



Personalized Newsletters Are a Healthy Choice



Wider Circle

Saved Time

Over Old Manual Processes



Increased Event Attendance

With Regular Newsletter



About

Wider Circle is a neighborhood-based health organization that empowers members of the same community to live happier, healthier lives.

They offer peer-to-peer social programs that encourage engagement in health and aim to remove barriers to social connection.

Industry

Healthcare Services

Platform

Salesforce Marketing Cloud

Audience

Medicare-eligible Members

Introduction

Wider Circle, a peer-based community health organization, partners with health plans and providers to bridge the last mile of healthcare for their members. By building neighborhood groups and fostering peer-to-peer engagement, the organization aims to restore essential community support networks, improve social determinants of health, and deliver a better member experience—all while lowering healthcare costs.

Challenge

For Wider Circle, engaging its older, Medicare-eligible population posed a unique challenge. Most members are not technologically savvy and rarely use the organization's app or online portal to access information about upcoming events. "We have very little Medicare-member activity in the Medicare portal for the events we offer," said Jamie Zale, programming manager at Wider Circle. As a result, a monthly printed and mailed newsletter became the primary way members learned about local and virtual events tailored to their needs.

But customization was key. With more than 900 events—mostly in California—Wider Circle needed to ensure that each newsletter was fully personalized based on a member's eligibility and location. "Every single person gets a fully customized newsletter," Zale explained. The process was complex, and before automation, it was also highly manual and time-consuming.

Solution

Initially, the team created newsletters manually, building them plan by plan and event by event—a process Zale described as "crazy time-consuming." The turning point came with the adoption of PFL's automated print and mail solution, integrated with Salesforce Marketing Cloud and AWS. Now, field teams enter event information into Salesforce, which syncs with AWS to create a data sheet for each member. "Our data team does so much great work, to be able to pull these events and go through them. And that way we are able to work with the PFL team in an easy, seamless process," Zale said.

The process is meticulous: Events are first sorted by each member's facilitator, then by virtual and in-person event options within a 30-mile radius. "Theoretically, every single person should have a fully different newsletter with different events highlighted—unless you are on the same plan and the same household," Zale noted. After internal review, the data is uploaded to Marketing Cloud, where journeys are activated and proofs reviewed before final production and mailing.

The Result

Today, Wider Circle mails out roughly 18,000 personalized newsletters each month. This is the result of a highly scalable process with PFL that ensures every member receives information relevant to them. "As long as you have the structure set up and in place, it's an easy-breezy project. It's all about making sure you put the work in the beginning for the setup," Zale advised.

The impact is clear in event attendance. "Attendance has increased since we began printing and mailing the newsletter," Zale reported. The newsletter is now the main way members discover events. What's more, the team gets immediate feedback if there are any errors or delivery issues. "When there's an issue in the newsletter? Everyone tells us," Zale said, underscoring the importance of the communication channel.

For other organizations considering a similar approach, Zale's advice is straightforward: "Make sure you have the structure and process on the back end set up for it. And PFL is a great partner to work with. When I first started here, a year and a half, I took on the newsletter pretty right away, and, I'm not going to lie, it was a chaotic process. Now I know that, once it's in your hands, we don't have to worry whatsoever. It's a smooth process."

Through thoughtful data integration and automation, Wider Circle has transformed a once-manual process into a seamless, scalable solution, ensuring every member stays connected and engaged with their community—and healthier as a result.



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—Jamie Zale, programming manager at Wider Circle