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Harnessing the Power of CRM in Healthcare

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The 5 C's

Capitation

Consolidation

Coordination

Competition

Consumerism

Patient Engagement Challenges

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"We have 20 different service lines and none of them engage with a patient in the same way"

"Most of our calls are about forgotten passwords"

"We take good care of you when you're here, but not before"

"A single source of truth is a moving target"

"Our service lines do not have input on marketing campaigns"

"We seem to fail at the human aspects [of communications]"

"We don't know who's talking to the patient and whether the patient is happy with the last interaction"
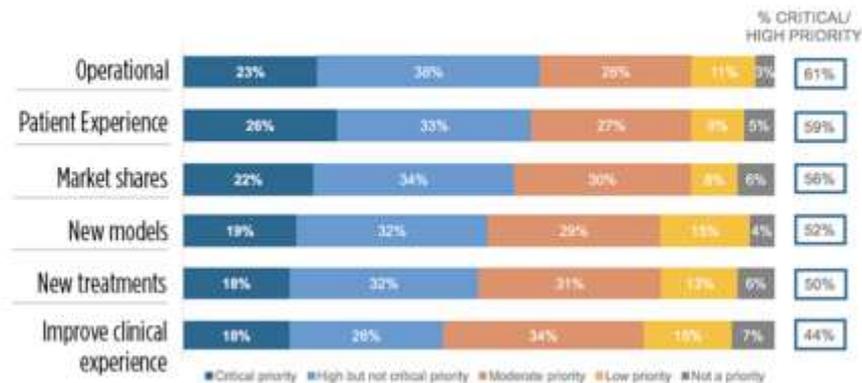
"A patient can get 8 different communications for 1 visit… none of them synchronized"

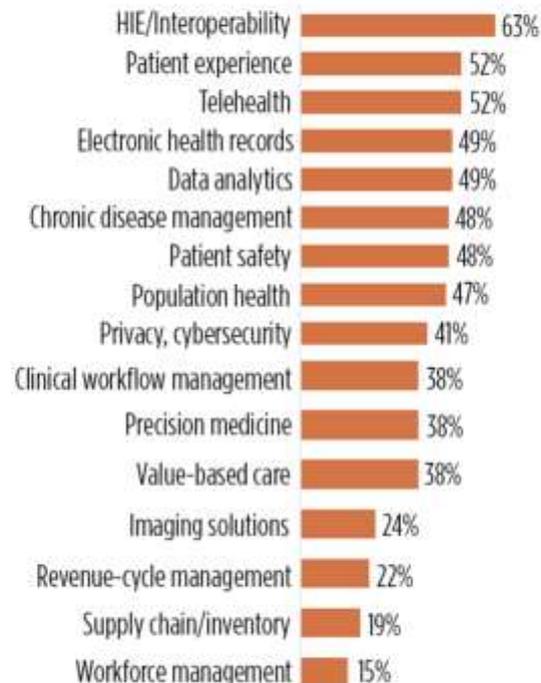"We can't keep the patients we have, we don't need more leads in the funnel"

"Our portal needs help"

"Our patients love our doctors but they don't love our customer service"

Patient Engagement Tops Innovation Needs

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What are the top innovation priorities in healthcare?

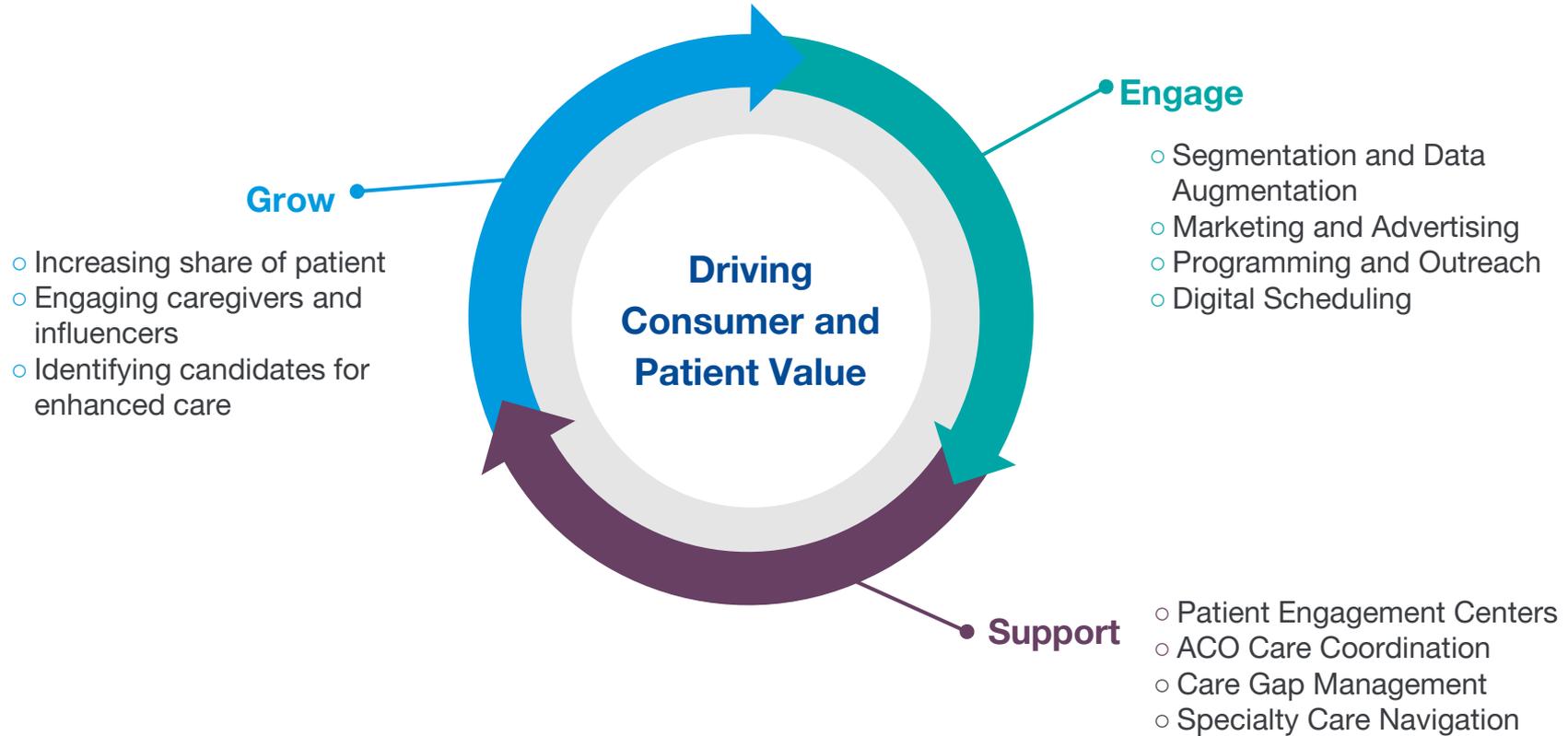|	Critical priority	High but not critical priority	Moderate priority	Low priority	Not a priority	% CRITICAL/ HIGH PRIORITY
Operational	23%	38%	26%	11%	3%	61%
Patient Experience	26%	33%	27%	9%	5%	59%
Market shares	22%	34%	30%	8%	6%	56%
New models	19%	32%	29%	15%	4%	52%
New treatments	18%	32%	31%	13%	6%	50%
Improve clinical experience	18%	26%	34%	15%	7%	44%

Source: Technology Innovation in Healthcare Survey, HIMSS Media

Where is technology innovation most needed in healthcare?

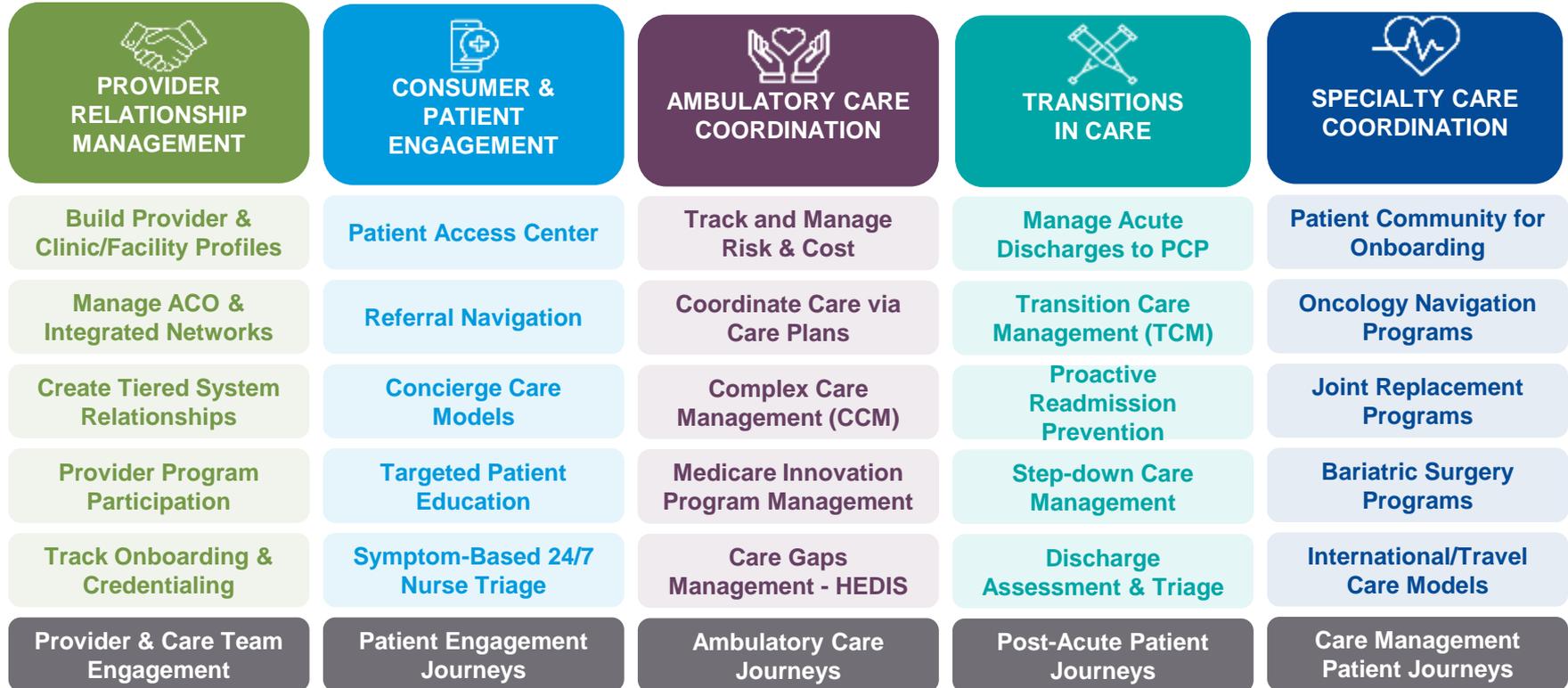|	
HIE/Interoperability	63%
Patient experience	52%
Telehealth	52%
Electronic health records	49%
Data analytics	49%
Chronic disease management	48%
Patient safety	48%
Population health	47%
Privacy, cybersecurity	41%
Clinical workflow management	38%
Precision medicine	38%
Value-based care	38%
Imaging solutions	24%
Revenue-cycle management	22%
Supply chain/inventory	19%
Workforce management	15%

Source: Technology Innovation in Healthcare Survey, HIMSS Media

The Key to HLS Revenue Generation and Patient Satisfaction

Driving Consumer and Patient Value

Engage
- Segmentation and Data Augmentation
- Marketing and Advertising
- Programming and Outreach
- Digital Scheduling

Grow
- Increasing share of patient
- Engaging caregivers and influencers
- Identifying candidates for enhanced care

Support
- Patient Engagement Centers
- ACO Care Coordination
- Care Gap Management
- Specialty Care Navigation

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How Do You Enable Patient Engagement Success?

PROVIDER RELATIONSHIP MANAGEMENT	CONSUMER & PATIENT ENGAGEMENT	AMBULATORY CARE COORDINATION	TRANSITIONS IN CARE	SPECIALTY CARE COORDINATION
Build Provider & Clinic/Facility Profiles	Patient Access Center	Track and Manage Risk & Cost	Manage Acute Discharges to PCP	Patient Community for Onboarding
Manage ACO & Integrated Networks	Referral Navigation	Coordinate Care via Care Plans	Transition Care Management (TCM)	Oncology Navigation Programs
Create Tiered System Relationships	Concierge Care Models	Complex Care Management (CCM)	Proactive Readmission Prevention	Joint Replacement Programs
Provider Program Participation	Targeted Patient Education	Medicare Innovation Program Management	Step-down Care Management	Bariatric Surgery Programs
Track Onboarding & Credentialing	Symptom-Based 24/7 Nurse Triage	Care Gaps Management - HEDIS	Discharge Assessment & Triage	International/Travel Care Models
Provider & Care Team Engagement	Patient Engagement Journeys	Ambulatory Care Journeys	Post-Acute Patient Journeys	Care Management Patient Journeys

Engaging Patients with Health Cloud

"The only effective solution is one that transcends the EMR and facilitates collaboration between clinicians within and across different organizations."*

Health Cloud Solution Goals

- Establish a holistic Patient Profile
  - Demographics
  - Preferences & Social Determinants
  - Prior Calls, Communications, and Inquiries
  - Past Appointments and Encounters
  - Conditions, Barriers to Care, and Gaps in Care

- Integrate with multiple systems

- Create a consistent experience for all agents, managers, and nurses across call centers and locations

- Drive a more engaging, nuanced, and personal patient experience by quickly referencing past touchpoints

- Develop insights into trends & exceptions, so leaders may consider where to improve operational performance

- Create foundation for patient segmentation to drive digital engagement

* HIMSS, August 2018, "Reimagining the Role and Function of Clinical Communications in Care Delivery"

Establishing a Patient Journey based Framework

Your **Provider Marketing Automation** approach must address several critical areas of patient outreach:

On-Boarding	Family Health Management	Outreach Programs	Ongoing Patient Care	Internal Cost Reduction & Channel Management
○ Welcoming new patients into the practice and ensuring key information is up-to-date 　○ Welcome email series 　○ Secure patient portal ○ Introducing patients to scheduling and appointment options and alerts 　○ Email 　○ Mobile ○ Capturing key health and insurance information to ensure seamless service 　○ Secure portals 　○ Automated reminders of expired information ○ Service Line Onboarding	○ Patient segmentation and disease state awareness 　○ Seminars 　○ New treatment options 　○ Healthy lifestyle communications ○ Family Health Management 　○ Caregiver portal access ○ Health Management Reminders 　○ Recurring Appointment Reminders 　○ Medication refill reminders ○ Electronic Bill Delivery ○ Payment Confirmations ○ Estimated Procedure Cost & Co-pay Communications	○ Condition awareness and screening 　○ Seminars 　○ Downloadable content 　○ Pre and post seminar journeys 　○ Care gaps ○ Specialist Referral Communications ○ Provider Event Communications ○ Specialist Recruiting ○ Candidate patient conversion 　○ Traditional media to digital 　○ Social media advertising	○ Post Call-Communications 　○ Follow Up Content 　○ Phone-scheduled appointment confirmations ○ FAQ and Protocol ○ Milestone-driven journeys by service line ○ Communications 　○ Reimbursements 　○ Screening Procedures ○ Educational Content and Communications ○ Healthy Living Content 　○ Recipes 　○ Exercise Plans	○ Custom Preference center that allows content to be delivered via: 　○ mail 　○ email 　○ text 　○ in app push 　○ Social ○ Redirection of mail based content to portal, email or in app for cost reduction

Patient Engagement with Marketing Cloud

"It seems people engagement might be more fitting, as it is rare that the patient is navigating his or her health alone.*"

Marketing Cloud Solution Goals

- Align patient acquisition and patient loyalty or navigation journeys

- Identify key actors/personas and establish specific patient, or diagnosis, specific journeys

- Track patient/caregiver communication across your network in one system and associate to a patient – clinical, non-clinical, and corporate

- Better coordinate communications so they are part of a "journey" vs ad hoc; consider the patient's experience, not solely the communication need

- Provide more timely and relevant communications

- Align communication to "best" or "preferred" channel

- Create milestone-driven journeys integrated with Health Cloud

- Utilize cloud pages to acquire patient data that updates Health Cloud

* NEJM Catalyst, May 2017, "Patient Engagement versus Patient Experience" - Adrienne Boissy, MD, Cleveland Clinic

What It Takes to Succeed

A New Approach to Data

○ Bespoke, not one-size-fits-all
○ The right tools for data management

Unleashing the Power of Automation

○ Minimize manual deployments
○ Focus on personalization and responsiveness

A Seamless Patient Experience Across All Channels of Engagement

○ Marketing
○ Patient and Caregiver Support

Where Do You Start?

## Distillation of CRM and Marketing Automation Blueprints Into Actionable Roadmaps

o Patient Retention

o Provider Relationship Management

o Consumer and Patient Engagement

o Ambulatory Care Coordination

o Transitions in Care

o Speciality Care Coordination

o Patient Acquisition

Ten Keys to your CRM Journey Success

Silverline's **10 Keys to Journey Success** represent the critical success factors that separate successful CRM programs from the rest.

You must ensure the critical success factors are in place and make certain their transformational benefits are fully realized.

Midwest University Based Health System
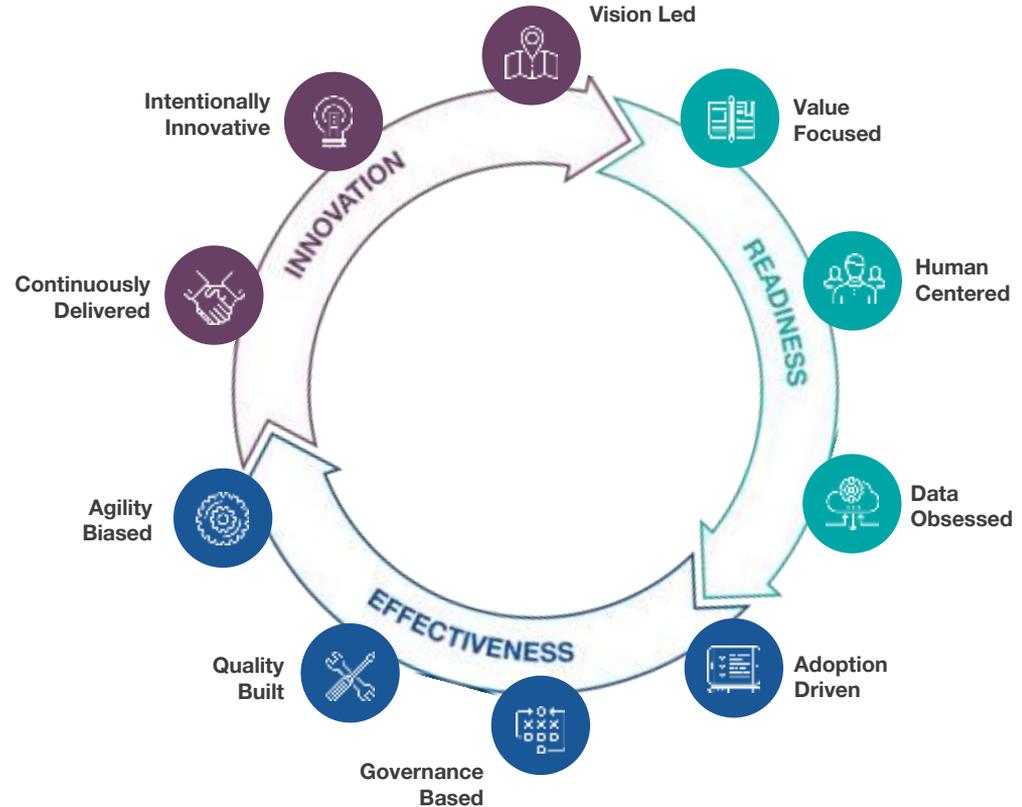
Challenge

○ The client needed a place to centralize data to gain a holistic view of the patient.

○ HIPPA and PII regulations made it impossible for marketers to segment audiences for targeted, personalized messaging with its data structure.
Attribution of marketing efforts for increased services were lacking.

Solution

○ Silverline implemented a solution that includes Service Cloud and Marketing Cloud Connect.

○ Patient data coming from the client's Enterprise Data Warehouse is masked and bucketed into attributes that marketers use to segment without compromising PII laws and HIPPA Regulations.

○ Data that was made available to Marketing Cloud now drives personalized journeys based on individuals health needs.

○ Visibility is given into consumer and patient panels, allowing marketers to concentrate efforts on conversions to new patients and keeping at-risk patients.

Results

○ Reactivation for Primary Care Patients, has seen a return for patients who have not engaged in over 13 months.

○ The journey has resulted in a conversion rate of over 2.5% and a conversion milestone rate of 7%.

○ The marketing team has gained the ability to create unique, personalized journeys for each of its patients.

This client is one of the largest provider networks in the Midwest. Recent exponential growth of patients along with acquisition of multiple network facilities and providers made it difficult to carry out its mission of Whole Person Care with a Personalized approach.

Largest New York Based Independent Physician Organization

Challenge

- No single source of trust used to engage the patient.

- Lack visibility into what's happening with their patients, when and where are they going.

- Leverage multiple systems that all coordinate with a patient without visibility.

- Patient love doctors but not customer service.

Solution

- Silverline implemented a solution that includes Health Cloud and Marketing Cloud Connect.

- Patient data coming from the client's EHR and scheduling system used to create 360 Degree View of the patient (Demographics, Preferences & Social Determinants, Prior Calls, Communications, & Inquiries, Past Appointments, Gaps in Care

- Create a consistent experience for all agents, managers, and nurses across call centers and locations

- Leverage Marketing Cloud to better coordinate communications to patients so they are part of a "journey" vs ad hoc; consider the patient's experience, not solely the communication need

Results

- Initial journeys around prescription fulfillment has significant decrease in contact center calls

- Focused communications to patients

- Maximize time on phone with patients to solve multiple issues

This client is one of the largest Independent multi-speciality Group in NY. They have over 40 locations in 5 counties, have over 560 providers and treat over 500K patients a year. They have two dedicated call centers and are part of the Nextgen ACO.

Silverline Fast Facts

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350+	1,100+	175	400+	4.8/5	2009
Resources	**Salesforce Projects**	**Assets & Accelerators**	**Salesforce Certifications**	**Customer Satisfaction**	**Founded**

Locations
- Headquartered in NYC
- Offices in Chicago, Orlando, Omaha, Minneapolis and Bangalore (India)
- Resources around the globe

Expertise
Healthcare
- Provider
- Payer
- Biotech/Life Sciences
- Medical Device

Financial Services
Platform

Accolades

glassdoor 2019 BEST PLACES TO WORK

CRAIN'S 2017 best places to work in NYC

Deloitte. Technology Fast 500

AMERICA'S FASTEST-GROWING Inc. 5000 PRIVATE COMPANIES

Inc BEST WORKPLACES 2017

PARTNER INNOVATION AWARDS 2018 WINNER

Salesforce Certifications

salesforce appexchange program partner

salesforce product development partner

salesforce platinum consulting partner

salesforce health cloud pilot partner

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Thank You

Questions?