

2020 and the state of healthcare consumer engagement

How necessity and technology are transforming the patient experience









Executive summary

The patient experience has been a top priority for hospital and health system leaders for years. However, the rise of healthcare consumerism has challenged the status quo understanding of what truly patient-centric care is. Many leading hospitals and health systems, including Clearwater, Fla.-based BayCare, are meeting the call to deliver patients more convenience, transparency and personalization, which has become even more urgent as America's hospitals work toward financial recovery and continued surge preparedness amid the COVID-19 pandemic. This white paper is based on interviews conducted in Spring 2020 with leaders from BayCare as well as leaders from the healthcare and technology companies Cerner and Salesforce.

The current patient engagement landscape

People don't often associate healthcare with convenience or transparency. These are traits more befitting of industries like online retail, banking and hospitality. However, for years, industry thought leaders have clamored for healthcare to become more patient-centric and embrace the tenets of consumerism. Many leading hospitals and health systems are working toward this mission and beginning to crack the healthcare consumerism code, offering an experience that more closely aligns with what patients want from their healthcare interactions.

The need for this transformation is well documented. For example, in a <u>study</u> published in 2016 conducted

by Prophet, 81 percent of consumers surveyed said they were unsatisfied with their healthcare experience. Shifting expectations, especially among younger patients, contribute to the nation's dissatisfaction with healthcare interactions. In recent years, consumer expectations have been shaped by the unprecedented convenience and personalization offered by companies like Amazon and Netflix.

Traditional models of care simply don't offer the type of engagement healthcare consumers want. According to a <u>study</u> published by Accenture in 2019, consumers are increasingly looking for their providers to offer digital capabilities. For example, from 2016-19, the percentage of patients who were more likely to choose a provider if they offered text or digital reminders for appointment or care updates increased from 57 percent to 70 percent.

The direction in which healthcare must move is clear, and the stakes are high. Engaged patients are more likely to adhere to established best practices for their own care, which is especially important for older populations and patients living with chronic conditions that require more regular screenings and treatments. Closing discrepancies between recommended levels of care and the care many people receive is crucial for success of providers' population health goals. According to <u>research</u> from the Advisory Board, 15 percent to 35 percent of patients can be considered rising-risk, meaning they are living with one or more chronic conditions with symptoms that can be easily ignored. Researchers estimated 18 percent of these patients move into the high-risk category every year. High-risk patients tend to experience worse outcomes and account for a disproportionate share of medical costs.

Joshua Newman, MD, the senior vice president of healthcare and life sciences for Salesforce, told *Becker's* patient engagement is crucial to ensuring both better clinical outcomes and financial wellness for healthcare organizations.

"The most important thing in healthcare is making people healthier," Dr. Newman said. "When a hospital can guide patients along a journey, engaging them before and after they've entered and exited the four walls of a hospital, people do better clinically."

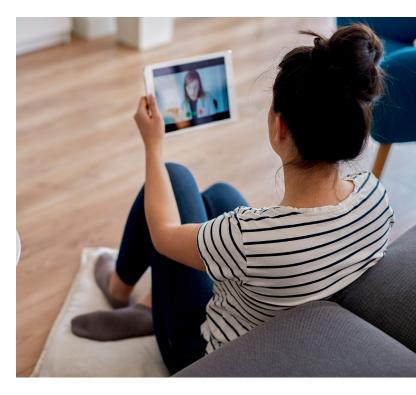
Dr. Newman added the business case for improving patient engagement efforts is twofold: brand recognition and lowering cost of care. When it comes to brand recognition, hospital leaders want their communities to view their facilities as places of healing and seek out the expertise of their providers when they need care. This level of trust occurs when facilities not only deliver excellent acute care, but also have a presence in the community and engage with individuals throughout their care journeys in a way that meets modern consumer expectations. Secondly, healthier patients are less likely to need the type of high-cost care that puts financial strain on health systems.

"By building patient engagement functions and meeting consumer demands, hospitals also might lower the total cost of providing care," Dr. Newman said. "If you can prevent missed appointments and enable patients to be more active in self-care, you can actually lower the cost of giving that care. There are business reasons and major health reasons hospital leaders should be rethinking their patient engagement strategies."

Rethinking patient engagement – The rise of clinically informed consumer engagement

While the need for stronger patient engagement is well understood, there are many barriers to achieving the levels of engagement and convenience offered in other industries. Healthcare is distinct from these industries in that it is not an elastic good or service. People generally seek healthcare services when they need them, and virtually everyone needs care at some point. This undeniable need has somewhat insulated healthcare from having to offer the same consumer-centric experiences common in other industries.

Healthcare consumerism also varies in that there are more direct stakeholders involved in the business of healthcare. The healthcare payment landscape is complicated, with hospitals reliant on both payers and patients for revenue.

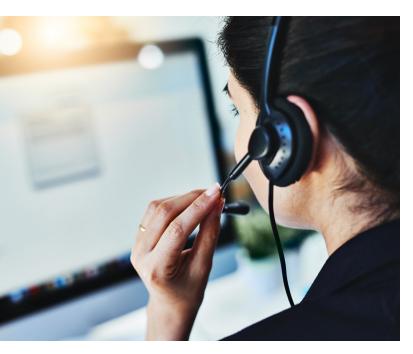


For David Bradshaw, senior vice president of consumer and employer solutions for Cerner, achieving healthcare consumerism requires synergy between payers, providers and patients – digital technology is often the glue that can bring these entities together.

"Consumerism in healthcare is really about getting these three parties together, often in a digital fashion," Mr. Bradshaw said. "Then it's about building a brand and delivering patients a consumer-centric experience."

The key to aligning these stakeholders and creating a great consumer experience lies in data. Providers and hospital leaders need technology solutions that derive sophisticated insights from both clinical and engagement data - including information regarding health, financial circumstances and communication preferences. To create such a solution, Cerner and Salesforce entered into a collaboration in 2018 to offer providers a technology solution that combines Cerner's ability to capture immense clinical data with Salesforce's customer relationship management technologies. The combined solution offers providers a holistic view of patients. With the solution, providers can find a patient's clinical status, personal profile and behavioral patterns, among other sets of information. Collectively, the data enables the creation of predictive models to help providers better anticipate patient needs, according to Peter Yates, director of Cerner HealtheCRM.

"This is about anticipating patient needs," he said. "We're calculating risks and trying to get in front



of them before a costly, acute health event or preventable complication happens."

The integration of these two data sets is also designed to yield more valuable insights in the future as the technology derives more nuanced information from identifying correlations between clinical outcomes and patient engagement data. Currently, hospitals and health systems can leverage the clinically integrated CRM solution to help inform preventive care strategies, conduct patient outreach and improve patients' experiences with contact centers. When staff can easily access appropriate information about a patient during phone and other remote interactions, the scheduling process and overall patient experience can benefit.

Empowering staff with easy-to-access, clinically-relevant information for remote patient interactions is more important than ever. When *Becker's* spoke with Mr. Yates in late April, elective procedures in many areas of the country had been postponed or canceled, high-cost centers like intensive care units and emergency rooms were overrun and hospitals around the nation were losing millions of dollars every day. To recoup expenses, hospital leaders were already beginning to think about how to work through the surgical backlog. According to Mr. Yates, the situation highlighted the promise of clinically focused CRM.

"This is a situation where we can take the clinical and the EHR transactional data and combine it with CRM data to really help our clients manage tons of interactions with a significant portion of their patients in short order and help reactivate significant parts of their business," he said.

Patient engagement and clinically informed CRM at BayCare – 5 use cases

BayCare, a nonprofit health system serving the Tampa Bay area, has embraced the clinically informed CRM and leverages the technology in several capacities. This robust, 15-hospital health system generated \$4.4 billion in operating revenue in 2019. Despite its significant resources and stockpile of internal talent, the health system's leaders recognized a great opportunity to meet the challenge of healthcare consumerism when Cerner and Salesforce collaborated to bring together their technology platforms to create a clinically informed CRM solution.

"We got a gift when Salesforce and Cerner decided to come together and integrate their technology platforms," said Tim Thompson, the health system's CIO and senior vice president. "All that integration of data would have taken our shop years to develop and implement."

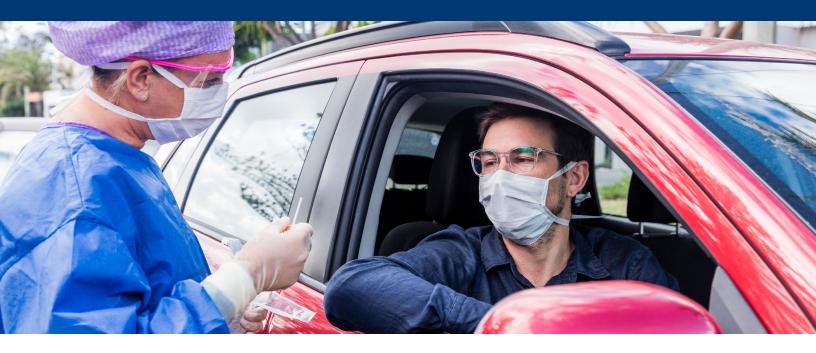
Here are five spotlights on how BayCare leverages consumer-centric patient engagement strategies and the clinically informed CRM:

1. Nursing care: Mr. Thompson said his organization saw the need to get nurses more information about their patients. This information ranges from clinical to personal. The system plans to place smart devices in patient rooms and will be able to document patient preferences for music and creature comforts, like pillow firmness.

"This information can help us make patients more comfortable when they're with us and lets them know we can relate to them and their needs," he said.

2. Contact center: One of the first implementations of the clinically integrated CRM at BayCare was in its contact centers, according to Edward Rafalski, the health system's chief strategy and marketing officer and senior vice president. BayCare now provides contact center staff with easily accessible clinical information about patients when they call, which helps these interactions feel more personalized. Additionally, these interactions can help close care gaps and streamline scheduling.

"Putting this information at contact center agents' fingertips enables them to say things like 'I see you're overdue for your colonoscopy. Can I schedule that for you now?" Mr. Rafalski told *Becker's*. "This readily available information empowers agents to be much more proactive with the consumer and anticipate what needs to happen next in their care."



3. Price transparency: To deliver patients more transparency on pricing, BayCare is establishing a central pricing office that patients can call to inquire about the cost of their care. Agents in the center have access to both patients' financial and clinical information, and they can better help patients understand their financial obligations and determine appropriate payment options. With rises in high-deductible health plans and in the context of an economic recession, Mr. Rafalski sees this as a crucial service to offer patients.

"People are having to make difficult decisions on spending right now," he said. "This [clinical CRM] tool set will enable us to more effectively help the patient plan, not just their clinical calendar, but their financial calendar.

4. Medicare Advantage: In 2018, BayCare launched a Medicare Advantage plan and has since become one of the fastest growing provider-sponsored plans in the nation, according to Mr. Rafalski. At the time of his conversation with *Becker's* in early June, the health system was preparing to leverage the clinically informed CRM to help manage care for this patient population.

"Being able to use the CRM solution and communicate with our patients regarding their health needs will become a very important tool for managing this patient groups' clinical health," he said.

5. COVID-19 response: During the initial wave of COVID-19 in the U.S., BayCare leveraged its CRM solution and other patient engagement strategies to help improve testing capacity and monitor COVID-19 patient recovery. The health system activated remote screening technology to enable nurses to walk patients through screening checklists via online chat or its contact center COVID-19 nurse

triage line. For patients with COVID-19 cases that weren't severe enough to warrant hospitalization, the CRM solution enabled providers to track patient progress as they recovered from the disease using a symptom tracker pushed to the patients with COVID-19 positive test results. The system also developed an online screening tool that patients could use independently.

CRM in the era of COVID-19

The COVID-19 pandemic is the kind of tragedy that leaves an indelible mark on history. Nearly every sector of society has been impacted, and many aspects of how we live and work will be permanently changed. With more than 147,000 deaths confirmed in the U.S. as of July 26, the true toll of human loss is immeasurable. Tragedies of this scale require transformation; it's important that society at large and healthcare as an industry ensure the changes made create lasting good.

At BayCare, leaders met the challenge created by COVID-19 with innovation. Health systems around the nation will need to do the same to recover financially and continue to deliver patients the care they need. A clinically informed CRM is among the technological innovations that can help providers navigate these difficult times. And, with virtual care here to stay, the right CRM solution can help even remote visits feel more personal.

"At one point, we went from basically zero to 2,000 virtual visits a day," Mr. Thompson said. "What excites me about technology like CRM is no matter how a provider sees a patient, they've got a more holistic view of their needs and what's going on with their health. As we continue to try to deliver care in whatever way we can, these solutions are going to become even more important."

Cerner and Salesforce collaborate to transform healthcare

Cerner and Salesforce have collaborated to develop an integrated offering to support enhanced consumer and clinician engagement, creating a clinically-informed CRM technology system that can be used across a health care delivery system's enterprise. To learn more, visit cerner.com/CRM.



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