Operationalizing CRM Technology to Transform the Healthcare Experience

Wednesday, February 13 | 2:00 – 2:45 PM | HIMSS Spot
Who we are

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Pressures Driving the Need for CRM in Healthcare

**Unsustainable Cost of Care**

Operational efficiencies that drive revenue growth while reducing cost
Pressures Driving the Need for CRM in Healthcare

Unsustainable Cost of Care

Operational efficiencies that drive revenue growth while reducing cost

Sick and Aging Populations

Interoperability and the frictionless sharing of data that enables the delivery of care anywhere, e.g., in the home, while traveling, among a coordinating care team
### Pressures Driving the Need for CRM in Healthcare

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<th>Unsustainable Cost of Care</th>
<th>Sick and Aging Populations</th>
<th>Increased competition from mergers and partnerships</th>
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<td>Operational efficiencies that drive revenue growth while reducing cost</td>
<td>Interoperability and the frictionless sharing of data that enables the delivery of care anywhere, e.g., in the home, while traveling, among a coordinating care team</td>
<td>Personalization that contributes to increase healthcare consumer loyalty and personalized experiences</td>
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What is CRM?

An organization-wide strategy for managing an organization’s interactions using CRM technologies

It is about relationships... how we establish, nurture, optimize, sustain them over time

Ultimately, it’s about increasing trust in and loyalty to the organization

“We ultimately need systems that make the right care simpler for both patients and professionals, not more complicated. And they must do so in ways that strengthen our human connections, instead of weakening them.”

- Atul Gawande, MD, MPH, from his Nov ‘18 New Yorker article, “Why Doctors Hate Their Computers”
Extending the Value of Health IT Systems with CRM Technologies

Population Health
Patient-generated Health Data
Concierge Medicine
Public Health
Donor Management
Employee Engagement
Supplier Engagement

Electronic Medical Record
Practice Mgmt
Revenue Cycle
Journey Management | Analytics

Care Management
Patient Access
Patient Services
Network Management
Outreach & Marketing

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Concierge Medicine
Employee Engagement
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Care Management
Patient Access
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Network Management
Outreach & Marketing
...and Putting the Person at the Center
The Task Force designed a set of 16 survey questions directed to stakeholders within the healthcare arena.

The goal of this survey was to assess:
1. The current state of use of CRM in healthcare
2. Attitudes towards CRM technology in healthcare

Results now available on HIMSS.org
CRM in Healthcare Survey Results

Major Findings:

- Vendors are the most likely group to report use of CRM Technology as standard practice
- Patients are the most commonly targeted group for engagement with CRM
- Outreach and Marketing is considered the most important use case for CRM to support organizational goals
HIMSS Exploring CRM Technology for Healthcare Task Force

To enable healthcare to better manage relationships with patients, providers, payers, suppliers, etc. through the effective application of CRM technologies

<table>
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<th>Use Cases &amp; Personas</th>
<th>Capabilities &amp; Requirements</th>
<th>Change Management</th>
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<tr>
<td>Identify use cases and related personas</td>
<td>Design a capability model with related glossary of terms</td>
<td>Develop a change management guide with related templates and checklists that will support the smooth adoption of CRM in Healthcare</td>
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<td>Describe relevant use cases of CRM in Healthcare</td>
<td>Describe how these capabilities can fit into the existing healthcare ecosystem</td>
<td>Design a readiness assessment that will help organizations determine how ready they are to pursue CRM-type use cases</td>
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Example Uses of CRM in Healthcare

Personalizing the Consumer Experience

- Workflow optimization
- Improve loyalty & marketing ROI

- Shared decision making
- Patient & Member Satisfaction

- Know thy Customer

Employee engagement & productivity

- 360 of Patient
- Provider credentialing and onboarding

Provider relationships & outreach

- Take action to close care gaps
- Care team collaboration

Call centers: patient and agent satisfaction

- Increase referral base & volume

Attract new patients, retain existing patients

- Support transitions of care

- Patient education

Create e-commerce marketplace

- Real-time virtual care & nurse triage call center
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<th><strong>What is a Capability Model?</strong></th>
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<td><strong>Capability</strong></td>
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<tr>
<td>● An ability that an organization, person, or system possesses. (TOGAF)</td>
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<tr>
<td>● “What” an organization does to achieve a specific purpose, outcome, value</td>
</tr>
<tr>
<td>○ Independent of “how” (e.g., resources, systems, assets, etc.)</td>
</tr>
<tr>
<td>○ Independent of “why” (e.g., strategy, financial growth, operational efficiency, patient satisfaction, etc.)</td>
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<tr>
<td><strong>Capability Model</strong></td>
</tr>
<tr>
<td>● Provides a central, functional, modular view of business processes</td>
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<tr>
<td><strong>Why are we using it?</strong></td>
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<td>● Creates a common vocabulary and view of how CRM can contribute to the healthcare ecosystem</td>
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<tr>
<td>● Provides a framework to relate use cases, requirements, and maturity models</td>
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What is a Capability Model?

Level 0: Capability Group

Level 1: Capability

Level 2: Capability Type

Specificity increases
Provider CRM Capability Model: Level 0

Outreach & Marketing
Patient Engagement
Population Health
Provider Network Management
Employee Engagement
Operations
Customer Service & Patient Access
Care Management
Provider CRM Capability Model: Level 1

**Outreach & Marketing**
- Campaign Management
- Patient Education / Wellness Promotion
- Consumer Data Aggregation
- Event Management
- Brand Management (e.g., Social Monitoring / Advertising)
- Clinical Trial Subject Recruitment

**Patient Engagement**
- Journey Management
- Activity Management
- Patient Education
- Peer Networking
- Alerts / Reminders / Pre-Visit Instructions
- On-Demand Clinical Data Access
- Patient Generated Health Data
- Patient Messaging

**Population Health**
- Patient Segmentation & List Creation
- Patient Attribution
- Population Health Program Management
- Readmission Prevention
- Registry Curation
- Surveillance

**Customer Service & Patient Access**
- Contact Management
- Scheduling / Appointment Management
- Telephone Integration
- Registration Management
- Patient Eligibility Check
- Benefits Determination & Med Authorization
- Patient Messaging
- Provider Search
- Medical Billing & Collections
- Wayfinding
- Transportation Assistance
- Preference Management
- Patient Surveys
- Patient 360 / History

**Care Management**
- Workflow Automation
- Patient Intake & Evaluation
- Care Planning
- Care Team Collaboration
- Care Transitions
- Home Health Management
- Remote Monitoring
- Patient Analytics
- Case Management
- Task Management
- Chronic Care Management
- Health Risk Assessments
- Virtual Triage / Nurse Advice Line
- Virtual Visits
- Social Support Coordination

**Employee Engagement**
- Employee Collaboration
- Employee Onboarding
- Employee Capability Tracking
- Employee Helpdesk Management
- Employee Outreach
- Employee Wellness

**Provider Network Management**
- Provider Relationship Management
- Referral Management
- Provider Recruitment
- Provider Contracting
- Provider Onboarding
- Provider Data Coordination
- Provider Community
- Provider Messaging

**Operations**
- Patient Analytics
- Procurement / Supplier Engagement
- Employee Analytics
- Call Center Analytics
- Provider Analytics
- Change Management
- Donor Management
- Emergency Response
- Inventory & Resource Management

**Provider CRM Capability Model: Level 1**
• 78 Capabilities to define (Level 0,1)
  – 8 Level 0
  – 69 Level 1
• Use as a reference when referring to the capability model
What is CRM Change Management?

“CRM change management is a formalized process of planning, communicating and implementing CRM initiatives and is designed to improve an organization’s CRM readiness, acceptance and ultimately, successful performance.”
Why is Change Management Important?

- Change management is often the defining factor between success and failure of an initiative.
- Change is inevitable and managing expectations and coordination of change is critical.
- Helps avoid “surprises” created by the changes to existing systematic roles and responsibilities.
- CRM can involve a radical departure from known processes and its impact must be anticipated & managed.
5 Core Change Management Objectives

- Help sell change to “internal customers”
- Create an appropriate infrastructure that drives management engagement
- Drive consistent and planned CRM-relevant training
- Anticipate a reconfiguration of the organization structure and performance assessment criteria
- Re-mold existing incentive systems
Change Management Engagement Tool Box

- **Building The Business Case**
  - Use Cases, KPI’s and ROI

- **Measuring Organizational Readiness**
  - How “ready for change” is your organization?

- **Develop A CRM Project Charter**
  - Don’t go to battle without a battle plan!
Real World Stories

Driving Improved Patient Access Experiences

Data-Driven B2C and B2B Marketing & Outreach
What’s coming next?

Publish Capability Model & Glossary

Publish Change Management Guide & Readiness Assessment

Draft Reference Requirements for CRM in Healthcare

Publish Three (3) Real-world Case Studies of CRM use Cases in Action
Questions?

Contact interop@himss.org to get involved!

Share your CRM Use Cases & Case Studies!