

EXECUTIVE INSIGHTS



Gozio Executive Dialogue:

FINDING THE ROI IN PATIENT ENGAGEMENT PROGRAMS

As patients become more consumer minded, marketing leaders are embracing technological and data-driven solutions that prioritize patient experience. Embracing these digital tools means first considering their overall efficacy, ROI and questions around patient data ownership.

Traditionally, health care leaders have recognized patient engagement as inherently valuable, but have not gone to great lengths to quantify that value. However, post-COVID, there is a growing need to track the return on investment (ROI) in patient engagement initiatives — especially since satisfied patients often lead to repeat visits, positive referrals and a good reputation, all of which contribute to the financial health of a provider.

As the field increasingly recognizes patient engagement as a means for cost savings or revenue generation, leaders need sophisticated tools — beyond the traditional patient portal — to measure this impact.

In conjunction with the 2023 Society for Health Care Strategy & Market Development (SHSMD) Connections annual conference, marketing, consumer experience and communications executives gathered in Chicago to discuss the need for more customizable platforms that meet patient needs and expectations while supporting clinical outcomes. They also shared insights on some of the challenges around patient data and tracking ROI around patient engagement efforts.

KEY FINDINGS

- 1 Leaders are leveling up their patient engagement platforms.** Patient engagement impacts cost and revenue, and leaders are advocating for sophisticated, customizable digital tools beyond traditional patient portals.
- 2 Adaptability matters.** There's a growing need for care platforms to adapt and evolve, offering more than just clinical data. This includes integrating wellness content, scheduling, payment options and other tools to enhance overall patient well-being.
- 3 There are new standards for patient experience.** Improving customer service and easier access to care is non-negotiable, as service issues can lead to patient attrition.
- 4 Patient experience data can guide operational goals.** It's important to use patient data to drive efficiency and better manage physician schedules. This involves balancing clinical and administrative needs with patient care.
- 5 New tools can help measure the ROI of patient experience.** Quantifying ROI in patient engagement is complex. Platforms should allow for the customization of metrics and key performance indicators (KPIs) and combine various data sources to show true impact on results.

PARTICIPANTS



MODERATOR Diane Weber

EXECUTIVE DIRECTOR

SHSMD



Melvin Bower

CHIEF MARKETING OFFICER

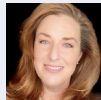
SHRINERS CHILDREN'S



Tricia Geraghty

CHIEF MARKETING AND
EXPERIENCE OFFICER

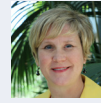
CHILDREN'S WISCONSIN



Diane McGhee

ASSISTANT VICE PRESIDENT,
STRATEGIC COMMUNICATIONS
AND OUTREACH

UT SOUTHWESTERN



Kelly Meigs

VICE PRESIDENT, MARKETING
STRATEGY AND PLANNING

TANNER HEALTH SYSTEM



Jamey Shiels

SENIOR VICE PRESIDENT, CONSUMER
AND DIGITAL EXPERIENCE

ADVOCATE HEALTH



Amy Stevens

VICE PRESIDENT AND CHIEF
MARKETING OFFICER

TIDELANDS HEALTH



Lea Chatham

VICE PRESIDENT, MARKETING

GOZIO HEALTH



Gozio Executive Dialogue: Finding the ROI in Patient Engagement Programs



MODERATOR: DIANE WEBER, SHSMD

THINKING BEYOND THE PORTAL

As patients increasingly compare their care journeys to modern consumer experiences, health care leaders now understand that a foundational digital presence is just the starting point. Leaders cited the need to provide a unified patient experience that can balance privacy with personalization and support long-term health initiatives.

SUMMARY: They discussed the merits of using mobile apps that include portal access but offer broader solutions. Such platforms can deliver wellness content, scheduling tools, payment capabilities, AI assistance, wayfinding and other mechanisms to address patients' overall health and well-being — not just their immediate clinical care needs.

Organizations with disparate patient-facing platforms often struggle to create a cohesive consumer experience, but third-party solutions can help organizations maintain their patient bases, fostering connection and loyalty over time.

KELLY MEIGS (*Tanner Health System*): Our scores for providers are great, but patients dislike other aspects of their visits, like wait times, access to appointments and scheduling. Providers often rely on good personal scores and leave the rest to operators to fix. We're working to use MyChart to increase access, texting for appointment reminders and piloting open scheduling for some practices."

LEA CHATHAM (*Gozio Health*): I find it fascinating that in the past decade, even if patients like their doctor and are satisfied with their medical care, a poor customer service experience can drive them to switch providers. Still, some health care providers believe that exceptional medical skills alone will keep patients loyal. The reality is that a bad customer service encounter, an unpleasant online experience, or an unfriendly front desk can lead to patient attrition.

GOZIO EXECUTIVE DIALOGUE:

Finding the ROI in Patient Engagement Programs

LEA CHATHAM, CONT'D (*Gozio Health*): We've worked with clients who initially engaged with us for our wayfinding solution because their surveys exposed a significant issue with parking and navigation. Patients were leaving their health system due to difficulties finding parking or navigating campuses. It goes to show that even the best medical care can't make up for a frustrating patient experience.

DIANE MCGHEE (*UT Southwestern Medical Center*): I often say that communications and marketing can't fix operational issues; marketing mainly focuses on acquiring new patients, not their journeys through the system. The fundamentals must be in place. This ties into the concept of lifetime value. If these different operational and digital elements aligned better, we could enhance the overall value and outcomes.

WHY ADAPTIBILITY MATTERS

Health systems need patient-facing platforms that change with the times, but traditional patient portals often lack connectivity with other tools and can be difficult to tailor. Leaders need customizable programs that meet patient needs while supporting clinical outcomes.

Some participants have found success with apps that can quickly integrate new features and adapt to care demands, whereas a standalone patient portal might be more rigid and slow to evolve.

Leaders discussed how such tools can personalize individual patient experiences, unlike most out-of-the-box portals, and can more easily integrate with the latest technologies (like wearable health devices) and third-party services, ensuring that patients have access to the most up-to-date tools and information.

TRICIA GERAGHTY (*Children's Wisconsin*):

We're integrating our patient education modules through a third-party platform. It helps us understand whether families are actually using the patient education that we're sending them home with. The ability to track that has been helpful internally to show actual metrics around patient education.

LEA CHATHAM (*Gozio Health*):

One thing we're exploring with some clients is customizing our app using QR codes, tailoring the content for specialized education and appointment scheduling. We're also investigating if this approach could improve outcomes.



GOZIO EXECUTIVE DIALOGUE: Finding the ROI in Patient Engagement Programs

MEASURING PATIENT SATISFACTION

Beyond medical care, customer service and simple access issues can affect patient satisfaction. As consumers compare their care journeys to standards set by businesses like Amazon, hospitals and health systems rely on patient feedback to improve the patient experience.

To this end, leaders are using a range of methods, such as using online reviews, social media comments and patient feedback surveys to obtain more qualitative, context-rich data.

Participants are particularly focused on how digital interactions affect patient and family satisfaction, which can influence revenue. Some leaders request patients' feedback about their online journey in addition to standard patient experience surveys, helping to address low ratings in online scheduling or virtual visits.

JAMEY SHIELS (*Advocate Health*):

We have many followers on social media, and we monitor patient feedback through it. People often voice concerns online instead of contacting us directly. We can't fix everything, but this feedback does give a chance to spot issues and try to resolve them.

TRICIA GERAGHTY (*Children's Wisconsin*):

We measure digital experience on our family experience survey and through that, I can show what improved.

ALIGNING PATIENT EXPERIENCE INITIATIVES WITH LARGER OPERATIONAL GOALS TO PROVE ROI

Patient portals provide valuable insights into patient preferences and behaviors, which can lead to improved outcomes. They can also reveal workforce efficiencies, streamline processes and reduce administrative burden.

While traditional EHRs often store data without analyzing it, new apps can provide insight into collected data — including health records and patient interactions — to

improve care and inform clinical decision-making. Leaders can track metrics such as wait times and ease of use to show tangible improvements in efficiency — and this can help them to set common goals across departments and measure results.

For example, if online scheduling metrics indicate that patients prefer certain times or days for appointments, physicians might offer more appointments during peak demand times. Or if online service ratings drop, leaders can use the data to make iterative changes in their processes.

Integrating these tools makes scheduling more efficient, eases administrative tasks, and helps physicians better manage their time. And showing leaders hard data encourages them to drive organizational change.

TRICIA GERAGHTY (*Children's Wisconsin*):

What motivates a busy physician to change their practice? I believe it's the data that shows the efficiency and accuracy of online scheduling, of improving provider matching, and increasing the chance that doctors see their own patients. Sometimes, we need to use marketing skills to understand our physicians' needs, remembering that these tools can make it easier to provide care for patients.

LEA CHATHAM (*Gozio Health*):

One advantage of online scheduling is that it shortens wait times for specialty appointments. On average, the wait time is 26 to 30 days, with about 20% of appointments still available during that period. The difference lies in how we allocate appointments through phone calls versus online scheduling.

MELVIN BOWER (*Shriners Children's*):

What turned the corner for us was working with leadership to show them you can have quite a bit of voice in your schedule development and how it's executed. For us there will be consistency, as a medical group, which has made a huge difference.

GOZIO EXECUTIVE DIALOGUE: Finding the ROI in Patient Engagement Programs

ADDRESSING CHALLENGES IN ROI TRACKING

Organizations are increasingly seeking ways to quantify the ROI in patient engagement programs. However, linking specific digital actions to financial outcomes remains a challenge when ROI includes efficiency and workforce improvement isn't always a direct financial measure.

To address specific ROI concerns, a platform needs to allow users to customize metrics and key performance indicators (KPIs). Mobile health platforms can make ROI tracking easier by combining data from health records, billing and schedules. These platforms offer insights into how users interact with their features, which helps understand their financial impact.

JAMEY SHIELS (*Advocate Health*):

Without a cohesive solution, the ability to track downstream ROI is tricky with all the different data sources I have to aggregate. Financial KPIs don't capture the complete picture. We also consider things like how patient engagement improves efficiency or satisfaction. These factors play a big role in determining our ROI.

AMY STEVENS (*Vice President and CMO, Tidelands Health*):

Patient engagement often used to be something you didn't necessarily have to put numbers to. Everybody felt like it was just important. More and more we're hearing, 'Yes. That's true, but coming out of COVID we really do need to be able to figure out — where are those places, where we can actually track return on investment?'

...And patient engagement.



Improving the patient experience is complex. It requires a balance of data-driven insights, personalized care, leadership involvement and a long-term commitment to change. To this end, leaders are considering the following:

- **Converting clinical data to operational insights:** Making data understandable and relevant can motivate physicians to manage their schedules more efficiently, but this process must be physician-led.
- **Cohesive consumer experience in complex organizations:** In programs with multiple patient-facing components, creating a unified patient experience is challenging. Some leaders have resorted to hiring additional help.
- **Balancing academic and medical goals:** In academic medical centers, the dual roles of clinicians in research, education and other activities can complicate business decisions, affecting the patient experience.
- **Personalization vs. privacy:** New guidelines on data tracking, especially concerning protected health information, pose challenges. Balancing the need for personalization in care with data security and privacy is complicated, possibly requiring systems like opt-in mechanisms for data sharing.
- **Time required for real change:** Significant change, such as patient education efforts, can take a long time, often years, to manifest. Persistence is key, but focusing on long-term goals can be difficult.

GOZIO EXECUTIVE DIALOGUE:

Finding the ROI in Patient Engagement Programs

JAMEY SHIELS (*Advocate Health*):

Our big challenge is converting clinical data into actionable business insights. When we present this data in a way that resonates with physicians, their competitive nature kicks in. If we can show how to efficiently manage their schedules, allowing flexibility like openings at three o'clock on Friday, it helps. However, it must be led by the physicians.

LEA CHATHAM (*Gozio Health*):

In organizations that have multiple components, it can be very hard to create a cohesive consumer experience. We've talked to people who gave up and brought in a third-party consultant to work to get them all on the same page.

DIANE MCGHEE (*UT Southwestern Medical Center*):

As an academic medical center, you also have clinicians doing research, education, or other activities. I think sometimes academic and medical goals can complicate business decisions.

As health care becomes more consumer-centric, leaders must leverage technology and data to enhance the patient experience. Customizable digital platforms, which offer a range of patient-centered features, are catering to the clinical needs of patients and addressing broader aspects of their well-being, boosting loyalty and engagement. However, challenges remain, particularly in tracking the ROI of these initiatives. Leaders are learning how to measure impact, align metrics with operational goals and iterating processes over time, building toward a cohesive consumer journey.

** The affiliations and roles of individuals mentioned may have changed since the event in September 2023.*



SPONSOR



Gozio Health partners with health systems to increase consumer engagement using a proven mobile platform and strategy. The entire healthcare journey – both in-person and digital – is improved by giving systems the flexibility to consolidate all their patient-facing digital solutions into one premium native mobile experience accessible by anyone, anywhere. Combined with Gozio's patented indoor positioning technology, the platform empowers consumers to confidently navigate their healthcare journey and enables health systems to more effectively achieve their business goals. Gozio customers surveyed in a 2021 KLAS Research Emerging Technology Spotlight report found 100% satisfaction.

TO LEARN MORE, VISIT
WWW.GOZIOHEALTH.COM

