Beyond CRM: Lessons on Consumer Driven Healthcare

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The healthcare consumer of today
Meet Rachel.
She makes choices.

She prioritizes relationships.

She relies on word of mouth.

She uses digital tools to research nearly every decision in her life.

In making healthcare decisions, she looks for reputation, access and experience.

Operating in the New Consumerism of Healthcare
Today’s Healthcare Consumer is:

**Informed**

Consumers view up to eight health information sites and rely on them to make care decisions.

Source: STAX web survey and analysis, March 2017

**Choosy**

65% of consumers are frequently shopping for a new physician.

Source: STAX web survey and analysis, March 2017

**Impatient**

80% of consumers will choose a physician that has online self scheduling over an identical one that doesn’t.

Source: STAX online scheduling survey, November 2016

**Fickle**

Only 9% of consumers would definitely follow their PCP to another practice or clinic.

Source: Deloitte 2014 Consumer Health Study
Qualities Consumers Value in Companies

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<thead>
<tr>
<th>Service</th>
<th>Non-healthcare companies</th>
<th>Healthcare companies</th>
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<tbody>
<tr>
<td>Provide great customer service</td>
<td>53</td>
<td>53</td>
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<tr>
<td>Delivering on expectations</td>
<td>42</td>
<td>43</td>
</tr>
<tr>
<td>Making life easier</td>
<td>37</td>
<td>37</td>
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<tr>
<td>Offering great value</td>
<td>39</td>
<td>36</td>
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Source: McKinsey Consumer Health Insights 2015
Healthcare Consumerism is Accelerating

How often are consumers researching physicians?

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<th>Weekly</th>
<th>Monthly</th>
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<tr>
<td></td>
<td>29%</td>
<td>26%</td>
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Source: Stax web survey and analysis, March 2017.
Consumers Want the Ability to Compare Across Hospital Systems

How important is the ability to compare physicians across hospital systems?

- Extremely Important: 28%
- Very Important: 21%

Source: Stax web survey and analysis, March 2017.
Consumers look at an average of 4 physicians during the research process.

Source: Stax web survey and analysis, March 2017.
Consumers Make Decisions with Both the Head & Heart

Objective Data

Subjective content
Connecting with Consumers in a World of Complexity

Consumers are accustomed to frictionless and delightful experiences that empower them to live better lives.
The Three Pillars of Healthcare Consumerism

I. Increased transparency
II. Greater accessibility
III. Personalized engagement
What can we learn and how can we operate in this new world?
Out of Industry Exemplars

Service Excellence
“We are ladies and gentlemen serving ladies and gentlemen.”

Customer First
“We’re not competitor obsessed, we’re customer obsessed. We start with what the customer needs and we work backwards.”

Powering Informed Choices
“TripAdvisor provides travelers with the wisdom of the crowds to help them decide where to stay, how to fly, what to do and where to eat.”
It Could Look Like This…

“I was so scared when I initially got my results. But after some research, I found a specialist in my area and immediately booked a consultation. She’s been my partner in health ever since.”

-- Lisa, Minneapolis, MN

“My dad was aging. I could see the signs. With my mom gone, I knew I had to do the heavy lifting. I was able to review and compare providers to find one I knew he’d be comfortable with.”

-- Chris, New York, NY

“I found the perfect doctor to perform my procedure at the best hospital in my area. With some planned downtime immediately after, I’m now healthier now than I was in my 20s.”

-- Jennifer, Napa Valley, CA
The Consumer Journey

When do consumers make decision around their care and how do we influence those decisions?

“Who can I trust with the care of my child?”

“Where can I get an appointment quickly?”

“What do other people think of this doctor?”

“Where do I go when I arrive?”

“My situation is unique, how well does my provider understand me?”

“Did I get the highest quality care for my child?”

“Search”

“How soon can I see the doctor I just selected?”

“Do I have to call the practice to schedule? They never answer…”

“My schedule is busy; does Thursday at 3:15 work?”

“Schedule”

“Care Episode”

“Return”

“Does this doctor and health system understand my unique needs and situation?”

“When should I return for my check up?”

“What other relevant information do I need?”
Consumers and Marketplaces

Trusted third-party marketplace sites are relied on by consumers to make more informed decisions.

Source: Stax web survey and analysis, March 2017.
Consumers Use More than Hospital Websites when Researching

Which sources have you ever used to research hospitals or physicians?

64%

Physician Rating & Review Websites

49%

Hospital Systems Websites

Source: Stax web survey and analysis, March 2017.
Physician & Hospital Rating Sites are Trusted

How trustworthy do you find 3rd party hospital and physician rating sites?

- Highly Trustworthy: 11%
- Very Trustworthy: 31%
- Trustworthy: 24%

Source: Stax web survey and analysis, March 2017.
Reviews are Trusted

72% of consumers trust online reviews as much as recommendations from friends or family.

Source: Stax web survey and analysis, March 2017.
Consumers are Mobile First

Consumers book appointments with their doctors more frequently on their mobile device and would select a provider that offers online scheduling options over a physician that does not.

Source: Deloitte 2014 Consumer Health Study
Virtual Visits are Increasingly Important

77% of consumers would consider seeing a provider virtually, and 19% already have.

Source: Deloitte 2014 Consumer Health Study
What can you do to meet consumers in the moments that matter most?
Help her **choose** the right provider.

Make it easy for her to **connect** with that provider.

Help her **manage** her care.
**Be Where She is and Make it Easy to Choose You**

Build a digital asset network to engage the consumer where and when they make decisions, in order to optimize potential attraction and conversion.

**Key Goals:**

1. Use a range of digital tactics to be available when and where she is
2. Use differentiated content to create preference for physicians, practices and service lines
3. Use self-scheduling to improve access and reduce friction
Use CRM and Predictive Models to Identify Her

Employ a broad portfolio of marketing tools to drive patient acquisition to your service lines

**Key Goals:**
1. Effectively target patients most in need of care
2. Use lower-cost alternatives with higher return
3. Measure and evaluate campaign results
Keep Her Connected with Digital Health Coaching

Use technology to engage patients between visits with goal of driving improved health and outcomes

Key Goals:
1. Create triage system to ID and categorize patients based on their care needs
2. Use ongoing communication (via email/text) to foster dialogue between patients, physicians
3. Begin dialogue to build greater trust with MDs and drive patients to make better health choices

Text “Try a Chat” to 720-410-6448
Use Marketing Automation to Drive Ongoing Engagement

Leverage data insights and communication tools to develop always-on relationships with healthcare consumers

**Key Goals:**
1. Become a trusted source for healthcare information, services
2. Use communication to develop ongoing relationships
3. Find ways for technology, data insights to augment existing resources
WHO WE ARE AT HEALTHGRADES

WHY WE EXIST

To give people the confidence to make the right healthcare decisions.

HOW WE WORK

By providing trusted information that helps consumers and providers connect.
Want to Learn More?

www.healthgrades.com/hospitals

Healthcare Internet Conference
October 23 – 27, Orlando

www.Healthgrades.com/hospitals/contact-us
Thank you.