LEVERAGE MARKET ANALYTICS TO GAIN LOYALTY AND ENGAGE PATIENTS

marketware™
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• Attendees can ask questions by typing it into the question box on the control panel. Questions will be addressed at the conclusion of the webinar.
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• Presentation is being recorded & the link along with the Power Point Presentation will be sent to you next week.
S P E A K E R S

Carrie Bennett, FACHE
VP of Client Strategy, Marketware

Katie Alexander
Director of Physician Relations & Business Development, Tampa General Hospital

Josh Cameron
Marketing Manager, Oncology Consultants
Grow Referrals
Physician Relationship Management: Optimize & streamline your physician outreach initiatives

Retain Volume
Patient & Consumer Marketing: Engage patients to increase acquisition & manage population health

Discover Marketshare
Business Intelligence: See the full picture with 360° market insight that empowers growth
Upcoming Events

SHSMD Connections 2017

Orlando, Florida
September 24-27, 2017
Carrie Bennett
VP of Client Strategy

• Background includes 15 years in healthcare management in a variety of healthcare settings

• Former roles within business development realm include marketing, physician recruitment/onboarding, consumer engagement and service line planning

• Carrie is a graduate of the College of William and Mary; she also has an MBA with emphasis in healthcare management

• Board certified in healthcare management (ACHE), Carrie actively volunteers within the Georgia Association of Healthcare Executives, AAPL and other organizations.
Yesterday’s Approaches = Smaller Returns

- Shifts in Case Mix
- Shifts in Payer Mix
- Rising Costs
- Shrinking Reimbursements
Value = Quality + Cost = Outcomes + Patient Experience + Direct Costs + Indirect Costs
New Strategies
Leading the Way

• Acquisition of healthcare assets that are not fully aligned with the system today.

• Expansion of services by adding procedures, tests, emerging clinical technologies, or subspecialists.

• Market expansion through enlargement of primary care network & ancillary services in targeted markets.

• Establishing preferred arrangements with targeted health plans.

• Aggressive recruitment of providers into alignment structures (i.e. employment, PSAs, co-management, clinical integration) that ease the way for hospitals & physicians to take advantage of reimbursement strategies.
Acute Care- Focused

Defined Role with Accountability

Prioritization by Market/Service

Relationships with Intent

System-Focused

Measuring ROI

Strategic Priorities

Barrier Identifications

Defined Role with Accountability

Vague Role Definitions

All Volume Equal

Issue Resolution

Measuring Activity

Acute Care-Focused

Customer Service

Generalists

Physician Relations

Programs Are Evolving
Why Data-Driven Approach?

• Supports the development of stronger strategic priorities.

• Focuses outreach resources where they add the most value.

• Provides foundational support needed to build & redirect a facility's referral base.

• Increases ability to measure ROI of outreach activities.
Overcoming Data Challenges

YOU WANT THE DATA? YOU CAN'T HANDLE THE DATA

SHOW ME THE DATA!!!

NO MORE DATA FOR YOU COME BACK IN ONE MONTH
The 8 P’s Of Data-Driven Development

1. **Products That Perform**
   Services that define your organization

2. **Position In The Market**
   Where you stand in market as compared to peers

3. **Profitable Volumes**
   Identifying “good” volumes

4. **Patient Pipelines**
   How patients get to your organization

5. **Physician Alignment**
   Understanding impact of formal & informal connections

6. **Prioritization**
   Quantifying and ranking growth opportunities

7. **Planning For Progression**
   Actions taken to advance network relationships

8. **Proving Returns**
   Impact of new reimbursement models and plans
What are my organization’s strategic priorities & opportunities for growth?

What are the strongest areas within this service line and why?

What new physicians, services or equipment are being added to these areas in the near future?

How much growth can our operational leaders accommodate without compromising service?

Is our patient experience a growth accelerator or barrier?

Is our quality performance a growth accelerator or barrier?
**Data Helps Liaisons Discover Profitable Volumes**

**Question(s) I Want to Answer**

What data do I have regarding the profitability of the services I am marketing?

Do I know how the contribution margin tied to admissions/procedures/tests tied to this service line?

Are there specific volumes (procedures, payors, etc.) we should be going after to maximize service line performance?

How will growth in this area strengthen our financial performance?
What Is “Good Volume”? 

Volume that positively impacts an organization’s contribution margin
Data Helps Liaisons Discover

Market Position

QUESTION(S) I WANT TO ANSWER

What has been our historical growth performance? (by service line, key markets, procedures, etc.)

What is our current market position?

Are we in a position to gain or lose market share?
QUESTION(S) I WANT TO ANSWER

How are new patients finding us today (i.e. self-referral, PCP, specialists, ED/EMS, social workers, payers)?

What data (i.e. internal encounters, practice referral logs, claims data) & field intelligence can you review to better understand existing referral patterns?

Where patients are being directed today & why?
Referral Mapping

**Common Sources of Referrals**

**Typical Referral Pathway**

**Access Constraints**

**Top Referral Partners**

**Top Targeted Partners**

**Example 1:** Neurology (EMGs)
- Spine Surgeons
- Neurologists
- Podiatrists
- Rheumatologists

**Example 2:** Cardiology Referrals
- Primary Care
- Surgical Specialists
- Neurology
Reverse Targeting Analysis

Practitioners (Last Refresh 2016 Q1)

<table>
<thead>
<tr>
<th>Name</th>
<th>Specialty</th>
<th>Patients</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Urology</td>
<td>(Generalist)</td>
</tr>
<tr>
<td></td>
<td>Urology</td>
<td>(Generalist)</td>
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<td>Urology</td>
<td>(Generalist)</td>
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</table>
Uncovering Competing Ties

Network Connections

<table>
<thead>
<tr>
<th>Networked Name</th>
<th>Networked Specialty</th>
<th>Market Overview</th>
</tr>
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<tbody>
<tr>
<td>Michael Eugene Libowtz</td>
<td>Internal Medicine</td>
<td>9 0.6%</td>
</tr>
<tr>
<td>Neeraj Chopra</td>
<td>Internal Medicine</td>
<td>8 0.6%</td>
</tr>
<tr>
<td>Alpha Ezgu</td>
<td>Internal Medicine</td>
<td>7 0.5%</td>
</tr>
<tr>
<td>William Addison Warren</td>
<td>Internal Medicine</td>
<td>6 0.4%</td>
</tr>
<tr>
<td>Robin Shannon Dick</td>
<td>Internal Medicine</td>
<td>5 0.4%</td>
</tr>
<tr>
<td>Eugene Sergio Machado</td>
<td>Internal Medicine</td>
<td>5 0.4%</td>
</tr>
<tr>
<td>Mahmoud Haj Doski</td>
<td>Internal Medicine</td>
<td>4 0.3%</td>
</tr>
<tr>
<td>Penny Lynn Bisk</td>
<td>Internal Medicine</td>
<td>4 0.3%</td>
</tr>
<tr>
<td>Sophie Tao</td>
<td>Internal Medicine</td>
<td>4 0.3%</td>
</tr>
<tr>
<td>Mark Allan Park</td>
<td>Internal Medicine</td>
<td>4 0.3%</td>
</tr>
<tr>
<td>None</td>
<td>Stared Volume</td>
<td>% Provider to Networked</td>
</tr>
</tbody>
</table>

Demographics

Metrics

Dashboards
Creating New Ties

UROLOGY REFERRALS

BEFORE INTRO

FOLLOWING INTRO
Data Helps Liaisons Determine

**Physician Alignment**

**QUESTION(S) I WANT TO ANSWER**

- What field intelligence can we access to better understand where physician relationships stand today?
- What data do we have to better understand network connections within our market?
- Are there specific relationships that exist that would be difficult to navigate or change?
- What data do we have to understand which providers would enhance our value equation?
Data Helps Liaisons Discover

Prioritize Outreach Efforts

Question(s) I Want to Answer

What business can you not afford to lose?

Are you missing referral opportunities from your existing medical staff?

Are specific physicians are splitting their business?
What education could you offer to move the needle in your direction?
Identifying ‘Keepage’

<table>
<thead>
<tr>
<th>Cardiologist</th>
<th>Splitter</th>
<th>Loyal</th>
<th>% of Employed PCP Referrals FY15</th>
<th>% of Employed PCP Referrals FY16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardiologist A</td>
<td>13.6%</td>
<td>9.2%</td>
<td>4.4%</td>
<td></td>
</tr>
<tr>
<td>Cardiologist B</td>
<td>New</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cardiologist C</td>
<td>7.4%</td>
<td>4.1%</td>
<td>3.3%</td>
<td></td>
</tr>
<tr>
<td>Cardiologist D</td>
<td>Loyal</td>
<td>12.9%</td>
<td>20.8%</td>
<td></td>
</tr>
<tr>
<td>Cardiologist E</td>
<td>Loyal</td>
<td>11.4%</td>
<td>13.3%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Cardiologist F</td>
<td>Splitter</td>
<td>3.7%</td>
<td>2.5%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Cardiologist G</td>
<td>Splitter</td>
<td>1.3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cardiologist H</td>
<td>Loyal</td>
<td>11.7%</td>
<td>17.0%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

% Referrals to Loyal:
- 36.0%
- 58.0%
- 22.0%
Data Helps Liaisons Track Progression Towards Goals

**Question(s) I Want to Answer**

- What results do we expect if this strategy is successfully implemented?
- What series of actions can we put into place to support this strategy?
- How many of these actions take place?
- What percentage of targeted physicians were reached as a result of this initiative?
- Has our team followed up on all outstanding issues and requests for follow up?
Measuring Visits Against Referrals

Volume Trends are compared to visit activity occurring 6-8 weeks prior given avg. timeframe to gain traction.

Source: Client’s internal data pulled from Ascend and Scout
What data can I use to demonstrate the role my team & I have played in the success of my organization/service line?

What volume, financial, quality and alignment measures are impacted as a result?
**Strategic Priorities**
Service line or engagement initiatives that strategically support the organization’s overall mission, vision & values.

**Success**
Outlining the result(s) you expect to achieve within the next 12 to 18 months.

**Strategies**
Translate market insights into one or more approaches for allocating resources to reach expected results.

**Tactics**
Set of actions used to reinforce a chosen strategy.
MEASURING VISITS AGAINST REFERRALS

Source: Client’s internal data pulled from Ascend & Scout
### ROI Analysis

**Initiative:** Grow Structural Heart Cases

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Incremental Volume</th>
<th>Profitability Per Case</th>
<th>Bottom Line Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift of employed PCPs referrals to loyal cardiology practice</td>
<td>25</td>
<td>$2,500</td>
<td>$62,500</td>
</tr>
<tr>
<td>Recruit/onboard new CT surgeon</td>
<td>50</td>
<td>$6,000</td>
<td>$300,000</td>
</tr>
<tr>
<td>Targeted promotion of valve clinic/TAVR</td>
<td>50</td>
<td>$1,000</td>
<td>$50,000</td>
</tr>
<tr>
<td>Targeted promotion of arrhythmia center/watchman program</td>
<td>48</td>
<td>$4,500</td>
<td>$216,000</td>
</tr>
</tbody>
</table>

**Net Gain in CM** $468,500

**Est. Referral Development Program Costs** $(160,000)

Source: Internal Financial and Volume Data Provided by Client
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Orthopedics</td>
<td>4 days</td>
<td>4</td>
<td>$4,000</td>
<td>$2,256,000</td>
</tr>
<tr>
<td>OBGYN</td>
<td>1 day</td>
<td>8</td>
<td>$1,000</td>
<td>$320,000</td>
</tr>
<tr>
<td>Podiatry</td>
<td>1 day</td>
<td>10</td>
<td>$500</td>
<td>$200,000</td>
</tr>
<tr>
<td>ENT</td>
<td>2 days</td>
<td>15</td>
<td>$2,000</td>
<td>$2,400,000</td>
</tr>
<tr>
<td>Other</td>
<td>0.5 day</td>
<td>3</td>
<td>$1,000</td>
<td>$60,000</td>
</tr>
</tbody>
</table>

Source: Internal Financial and Volume Data Provided by Client
Direct Cost

 Contribution Margin

Volume
Quarter Prior

13% Decline
During Negotiations

Rebound
Quarter Following

Minimal CM impact despite 13% volume decline due to implant pricing initiative.
I LOVE DATA ANALYSIS

IT MAKES PEOPLE CRY
Katie Alexander
Director of Physician Relations & Business Development

- Background includes 12 years in physician relations.
- TGH’s physician relations program initially included two liaisons including Katie.
- Today, Katie is responsible for providing directing 5 physician liaisons and 2 CME coordinators.
- Her department also supports hospital strategy, business development and marketing – including strategies designed to promote targeted service lines.
CASE STUDY:
Vascular Surgery department approaches physician relations with task of promoting their newly accredited Aorta Program. Vascular surgeons had historically been treating aortic aneurysms but wanted to capitalize on state accreditation and increase market share.

DATA SET:
Began with looking at our existing vascular surgery market share and identifying the top 4 zip codes. TGH identifies our market as 12 Counties.
• TGH considers referrals between 20%-80% to be our top tier focus. For this campaign we wanted to widen our reach so we focused on greater than 12%.

• Once the zip codes are benchmarked we create an outreach campaign that targets the tier 1 areas.

• Using Marketware we pull the list of providers driving referrals in those zip codes.
  o Look out our vascular surgeons networked connections
  o Look at network connections for other vascular surgeons in those zip codes.
  o Target primary care providers, cardiologists and emergency rooms with marketing materials.

• Work with marketing team to develop print materials to drive to that campaign.
  o Standard physician campaign materials include a program brochure and a pocket card for referring providers with referral criteria and phone number.
TGH Market Share for 12 Counties Vascular Surgery Referrals Benchmark

JULY - AUGUST 2015

Zip codes where TGH holds greater than 2% of the referral market from PCPs for Vascular Surgery & Aorta Inpatient Procedures.

Source: The Advisory Board, Crimson Market Advantage.
TGH Vascular Market Share Trend 2015

OUTREACH SUMMARY:
• 140 Office Visits
• 2 CME Dinners (43 Attendees)

FINDINGS:
By using targeted outreach, the physician relations team was able to efficiently narrow down 1,600 potential referring offices to 140 to target with outreach visits and two CME events.

CAMPAIGN RESULTS:
After 3 months of outreach, the vascular surgery market share saw a 7% increase from 4 targeted zip codes.
Vascular Surgery Market Analysis

Physician Targeted Outreach Campaign

**JUNE 2015 - NOVEMBER 2015**

- Primary focus on Aorta Program with cross selling for all Vascular services
- Focused on top 4 zip codes where TGH held highest market share
- Targeted PCPs with greater than 12% of referrals coming to TGH.
- Targeted Cardiologists and Vascular Surgeons with strong connection to those PCPs.

<table>
<thead>
<tr>
<th>CITY</th>
<th>JUNE – AUGUST</th>
<th>SEPTEMBER - NOVEMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tampa 33612</td>
<td>48%</td>
<td>51%</td>
</tr>
<tr>
<td>Brandon 33511</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Tampa 33607</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Tampa 33613</td>
<td>12%</td>
<td>13%</td>
</tr>
</tbody>
</table>
Case Study:

- GYN Oncologist left & went to the competitor.
- New GYN Oncologist came on board & wanted an outreach plan.
- All new campaigns begin with a market overview & dive into the providers driving referrals in that market.
- Facility market share used to research former GYN Oncologist.
- Team searched for MD’s strongest relevant network connections and prioritized outreach accordingly.
Josh Cameron
Marketing Manager

Oncology Consultants

- Oncology Consultants is multidisciplinary oncology practice with over 10 sites across the state of Texas.
- Their team of board certified physicians, nurses, researchers and other specialized providers offer a variety of oncology services including diagnostic imaging, radiation therapy and pharmacy services.
- Over the last two years, Josh has been responsible for all projects related to marketing and business development, including the management of OC’s two physician liaisons.
Using Data to Drive Referrals: Three Marketware Dashboards for Growth

**First Referrals:**
This report in scout allows our team to see what physicians are referring to our organization for the first time each month.

**Variance Report:**
This is a report tracking the # of new patients each of our referring physicians is sending us monthly.

**Claims Data:**
In scout, we have access to claims data showing us the referral mixes for our referring physicians.
# Using Data to Drive Referrals:
First Referrals Report

<table>
<thead>
<tr>
<th>REFERRAL DATE</th>
<th>REFERRING MD</th>
<th>ATTENDING MD</th>
<th>ATTENDING OFFICE</th>
<th>LIAISON ACTIVITY</th>
<th>LIAISON</th>
<th>FIRST VISIT</th>
<th>ACTIVITY TYPE</th>
<th>REFERRAL VOLUME</th>
<th>TOTAL CHARGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/12/16</td>
<td>J Alford</td>
<td>Pandya</td>
<td>Sugar Land</td>
<td>YES</td>
<td>Shanna</td>
<td>11/20/15</td>
<td>Visit Prior</td>
<td>19</td>
<td>$57,000</td>
</tr>
<tr>
<td>4/9/16</td>
<td>S Patel</td>
<td>Raizen</td>
<td>Texas Med</td>
<td>YES</td>
<td>Allison</td>
<td>5/2/16</td>
<td>Follow-Up</td>
<td>12</td>
<td>$36,000</td>
</tr>
<tr>
<td>3/22/16</td>
<td>G Ramos</td>
<td>Velasquez</td>
<td>Southwest</td>
<td>NO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Track liaison return on visits (ROV)
- Strategically target new referral relationships opportunities with external claims data
- Other data points in this report: insurance, referring location, # of activity, attending MD visit
Using Data to Drive Referrals: Liaison ROV First Referrals Report

Liaison ROV Types

<table>
<thead>
<tr>
<th>LIAISON</th>
<th>VISIT PRIOR</th>
<th>FOLLOW-UP</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALLISON</td>
<td>72</td>
<td>109</td>
</tr>
<tr>
<td>SHANNA</td>
<td>54</td>
<td>96</td>
</tr>
<tr>
<td>MIGUEL</td>
<td>43</td>
<td>137</td>
</tr>
</tbody>
</table>

Percentage of Visits Prior to Referral

- 33%
- 67%

Revenue from Prior Visits

<table>
<thead>
<tr>
<th>LIAISON</th>
<th>REVENUE</th>
</tr>
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<tbody>
<tr>
<td>ALLISON</td>
<td>$216,000</td>
</tr>
<tr>
<td>SHANNA</td>
<td>$162,000</td>
</tr>
<tr>
<td>MIGUEL</td>
<td>$129,000</td>
</tr>
</tbody>
</table>
Using Data to Drive Referrals: Monthly Variance Analysis

Know Your Key Players
Who are your top referring physicians per service line? Who can you not afford (literally) to lose?

Find Leakage Faster
Before utilizing Marketware, Dr. Fox went 5 months without referring due to an issue. An estimated 20 referrals were lost allowing us to lose as much as $60,000 in revenue.

How Are Targets Improving
Monitor first time referring physicians over time to see how their referral volume grows as well as insurance mix overtime.
Using Data to Drive Referrals: Claims Data

### Networked Providers (CMS)

<table>
<thead>
<tr>
<th>Networked Name</th>
<th>Specialty</th>
<th>30</th>
<th>60</th>
<th>90</th>
<th>180</th>
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</thead>
<tbody>
<tr>
<td>Konay Navarch</td>
<td>Hematology &amp; Oncology</td>
<td>24</td>
<td>27</td>
<td>27</td>
<td>34</td>
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<tr>
<td>Frankie Ann Holmes</td>
<td>Hematology &amp; Oncology</td>
<td>18</td>
<td>20</td>
<td>21</td>
<td>25</td>
</tr>
<tr>
<td>Vivek Kavadi</td>
<td>Hematology &amp; Oncology</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Kathleen Shadie</td>
<td>Hematology &amp; Oncology</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Networked Interval (Days)
Using Data to Drive Referrals: Claims Data

**Strategically Plan**
When evaluating opening a new office, we can utilize claims data to see what the current competition is in the area and what type of patient mix (insurance, service line, etc.) is currently in the area.

**Know Your Market Share**
Identify what your top referring physicians are sending you on a regular basis. But, also evaluate what % of their referrals are they sending to you. What is the insurance mix of what they send you?

**Know Your Competition**
When a liaison goes into a first time referring office, we can know in advance who he/she is currently referring to evaluate the potential opportunity.

**Where Is Your Leakage Going**
Example – Dr. Ahmed referral volume began to drop off in monthly variance analysis. A competitor opened an office closer to his office. Now, we are strategically planning to open office in his area.
QUESTIONS?
THANKS FOR ATTENDING

VISIT MARKETWARE.COM TO LEARN MORE OR REQUEST A DEMO

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