

•• The future of CRM

Perspectives on where healthcare CRM is headed

Healthgrades interviewed its own experts and pioneers in CRM to gather their views on how CRM systems are benefiting health systems today and what the future of CRM, predictive modeling and marketing automation holds for our industry.

The future of CRM

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Health systems will expect CRM platforms to provide more information and insights to departments throughout the organization. Rich data and predictive analytics will inform programs that keep patients engaged in their own care.

A successful customer relationship management strategy uses all available data to identify, reach, motivate, and influence consumer behavior; the goals are to drive engagement, manage a population's health, and produce optimal ROI. A CRM solution should enable this strategy. CRM tools are used effectively in various industries today and are also transforming healthcare.

Key features of a data-based CRM strategy for healthcare organizations include:

- Tracking points along the patient journey to reach each individual, and then anticipate and suggest next steps
- Customizing targeted, personalized communications to encourage better decision-making among patients
- Measuring a campaign's impact on new patients and new encounters

To achieve its maximum potential, healthcare CRM will need to interoperate with a broad set of health system functions and IT assets. Such integration will provide insights that drive a more personalized customer experience across the enterprise.

In this guide, experts from Healthgrades will discuss how CRM systems are benefiting health systems today and what the future of predictive modeling and marketing automation holds.

01

How are hospital marketers using CRM systems today?

By using healthcare CRM systems, hospital marketers can analyze data to effectively drive engagement between patients and physicians as the healthcare industry changes. Jay Wilson, senior vice president of marketing platforms and services at Healthgrades, described the role of CRM systems in the industry today — and where they are flourishing and failing.

“Fundamentally, CRMs are succeeding in providing hospitals the opportunity to market to people in a contextually relevant way,” Wilson said. “Where it really tends to be less successful is the conversion experience that customers are used to having. Currently, most CRM systems are focused on visual channel engagement. Very few focus on taking the full conversion from initial inquiry to appointment to encounter, until that consumer is a new patient and then a loyal patient.”

Wilson believes CRM systems are enabling organizations to use marketing strategies as entryways to learn more about their customers, but noted that there are many other ways to assess and use CRM data that hospitals are not taking advantage of. Organizations that make fuller use of their data will find new ways to benefit hospital marketers, clinicians, and patients.

02

How will hospital marketers, strategists, and clinicians use CRM systems in the future?

Today’s CRM systems may be producing successful outcomes for hospital marketers, strategists, and clinicians, but that doesn’t mean there isn’t room for growth. More and more organizations are starting to use CRM systems, which means competition will intensify. Dave Griffith, vice president of analytics and insights at Healthgrades, believes competition will have a huge impact on the future of CRM.

“As competition heats up and consumers have more choices, technology will have to change,” he observed. “The big shift is going to be assessing and resolving questions like: How can you take early advantage of marketing opportunities? How do you optimize your media mix? And how can you more accurately understand ROI and other performance metrics?”

Consumer choice is another substantial factor that will affect how CRM is used, in Griffith’s opinion.

“Consumers are becoming more informed and savvy. They’re more comfortable doing their own research. Marketers and hospitals are going to have to work hard to reach the right users. They’ll have to take advantage of insights about users and how to properly distribute media to grab those consumers’ attention.”

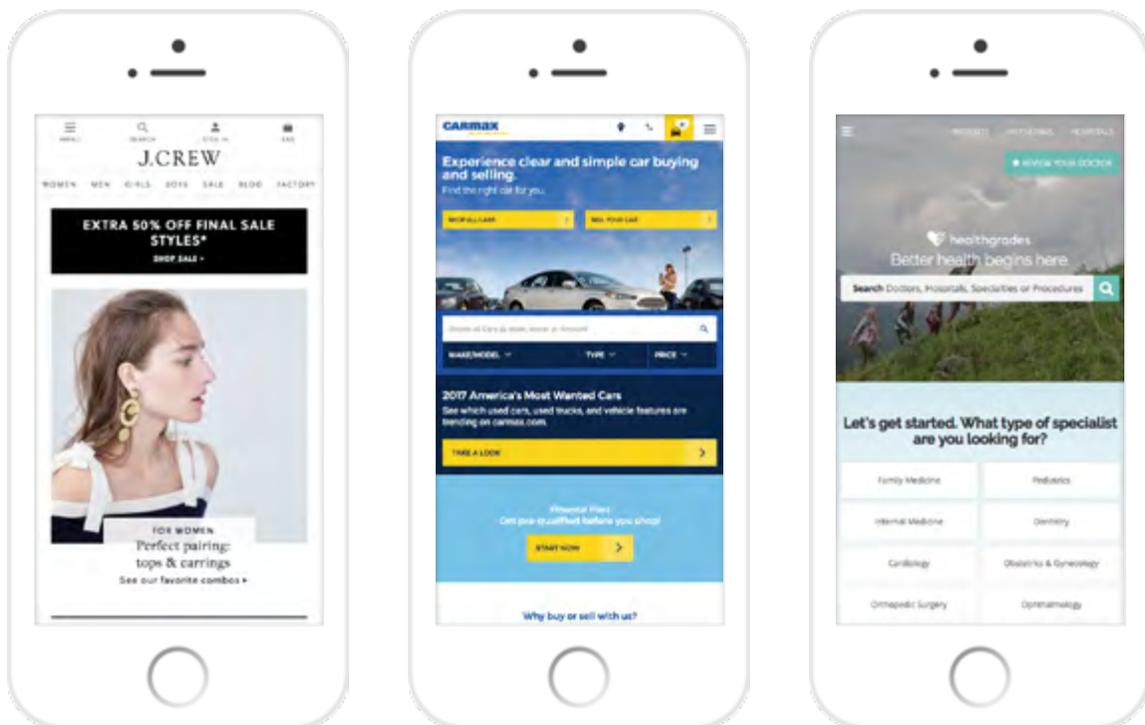
For these reasons, Griffith noted, CRM platforms will be expected to provide more information and insights to other parts of the health system. The rich data and predictive analytics these platforms provide will inform population health efforts, new forms of digital care management (including bidirectional “chatbots”), and other programs that keep patients engaged in their own care.



“AS COMPETITION HEATS UP AND CONSUMERS HAVE MORE CHOICES, TECHNOLOGY WILL HAVE TO CHANGE”

DAVE GRIFFITH
Vice President of Analytics and Insights,
Healthgrades

CONSUMERS EXPECT A CONVENIENT EXPERIENCE ACROSS ALL INDUSTRIES



03

How is consumerism impacting the way CRM is used in healthcare?

Consumerism has been a dominant force in various industries over the years, but now it's taking center stage in healthcare. "Healthcare has been slow to adapt to consumerism because it is so complex," said Jon Barlow, vice president of integrated marketing strategy at Healthgrades. "What we expect when we're buying clothes or a car — that amount of control — hasn't really transitioned over into the healthcare space until recently."

Patients treat healthcare much like any other commodity, attempting to make the best decisions based on the quality of care they'll receive for the right cost. The difference is, now consumers have access to more resources and data to inform their decisions, and they are seeking information not just when an acute need arises. Hospitals and health systems that understand and reorient around this expanded, "always-on" consumer ecosystem will be the most successful.

As healthcare continues to transform, the rise in consumerism will affect how marketers use CRM, Barlow predicts. Because patients are already looking for greater personalization, marketers need to segment people out of larger groups. Targeting a zip code or even a household is now less vital than using data to pinpoint individual consumers, such as people who have a specific health condition or special interest in a type of care.

04

How can hospital marketers transform their strategies?

Because marketers are moving to more personalized, contextual, always-on communication strategies across a host of channels, they're transforming the way they receive, analyze, and assess the kind of data that drives conversion. In the future, hospital marketers can meet patient expectations by evolving their current strategy into a customer-driven plan that meets the needs of every individual. Current strategies are already enabling hospital marketers to:

- Shift to a more customer-centric model of communication
- Use predictive modeling and artificial intelligence to drive greater levels of personalization
- Use marketing automation as a bidirectional conversation tool



IF YOU'RE CREATING A BIDIRECTIONAL CONVERSATION, YOU HAVE TO MAKE SURE YOU HAVE THE APPROPRIATE CONTENT TO PROVIDE TO AN INDIVIDUAL THAT WILL KEEP THEM INTERESTED AND ENGAGED.

HEIDI SCHULTE

Vice President of Solution Consulting, Healthgrades

Hospital marketers need to change their mindset to meet patient-driven goals, according to Heidi Schulte, vice president of solution consulting at Healthgrades.

“It’s an evolution from thinking about a service line to more of a consumer-centric approach,” she said. “Consider how connecting with consumers along their journey in meaningful ways can help hospital marketers reach the goals they’ve set out to achieve. Put the consumer at the center of everything, rather than starting with an internal focus.”

Predictive modeling and marketing automation are two key features that can help increase customer focus and improve communications as consumers come to expect greater personalization, Schulte contends.

“Predictive modeling helps identify a population based on clinical need, as well as giving the marketer information about how to connect with each individual consumer. Based on your objectives, who are the consumers you should focus on, where are they looking for information, and when are they searching? What content do you have available to engage with them all along their journey, from initial search to scheduling an appointment?”

Schulte also stressed the importance of understanding the ways organizations can use marketing automation — because it’s about more than sending out email blasts.

“Marketing automation is often used as an email blast tool when it should be used to create bidirectional communications to nurture the consumer through their journey and guide them to the next step,” she said. “You need to understand when a consumer needs more information and is trying to connect with you, and when you should be reaching back out to them. This is where content really comes into play, as well: If you’re creating a bidirectional conversation, you have to make sure you have the appropriate content to keep a consumer interested and engaged.”

05

How can hospitals better use data to inform their strategies?

We asked all four of our experts how hospitals can better use data to inform their strategies. Here's what they had to say:

IMPROVE COMMUNICATION WITH PATIENTS

JAY WILSON / Senior Vice President, Marketing Platforms & Services

“Assessing your data shouldn't only be about driving revenue — hospitals need to take advantage of having richer data to better understand behaviors, patterns, and trends to help drive experience. If you focus on using data to create a great experience, you'll succeed. Use the data to inform these experiences, because it's not always about conversations and making money. It's about the patient-physician relationship, too.”

INCREASE LONG-TERM LOYALTY AND RETENTION

DAVE GRIFFITH / Vice President, Analytics and Insights

“Look at the big picture and ask questions like: What factors are driving retention? How can we use that to determine what indicates when someone may not come back? Should we invest in that consumer more? Should we try to entice that consumer to come back? CRM is a great way to answer all of those questions.”

DRIVE PHYSICIAN ALIGNMENT

JON BARLOW / Vice President, Integrated Marketing Strategy

“Through CRM, health systems are already collecting a plethora of data on the activities and decisions that patients are making throughout their own individual journeys. By connecting and providing their physicians and liaisons with the ability to react and respond to that information in near real time, the health system is able to be more authentic. Patient and physician communication and interactions are more personalized, and the overall experience improves.”

LEVERAGE LOOK-ALIKE PATIENTS

HEIDI SCHULTE / Vice President, Solution Consulting

“Modeling — including techniques to identify look-alike patients — can help provide you with the most accurate view of consumers in your market. Leverage predictive modeling and other behavioral and relationship-based models to better understand your market's needs and how to engage individual consumers where and when they are searching for information. The more data you have access to, the more powerful the models and other analytics that can be employed.”

06

Predicting the future of CRM

Healthcare organizations must consider ways to enhance the patient experience, drive patient-physician alignment, and leverage predictive modeling to position themselves ahead of the competition as CRM strategies become more popular. This will not only enhance current patient-physician relationships, but also attract new consumers, maximize ROI, and more.

07

Let us help

It's important for businesses today to stay ahead of customer needs and preferences. But in an increasingly digital world—where customer data is highly fragmented, low-quality or incomplete—it's challenging to get a step ahead of consumer preferred choices and behaviors.

We arm clients to master their data with the right tools to deeply understand and anticipate health needs, uncover new relationships, and drive effective customer engagement across a multi-channel ecosystem. Our CRM platform helps businesses manage customer information and turn it into data driven insights that enable them to:

- Drive growth-oriented marketing
- Prove the ROI and effectiveness of marketing efforts
- Lead the shift to a consumer-centric engagement model
- Execute insights across channels and touch points
- Leverage best practices to take CRM to the next level
- Make the most of resources, staffing and talent

For more information, **contact us** today to request a demonstration from one of our consultants.

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