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What are consumer expectations for coming back and how can we meet them?

Deval Daily, System Chief Administrative Officer, Neuro and Heart Service Lines, Rush University System for Health
Dr. Dalal Haldeman, Haldeman Marketing, LLC
Rob Klein, Founder & CEO, Klein & Partners
Our Presenters

**Deval Daily MS,**
System Chief Administrative Officer,
Neuro and Heart Service Lines
Rush University System for Health

**Dr. Dalal Haldeman**
Haldeman Marketing, LLC

**Rob Klein**
Founder & CEO
Klein & Partners
Agenda for Today

1) Results from the latest national research on consumer concerns and expectations about coming back in for care

2) How to adjust and implement new operational processes to re-open services during and after COVID

3) Models of communication that generate trust to support patients and providers
National Omnibus Study Results

Online survey among a national sample of 502 consumers fielded May 1-4, 2020
### Things That Would Make Patients Switch Providers

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Another provider can get me in faster than my current provider</td>
<td>30%</td>
</tr>
<tr>
<td>My current provider has been difficult to work with in getting me re-scheduled</td>
<td>29%</td>
</tr>
<tr>
<td>My current provider lacks empathy for my situation (e.g., had a negative attitude towards me; seemed rushed)</td>
<td>21%</td>
</tr>
<tr>
<td>Another provider is willing to work with me on any out-of-pockets I may face to help me afford the care</td>
<td>20%</td>
</tr>
<tr>
<td>Another provider has demonstrated better safety and cleaning procedures to protect me from the Coronavirus</td>
<td>19%</td>
</tr>
<tr>
<td>My current provider treated many Coronavirus patients and that makes me nervous to go there</td>
<td>17%</td>
</tr>
<tr>
<td>Another provider offered me a virtual visit that was immediate (i.e., I didn’t have to wait to be seen virtually)</td>
<td>13%</td>
</tr>
<tr>
<td>Another provider is at the forefront of coming up with a vaccine and treatment for the Coronavirus</td>
<td>12%</td>
</tr>
<tr>
<td>Another provider has really stepped up and done a great job fighting the Coronavirus in my community</td>
<td>11%</td>
</tr>
<tr>
<td>Nothing would cause me to switch</td>
<td>41%</td>
</tr>
<tr>
<td>Not sure</td>
<td>9%</td>
</tr>
</tbody>
</table>

1. **Attitude**
2. **Access**
3. **Safety**
4. **Cost**

**Not a switching influencer**
# Things You Need to Do to Ease Safety Concerns

<table>
<thead>
<tr>
<th>Action</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social distancing in the waiting room</td>
<td>44%</td>
</tr>
<tr>
<td>Seeing providers wearing masks and gloves</td>
<td>38%</td>
</tr>
<tr>
<td>Keeping Coronavirus patients in a completely separate area</td>
<td>33%</td>
</tr>
<tr>
<td>Being given a face mask and gloves to wear when you arrive</td>
<td>28%</td>
</tr>
<tr>
<td>Waiting in your car until time for your appointment</td>
<td>25%</td>
</tr>
<tr>
<td>Seeing providers wash their hands</td>
<td>23%</td>
</tr>
<tr>
<td>Seeing everyone’s temperature before they enter the building</td>
<td>22%</td>
</tr>
<tr>
<td>All providers and staff are continually tested for the Coronavirus</td>
<td>22%</td>
</tr>
<tr>
<td>All patients are tested for the Coronavirus prior to their app’t</td>
<td>21%</td>
</tr>
<tr>
<td>Ability to see a provider that does not see any Coronavirus patients</td>
<td>17%</td>
</tr>
<tr>
<td>Seeing the room cleaned before you enter</td>
<td>16%</td>
</tr>
<tr>
<td>Completing any paperwork at home online before you come in</td>
<td>16%</td>
</tr>
<tr>
<td>Seeing the physician or assistants sterilize the equipment</td>
<td>13%</td>
</tr>
<tr>
<td>Having contactless payments</td>
<td>8%</td>
</tr>
<tr>
<td>Ensuring me you have enough supplies to conduct my procedure</td>
<td>8%</td>
</tr>
<tr>
<td>Adv what they are doing to make it safe to come back for care</td>
<td>8%</td>
</tr>
</tbody>
</table>

Separation and protection just like we have been taught
# Things You Need to Do to Ease Cost Concerns

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lowering or eliminating your co-pay</td>
<td>29%</td>
</tr>
<tr>
<td>Waiving your deductible</td>
<td>27%</td>
</tr>
<tr>
<td>Working with your health insurance company on your behalf to lower your out-of-pocket costs</td>
<td>21%</td>
</tr>
<tr>
<td>Offering free virtual visits in place of an in-person appointment if it is medically appropriate</td>
<td>21%</td>
</tr>
<tr>
<td>Establishing a payment plan (e.g., pay over time with no interest)</td>
<td>17%</td>
</tr>
<tr>
<td>Lowering your direct out-of-pocket costs if you don’t have insurance</td>
<td>15%</td>
</tr>
<tr>
<td>Extending payment dates (e.g., no payment due for 90 days or longer)</td>
<td>14%</td>
</tr>
<tr>
<td>Working with your employer on getting the insurer to lower your out-of-pocket costs</td>
<td>9%</td>
</tr>
<tr>
<td>None of these</td>
<td>16%</td>
</tr>
</tbody>
</table>
Things You Need to Do to Ease Access Concerns

- Offering virtual visits in place of an in-person appointment if it is medically appropriate: 39% → Especially women and those working at home
- Extended hours during the week (e.g., early morning and evenings): 36%
- Seeing patients on the weekends (i.e., both Saturdays and Sundays): 23%
- Call you personally to help you book an appointment: 23%
- Guaranteed same-day appointments within their system: 22%
- Home health visits (i.e., house calls): 17%
- None of these: 10%
Preferred Methods of Communication with Patients
(regarding what you are doing to make it safe for them)

- Phone call directly to you: 57% ( Goes up with age)
- Email: 51% ( Goes up with age)
- Text: 32%
- On the healthcare provider’s website: 23%
- Direct mail: 15% ( Higher for men)
- Online messages: 14%
- Live online interactive Q&A sessions with doctors: 10% ( Mostly younger)
- Hotline to call: 8%
- On the healthcare provider’s social media page (e.g., Facebook, Twitter, etc.): 7% ( Mostly younger)
- On TV: 6%
- On the radio: 4% ( Mostly younger)
- None of these: 5%

Communication Format Preferred

- Written format: 43%
- Video format: 13%
- Either: 24%
- Not sure: 4%
- Both ways: 16%
Preferred **Messaging with Patients**
(that would put them most at ease about coming in)

- Explaining what to prepare for your visit and expect when you arrive and throughout the visit: 47%
- Explaining how they are handling any Coronavirus patients that may also be receiving care there: 37%
- Explaining how they will maintain social distancing throughout the facility: 36%
- Explaining how they are cleaning the facility: 35%
- Reassuring you that they have all the equipment and supplies for your procedure/surgery: 25%
- Providing a special phone number you can call with questions or concerns specifically about your visit: 20%
- Outlining options they have created for receiving your care at a different location or virtually if you want to be seen sooner: 19%
- Outlining what they are doing to help you with the cost of the visit before you show up: 18%
- Sharing up-to-date statistics on the number of staff who have tested positive and what they are doing to keep others safe: 18%
- A personal and emotional message from your doctor or hospital acknowledging your concerns and reassuring you that it is safe: 17%
- Sharing up-to-date statistics on the number of Coronavirus patients, including number of deaths, at the facility: 17%
- Showing you how providers and other staff will be dressed (i.e., wearing PPE) when you visit: 16%
- None of these: 8%

Let us explain how we are…
-or-
Here’s what we are doing to…

FDR Inaugural Speech: “Americans want action and action now.”
Key Take-aways

1) There will never be a better opportunity to build on the good will you have instilled in consumers and patients to grow your brand.

2) We’ve just proven to everyone that we can innovate quickly (i.e., remove our bureaucracy) and now they will expect us to continue innovating. In other words, our ‘new normal’ means we can’t go back to our old ways!

3) There definitely is opportunity to change behavior regarding where patients seek care (e.g., inpatient to outpatient procedures) and with whom (e.g., NPs/PAs), especially among those <45.

4) Position virtual care so that the PCP is the hero. Urgent care (whether physical or virtual) is considered ‘Plan B when my doctor fails to see me.’ Making sure to train your physicians on how to educate patients in using virtual care will make you all look well-coordinated and proactive, not disorganized and reactive. However, while virtual care is key, there are those who may still need more reasoning why it is a long-term solution to access.

5) Our new roadmap → provide options (i.e., solutions), learn fast, and be empathetic

6) Keeping patients? → Attitude and Access
Key Take-aways (cont’d)

7) Levels of concern and negative emotions are beginning to abate but remain significantly stronger among women and those <45. So, messaging may need to be more detailed on what you are doing to keep them safe.

8) Safety: Separation and protection just like we have been taught.

9) Costs: Lowering OOP costs such as establishing some type of payment forgiveness or extension plan.

10) Access: Virtual visits and extended weekday hours.

11) Method of communication: One size does not fit all. You need to be multi-method. And, you need to be proactive in driving consumers and patients to the sites you want them to go to (e.g., using SEO/SEM, social media, email, etc.).

12) Messaging: Focus on ‘Let us explain how we are...’ or ‘Here is what we are doing to...’ Consumers are finding comfort in calm, rational action-oriented facts. Remember FDR – “Americans want action and action now.”
Adjusting and Implementing New Operational Procedures

What Rush Health is doing to help patients come back in for care.
How we are keeping you safe

• Syndromic screening at the time of scheduling, evening prior and 90 mins prior to appt time
  • Anyone with symptoms would be converted to virtual

• Temp scanning at all entrances

• Universal masking of patients, visitors, staff

• No waiting in ambulatory sites

• Plexiglass at all front desk/ check-in areas

• ILI clinics to keep known symptomatic patients separated from healthy patients

• Isolation rooms for ILI patients

• POC testing for high risk aerosol generating procedures

• PCR testing within 72 hours for all other procedure and new infusion starts
Minimizing waiting

• Cell phone lot (for family accompanying those having procedures, infusions)
• Further adoption of virtual visits (keep 50% in-person and 50% virtual)
• Continued support of non-essential staff working from home
Communication that Creates Trust in Patients and Providers

Dalal Haldeman, PhD, MBA
Generate Trust

• Direct Message from Physicians
• Message from institution/clinicians
• Positioning advertisement
Life may be on pause. Your health isn’t.

LA IS BETTER TOGETHER

For those who stay in and those who work through the night.
For those who share their food and comfort, their hopes and fears.
For all that you’ve done in this great city of Angels, we see you and appreciate you.
Life may be on pause. Your health isn’t. We’re here to take care of you.
FINDING

Provider organizations are positioned to address consumer concerns.

There's good news for health systems when it comes to their ability to help consumers navigate challenging times after COVID-19 and get the care they need.

CONSUMERS ARE READY TO LISTEN TO YOUR RECOMMENDATIONS.

Over the course of the COVID-19 crisis, front-line clinical staff, hospitals, and health systems have experienced a sizable surge in consumer regard.

How has the COVID-19 outbreak affected your opinion about each of these sectors or service providers?

Research from Revive Health
Updates

Beyond the featured findings of this report, we’ve tracked consumer responses to a number of other questions over the past few weeks. The following updates show only the meaningful variations or noteworthy consistencies in the data from one survey to another.

**UPDATE #1: HOSPITALS, HEALTH SYSTEMS, AND PHYSICIANS ARE STILL THE MOST TRUSTED VOICES WHEN IT COMES TO COVID-19 COMMUNITY IMPACT**

Who do you trust the most to explain the unfolding coronavirus/COVID19’s impact on your household and your community?

- Local healthcare experts (e.g., hospitals and health systems, physicians, etc.):
  - Trust: 42%
  - No opinion: 58%

- National healthcare experts (e.g., CDC, DHHS, NIAID, etc.):
  - Trust: 29%
  - No opinion: 71%

- Local government agencies (e.g., state or local health department):
  - Trust: 23%
  - No opinion: 77%

- National news:
  - Trust: 95%
  - No opinion: 5%

- International healthcare organizations (i.e., WHO):
  - Trust: 91%
  - No opinion: 9%

- Local elected officials (i.e., news, social media, interviews, or content):
  - Trust: 85%
  - No opinion: 15%

- National elected officials (i.e., President or Congress):
  - Trust: 50%
  - No opinion: 50%

**UPDATE #2: TELEHEALTH AWARENESS STILL RISING**

Have you heard of telehealth or virtual care?

- March 17, 2020: 58% No, 42% Yes
- March 30, 2020: 71% No, 29% Yes
- April 14, 2020: 77% No, 23% Yes
UPDATE #4: CONSUMER MOODS ARE TURNING UP SLIGHTLY (CONT'D)

How would you rate your current mood based on the current pandemic's impact on your local area?

- Concerned
- Anxious
- Hopeful
- Frightened
- Confident
- Calm
- Fearful
- Hopeless

- Below average
- Average
- Above average

UPDATE #5: THE HORIZON FOR WHEN THINGS WILL BE “BACK TO NORMAL” GOT FURTHER AWAY

How long do you think it will take for life to get back to normal?

- 2 - 4 weeks
- 4 - 8 weeks
- 3 - 6 months
- 6 - 9 months
- Next year
Most trusted source for patients who have a physician is the physician

- Calls
- Video
- Email and MyChart message
- The where and how
- Patient navigators
- Clarity, consistency
Beginning today, our Ohio and Florida locations are resuming outpatient appointments, surgeries and procedures paused due to COVID-19.

FOR YOUR SAFETY AND THOSE AROUND YOU, we have taken the following steps:

- Limited and screened visitors
- Continued extensive cleaning
- Required masks for our caregivers

WE ASK THAT YOU HELP US maintain a safe environment by:

- Practicing social and physical distancing
- Wearing a mask while in our facilities
- Washing and sanitizing your hands
How Will COVID-19 Influence the System of CARE Long-term?

Rapid Increase in Virtual Visits
- Novant Health: 200 video visits a year increased to 12,000 a week
- UC San Diego Health: 65% of virtual visits increased to >50%
- Partners HealthCare: 1,600 per month to 60,000 per month

After the surge: Hospitals prep to bring back regular patients while virus cases linger

Thousands of procedures have been pushed back because of COVID-19. Now hospitals have to make it safe for those patients to return.

By Liz Kowalczyk Globe Staff
Updated May 2, 2020, 2:46 p.m.

Ambulances sat outside Massachusetts General Hospital. BLAKE NISSEN FOR THE BOSTON GLOBE
Key Drivers for Communications Planning

• Operational decisions and shifts
• Ability to act without having the complete picture
• Staff engagement and a two-way communication
• Strategic focus on consumer’s thinking and needs and on referring physicians
Reviving the Revenue Engine

- Consumer confidence
- Clarity for referring physicians
- Surgery restart
- Business prioritization
- Accelerating new or innovative sources of revenues
Marketing and Communication Audiences

• Staff & constituents
• Patients/visitors
• Federal/state funding
• Referring physicians and physician network
• Payors
• Partners
• Media/reporters
• Technology partners
Vicki Amalfitano, Principal
Instructor, Harvard T.H. Chan School of Public Health

10-Step Checklist for Post-Pandemic Hospital Marketing:
*Considerations for a strategic resumption of paid, owned and earned media*

Hospitals and health systems made rapid-fire, dramatic organization-wide changes when Covid-19 overran their communities. Command centers opened indefinitely, elective procedures were postponed, ambulatory care went digital, and inpatient care units became ICUs.

Marketing and communications teams also went “full-Covid” 6-8. I advised clients struggling early on to redeploy marketing staff to internal and external communications, and as additional content support to digital teams, to meet the enormous communications needs of their executive team and managers.
Five Checklist Highlights for Marketers from Dalton Marketing Advisors

• Take a hard look at your brand strategy
• Evaluate your agencies and third-party partners to recalibrate
• Create a multi-phased recovery marketing and communications plans
• Reconnect DIRECTLY with your patients
• Do not forget your physician engagement strategy
Positioning Statements During Recovery

- We’re ready, safe and open
- Get care when you need it
- Emergencies do not stop, neither do we
- Our hospitals continue to provide life-saving care
- We are ready for you
- Life may be on pause, your health isn’t
- In this together
- Cleveland Clinic is here to care for you and your loved ones
- Your safe destination for face to face
- We are here for you
THANK YOU

What questions do you have?
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