

Unlocking the Power of Your Data with AI & Customer Experience Platforms



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Outline/Agenda

- Bridging Gaps with Technology - Evolution
- Where We Are Today
- The Data Cloud Paradigm Shift
- The Hartford Journey
- Powerful Data Use Cases
- Q&A

Nobody but a farmer wakes up one morning and decides to build a silo – yet that’s exactly what has happened, naturally, over the past decades.

Customer Data Platforms: Use People Data to Transform the Future of Marketing Engagement, Martin Kihn & Chris O’hara

The Consumer Experience Gap

73%

of healthcare consumers expect companies to understand their unique needs

Providers

Care from Anywhere

Clinician Burnout

Data & Regulation Changes

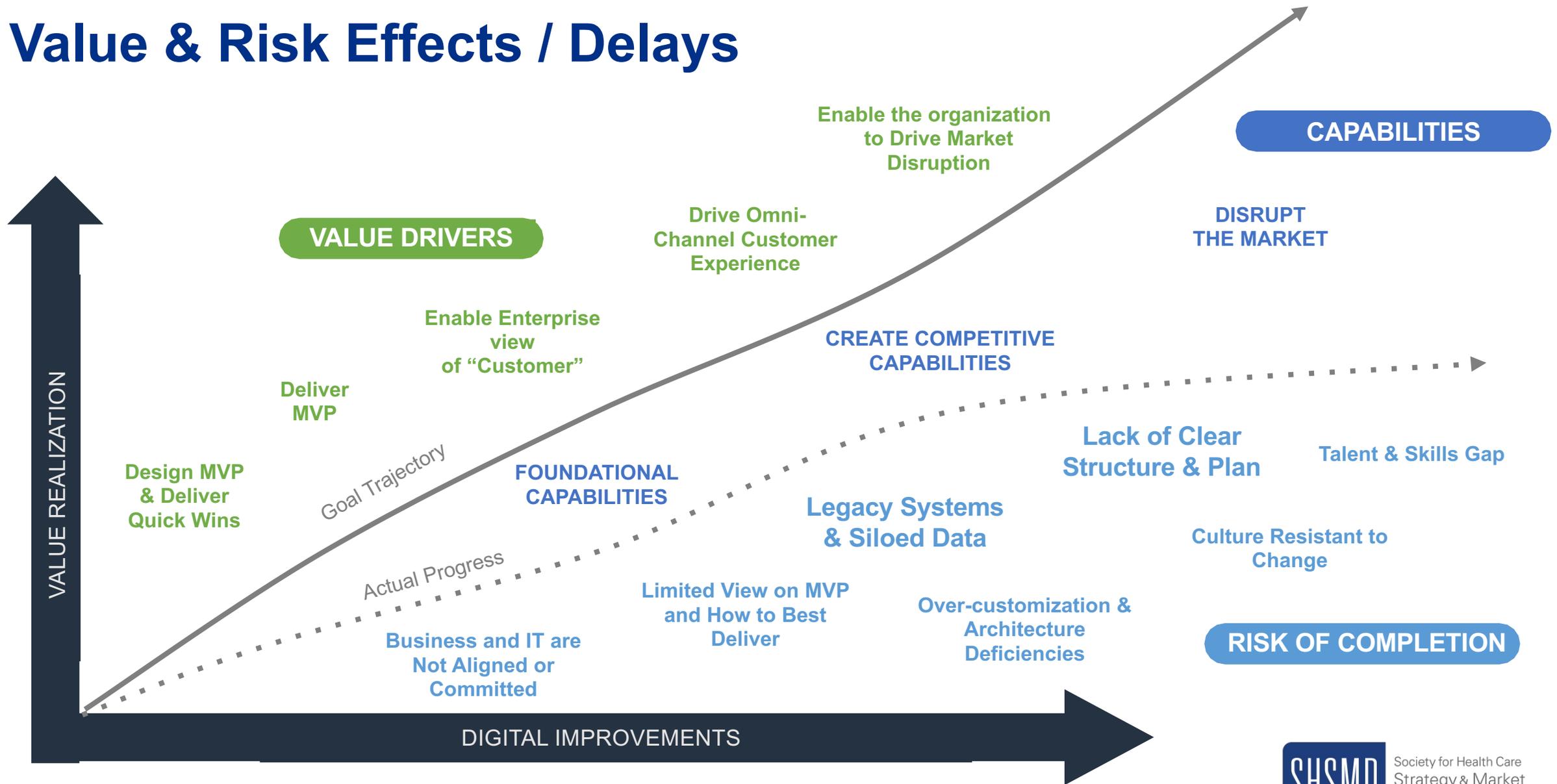
Departmental Silos

Unique Relationships

New Care Alternatives

Consumers

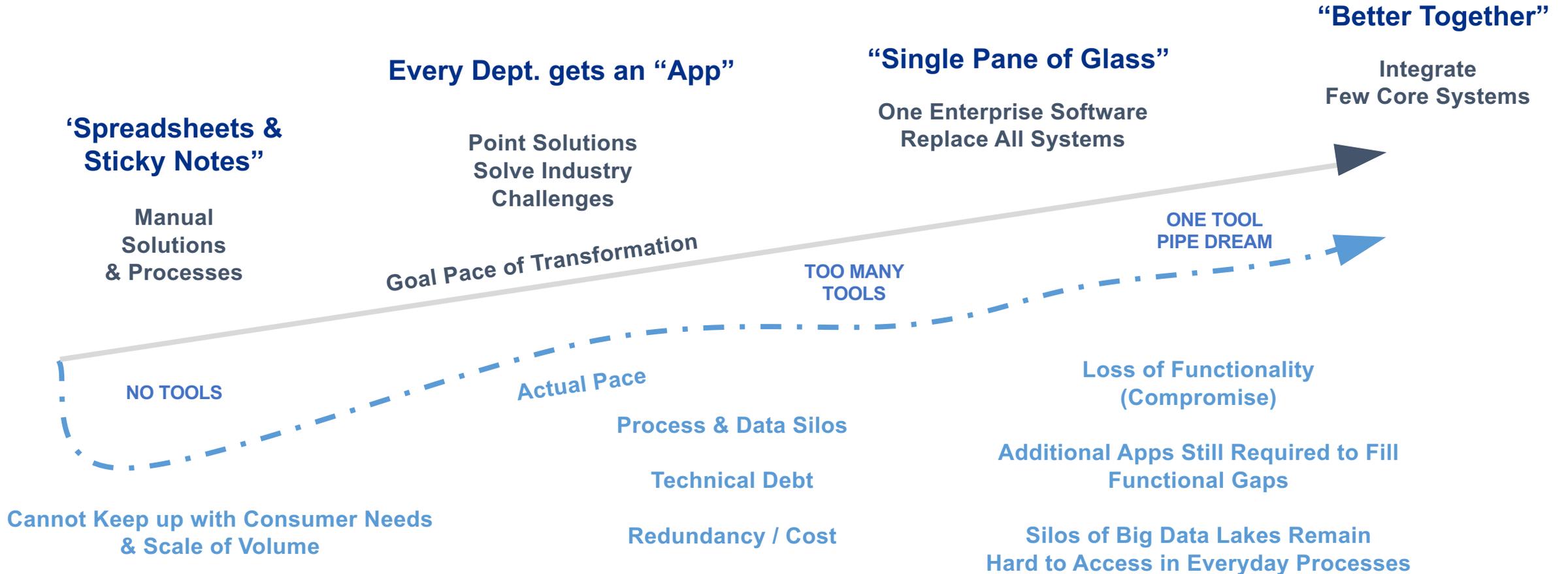
Value & Risk Effects / Delays



The Good News to “Late Adoption”

- Other Industries Have Paved the Way in the Consumer Experience Technology
 - Retail & Hospitality > Experience as important as Product
Utilization of **Big Data & Personalized Marketing**
 - SaaS High Tech > Focus on Adoption, Customer Success, Renewals
Utilization of **Big Data & Personalized Marketing**
 - Manufacturers & Professional Field Services > Home Health Mobile Platforms
Utilization of **ERP & CRM “Better Together”**
Utilization of **IoT**
Utilization of **B2B Marketing / CRM** > PRM
 - Large Commercial Contact Centers > **OmniChannel** Contact Centers

Technology & Speed Bumps



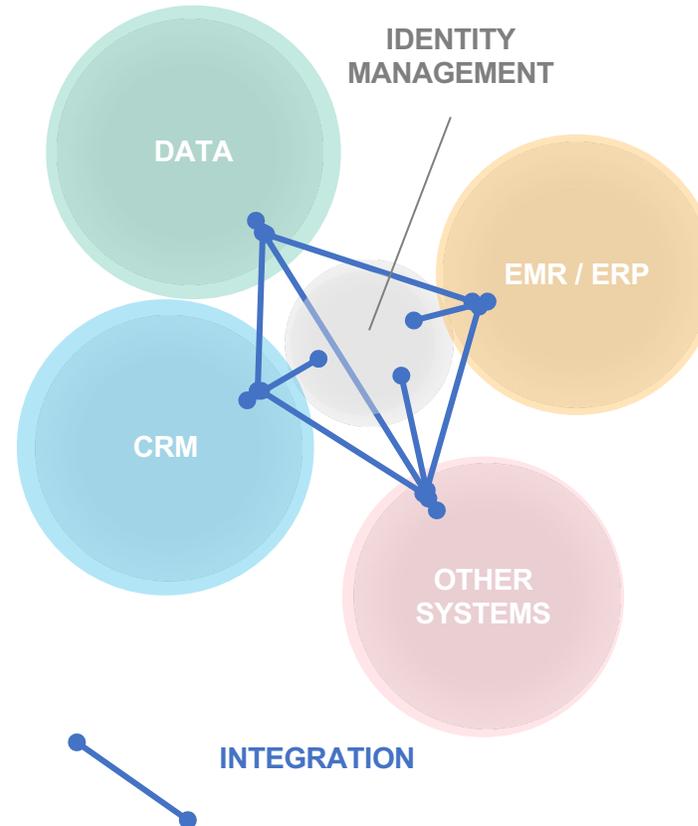
2021-2023

“Better Together”

Best Core Platforms
Enterprise Analytics

Integration/Connection
Complexity

Restructuring of Enterprise
To Centralize Data/Platforms
Difficult



The modern day integrated enterprise has a solid foundation of identity and essential data for specific personalization.

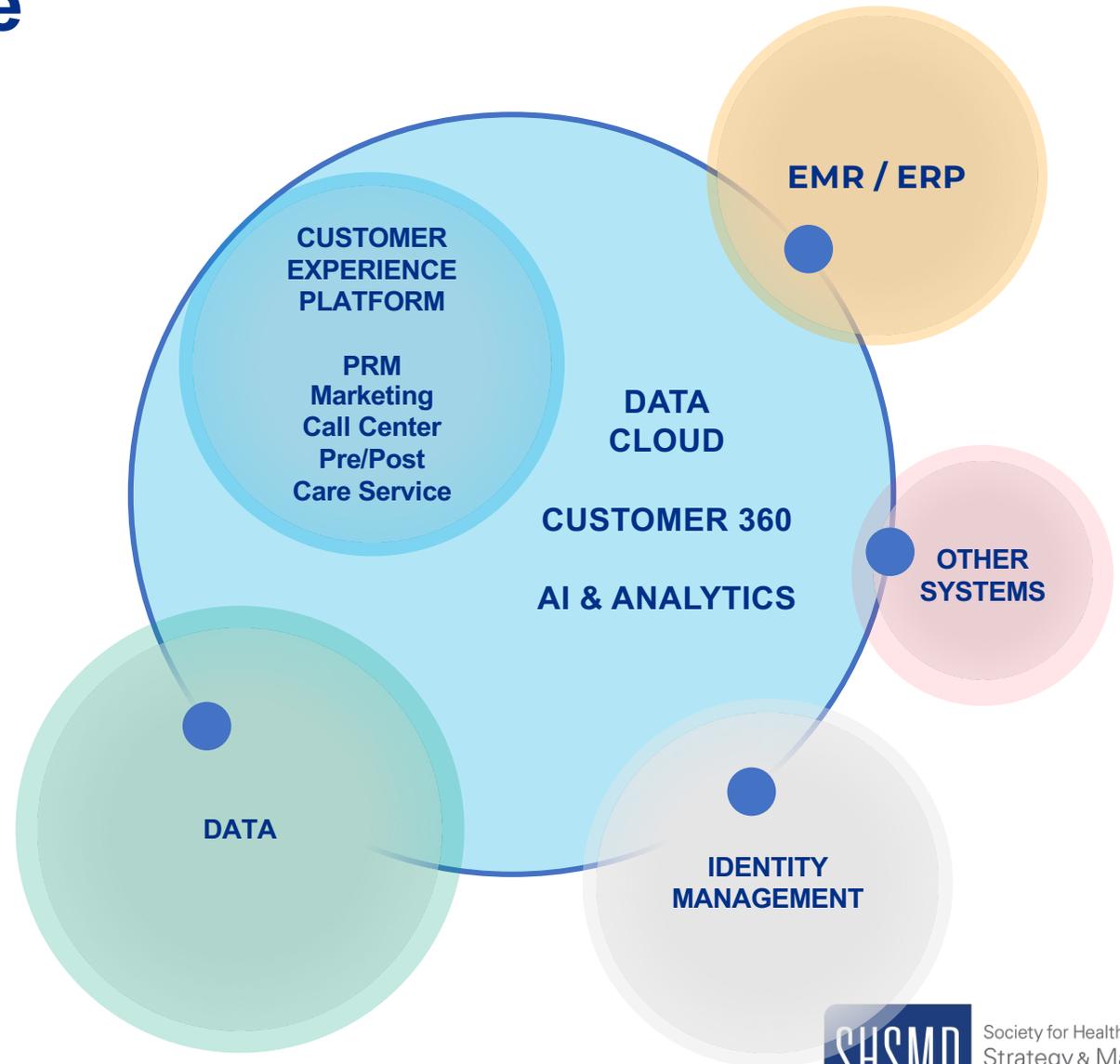
Data & AI Centric Enterprise

The next evolution is building an enterprise data cloud.

Rapid personalization is available from large data, **simple and fast to incorporate into reusable assets.**



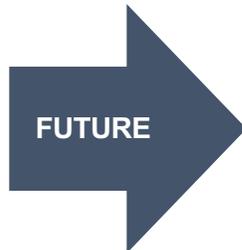
● CONNECTORS



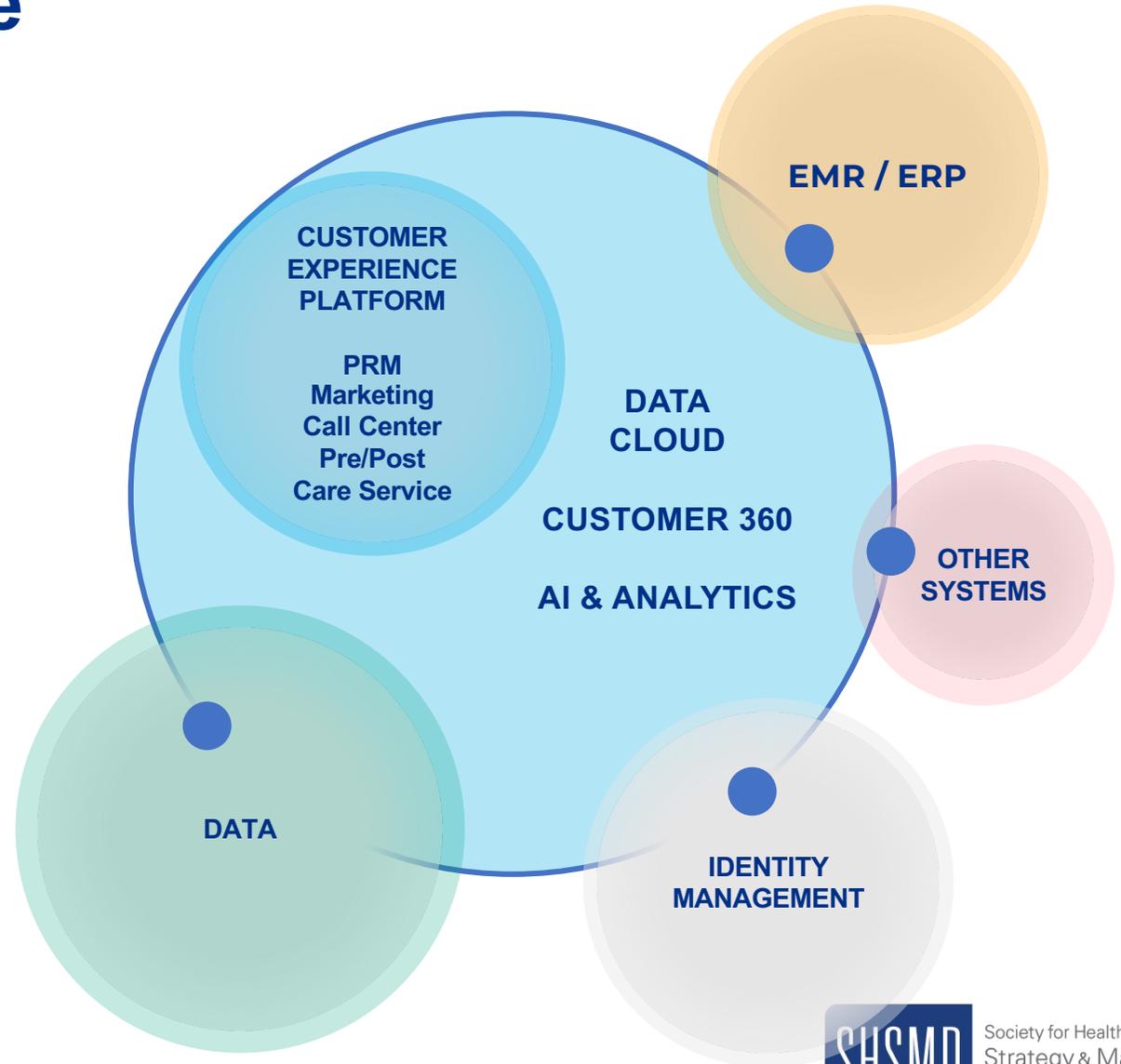
Data & AI Centric Enterprise

Connecting Data into the system **does not first require IT complex translation** as it is put into the cloud.

It is not an integration in the traditional way.

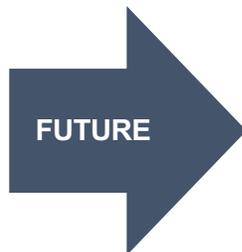


 CONNECTORS

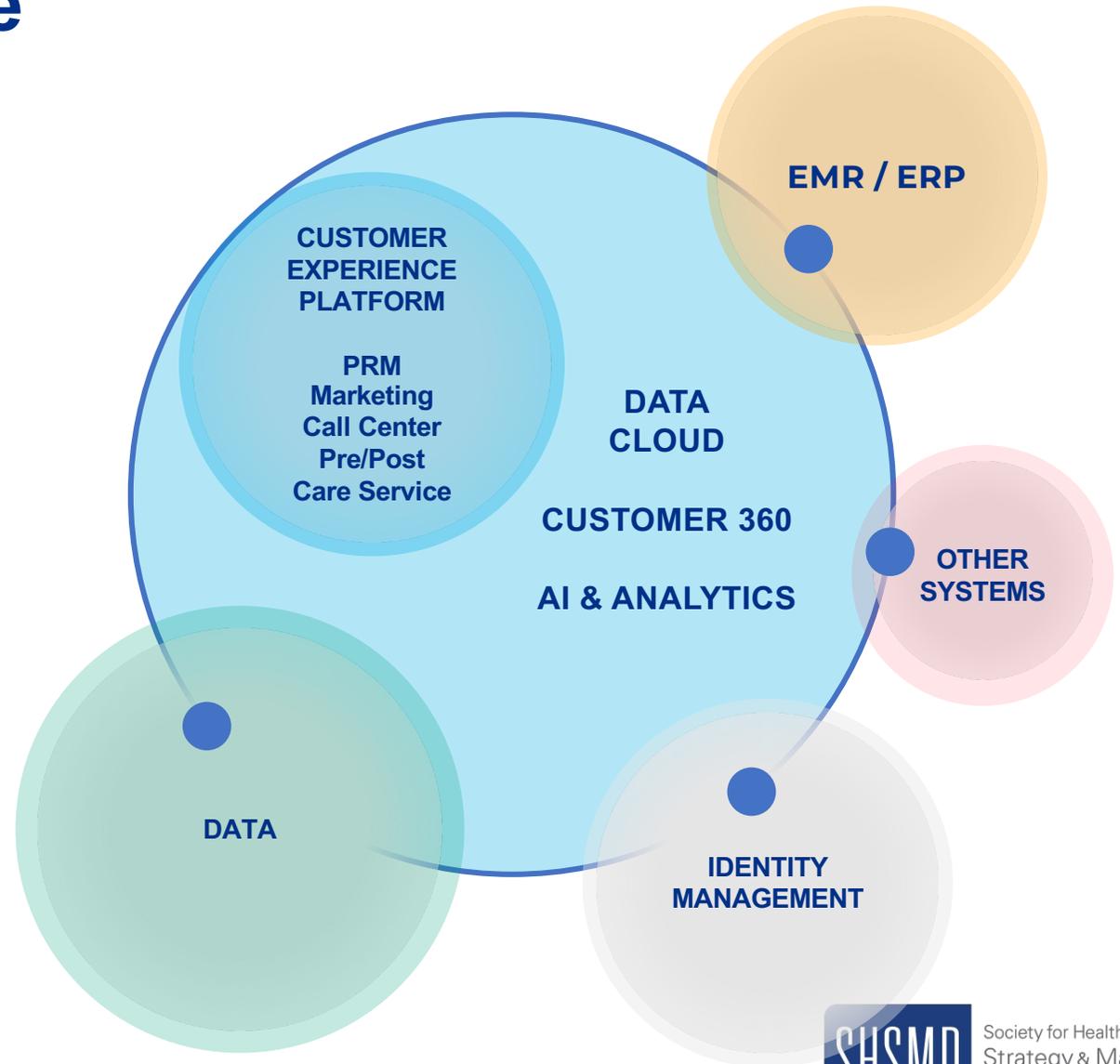


Data & AI Centric Enterprise

After IT connects the data into Data Cloud, the remaining work is done side-by-side with the business. A data modeler and the business click attributes and define them based on business definitions. Then it is ready to use by everyone.



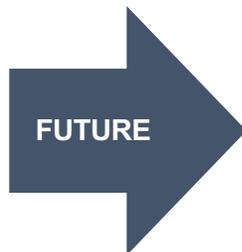
● CONNECTORS



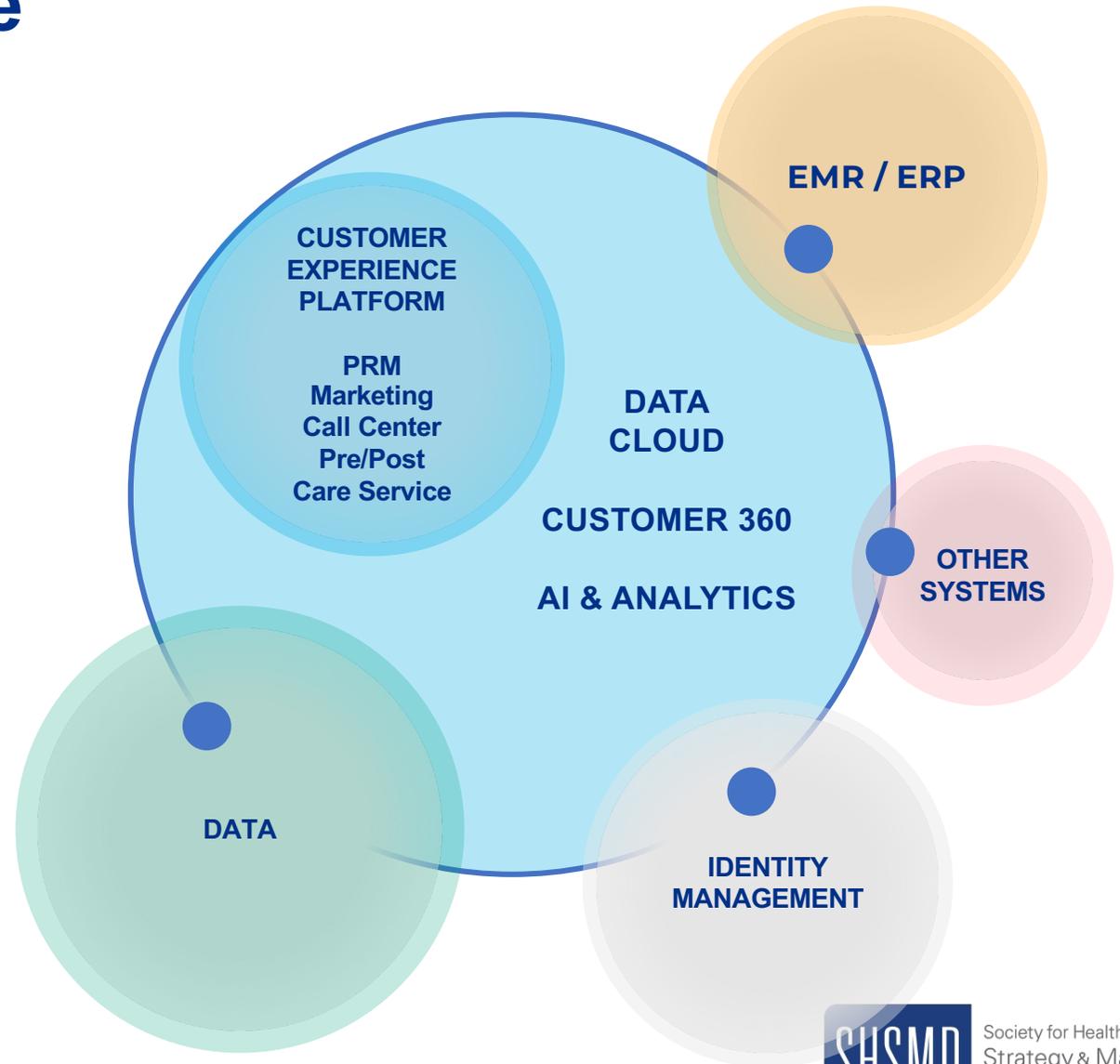
Data & AI Centric Enterprise

Personalization is now leveraged easily at scale. Marketing & Sales can fully leverage it.

Data can also be displayed anywhere on pages to drive a richer customer 360.



● CONNECTORS



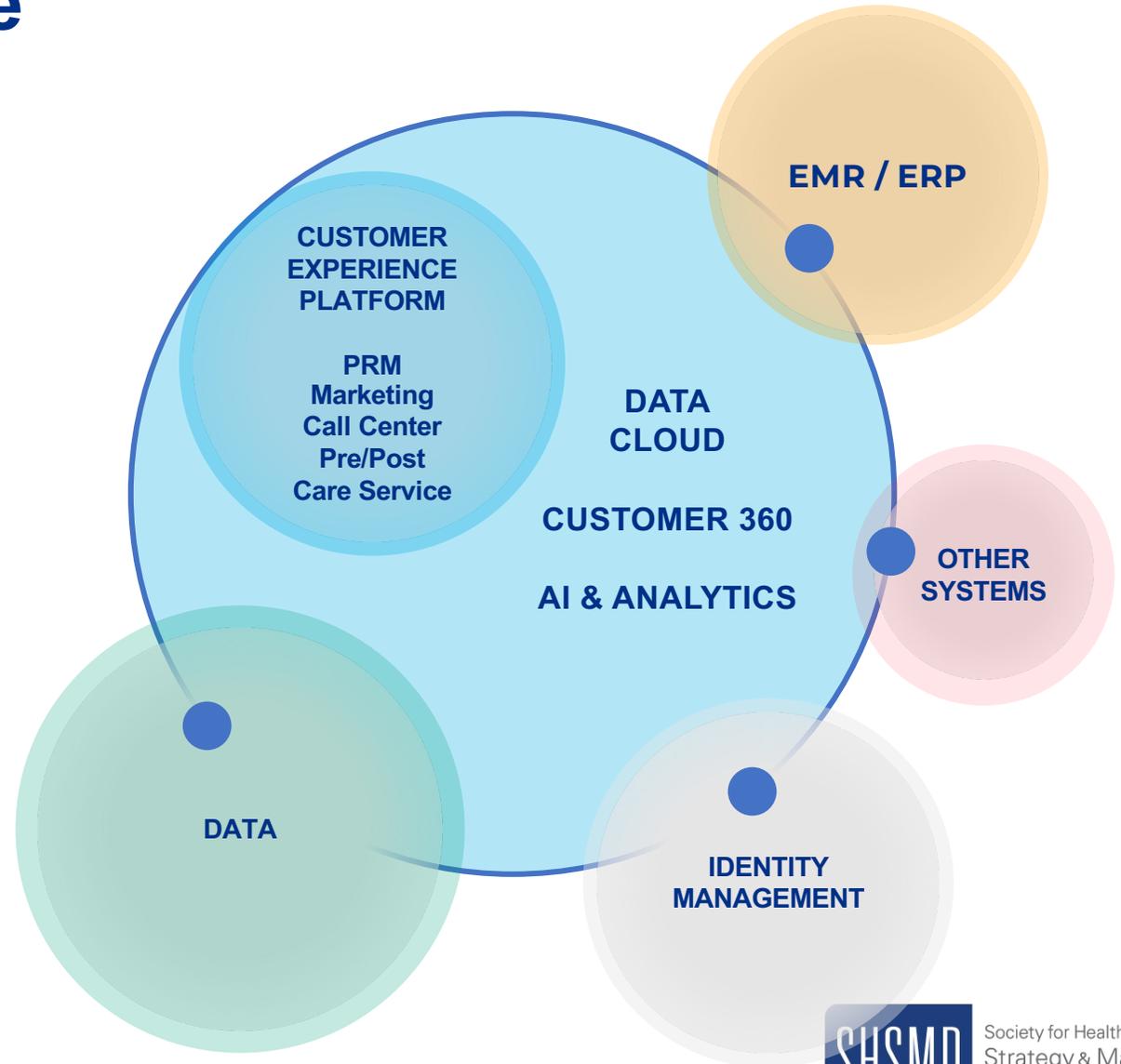
Data & AI Centric Enterprise

As the enterprise and technology evolve, AI will utilize the data to unlock full potential.

Predictive AI Models are already being built in CRM analytics and GPT tools are live for Customer Service & Sales teams.



● CONNECTORS



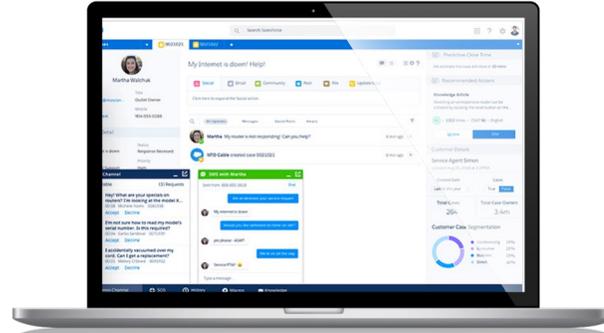
AI & GPT Capabilities



AI PREDICTIVE MODELING

AI analyzes select data, producing recommended factors to select for a predictive model. Viewing the AI insights allows you to choose factors to **predict if or when something is likely to occur.**

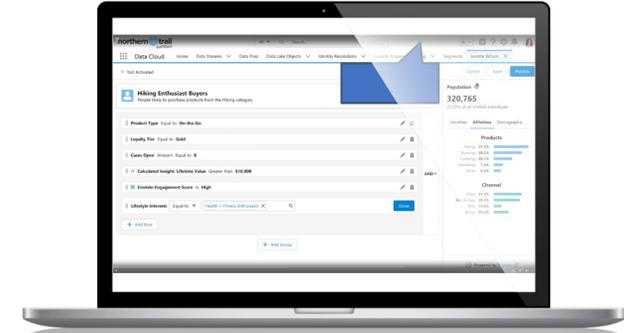
Once done, you can use the predictive data to build insightful analytics dashboards for decision making, update actions for teams, and run marketing campaigns.



GPT HELPING HUMANS

AI analyzes knowledge, internal data and transcriptions of live calls to recommend solutions to agents or via chatbots to **provide best in class customer service.**

The same technology is utilized to help craft effective emails and landing page content, all with your secure data.



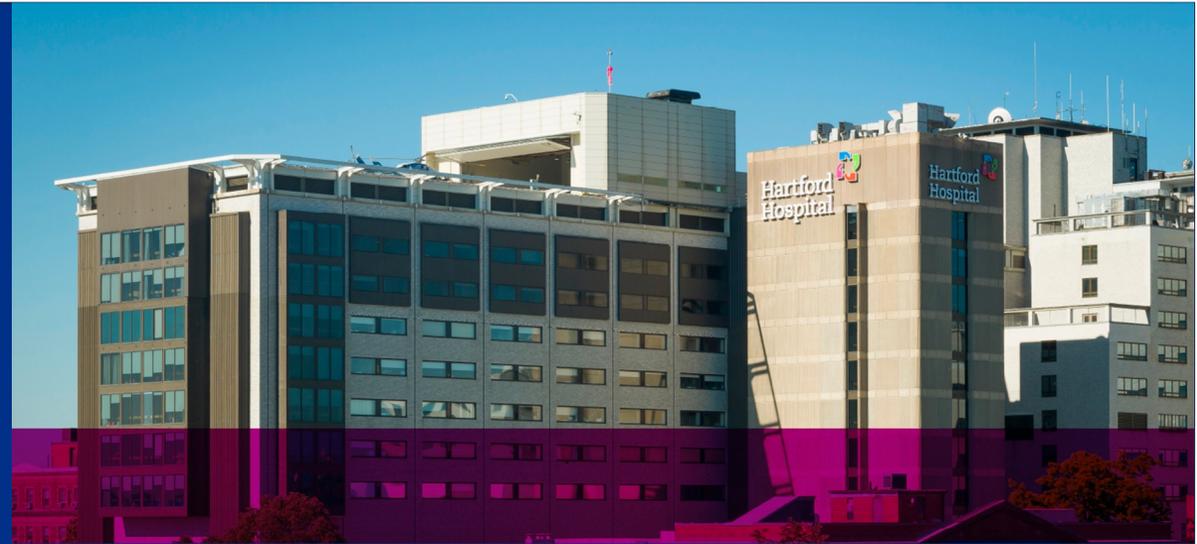
PROMPTS REPLACE CLICKS

(Coming Soon)

Eliminate learning curves of tool use by not only using clicks not code, but voice and text statements to query information used for reporting and segmentation. This is already available in standard CRM questions but will be generally available for analytics and marketing.

Hartford HealthCare 

Our Journey



Strategic Choice

From renters to owners

- Legacy service-based platform support and contract ending
- Control our own destiny
 - Desire to own and manage our own data
 - Insulate ourselves from vendor revolving door
- Digital marketing has become a core-competency
- Build a scalable marketing technology platform for the future
 - LLM and Ai
 - Enterprise use

Evolving Business Needs

- **Our Needs Demanded More Capability from our Technology:**
 - Get Data out of the “Black Box” and into a usable and transparent format
 - Leverage the native tools that had exceeded the capabilities of the purpose built app
 - Visualize and automate all of our data and reporting
 - More segmentation power for personalization
 - Visualize and operationalize marketing by Service Line



Marketing Cloud



Health Cloud



Data Cloud

Marketing Intelligence Benefits

Our goals to leverage the power of data

| BEFORE | AFTER | BENEFIT |
|--------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| Revenue Attribution was a Black Box, with limited ability to verify and modify | Data brought in-house & Integrated Agency data | Transparency & time savings Identify Data-Driven KPIs Remove Guesswork, Defined & Relationally Connected |
| Monthly Encounter Data Feeds Limited Marketing Automation Options | Daily Encounter Data Feeds Ability to track calls and conversion rates Automated cross-channel, interactive dashboards Insight into Campaign Performance | Informed Strategic Decisions Campaign & Budget Optimization Reduce load on team Quick deployment |
| Time-consuming Manual Performance Analysis Reporting | Automated cross-channel, interactive dashboards Share filterable dashboards via Link & PDF | Marketing & Exec Alignment Volume increase in key speciality area |

Major Benefits

- Cloud platform foundation ready to leverage the power of Ai, for meaningful 360° view
- Leverage cloud computing platform for heavy data processing, limited within Health Cloud
- Timely and actionable automation journeys, from multiple data sources
- Slow or stop the compounding cost escalation from adding contacts to marketing cloud
- Intelligent consumer and patient targeting, with propensity models and media consumption habits

Our Experience

■ How are we doing along our goals?

- Successfully migrated all campaigns & landing pages
- Successfully migrated Marketing Cloud to new business unit

■ What's Next?

- Finalize data integrations, encounters, financials, demographics and call center
- Load consumer data profiles
- Load propensity models
- Finalize revenue attribution modeling
- Connect data into Marketing Cloud Intelligence

Lessons Learned

- Approvals & Funding
- Legal and Compliance
- IT Security
- Alternate visions for digital transformation
- IT proceeds and timing

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Powerful Data Use Cases

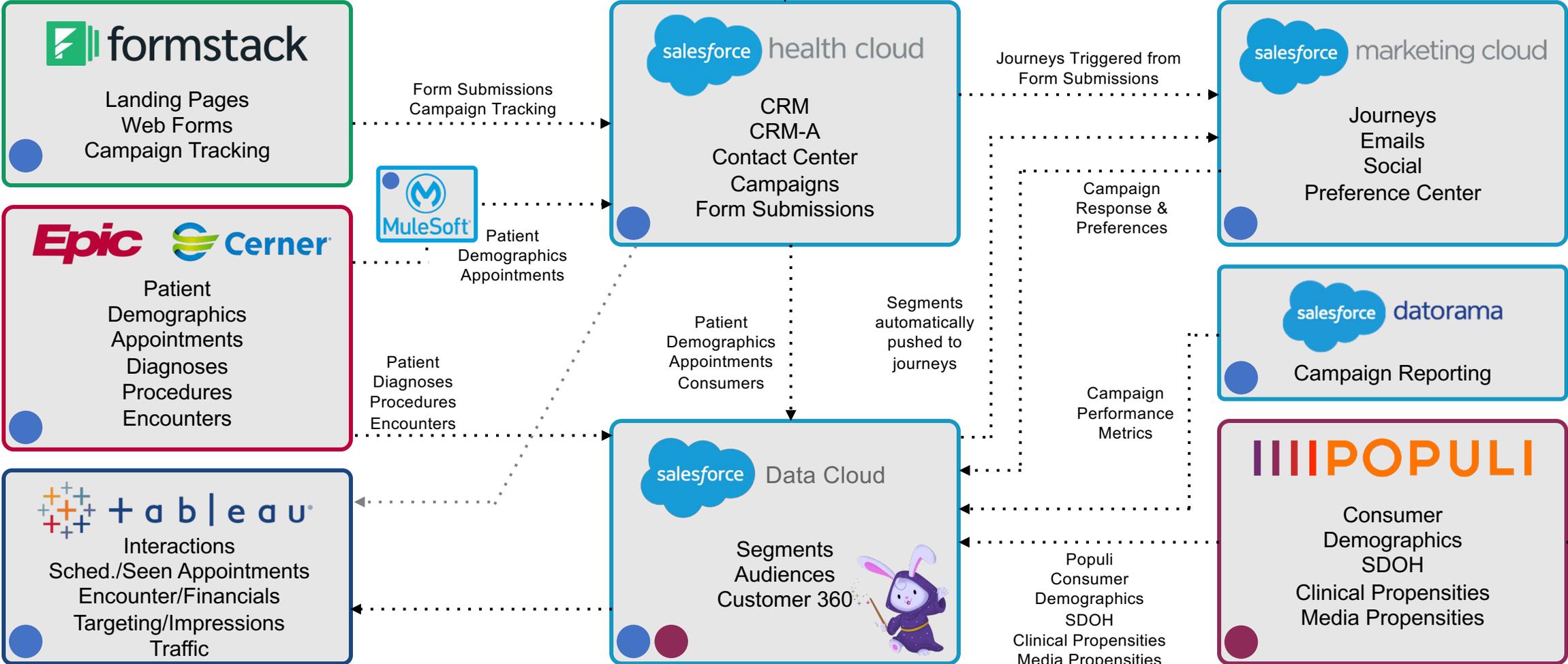
Enhance Consumer & Patient Profiles

Over 800 attributes



| | |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------|
| Core Demographics | Race, gender, birthdate, household size and composition, language, marital status |
| Lifestyle Segments | Predefined Lifestage and activity population segments |
| Education | High School, College Degree, Vocational Training |
| Economic Indicators | Household income, occupation, credit scores, purchase behavior, debt, home rent vs ownership |
| Transportation Access | Ownership, public transportation usage, rideshare and ride service usage |
| Health Behavior Indicators | Eating, smoking, drinking, exercise, lifestyle choices, stress levels, dieting |
| Health Service Use | Wellness visits, Ed usage, PCP, Telehealth users, medication adherence |
| Technology Usage | Ownership and usage of mobile phone, tablet, laptop, wearables |
| Media Propensities | Social, ecommerce, ideal channel targeting |
| Clinical Propensities | Procedure and Condition propensities defining likelihood to have a disease/condition and require health services |

Marketing Ecosystem



EXAMPLE: CABG Campaign

CRM Analytics

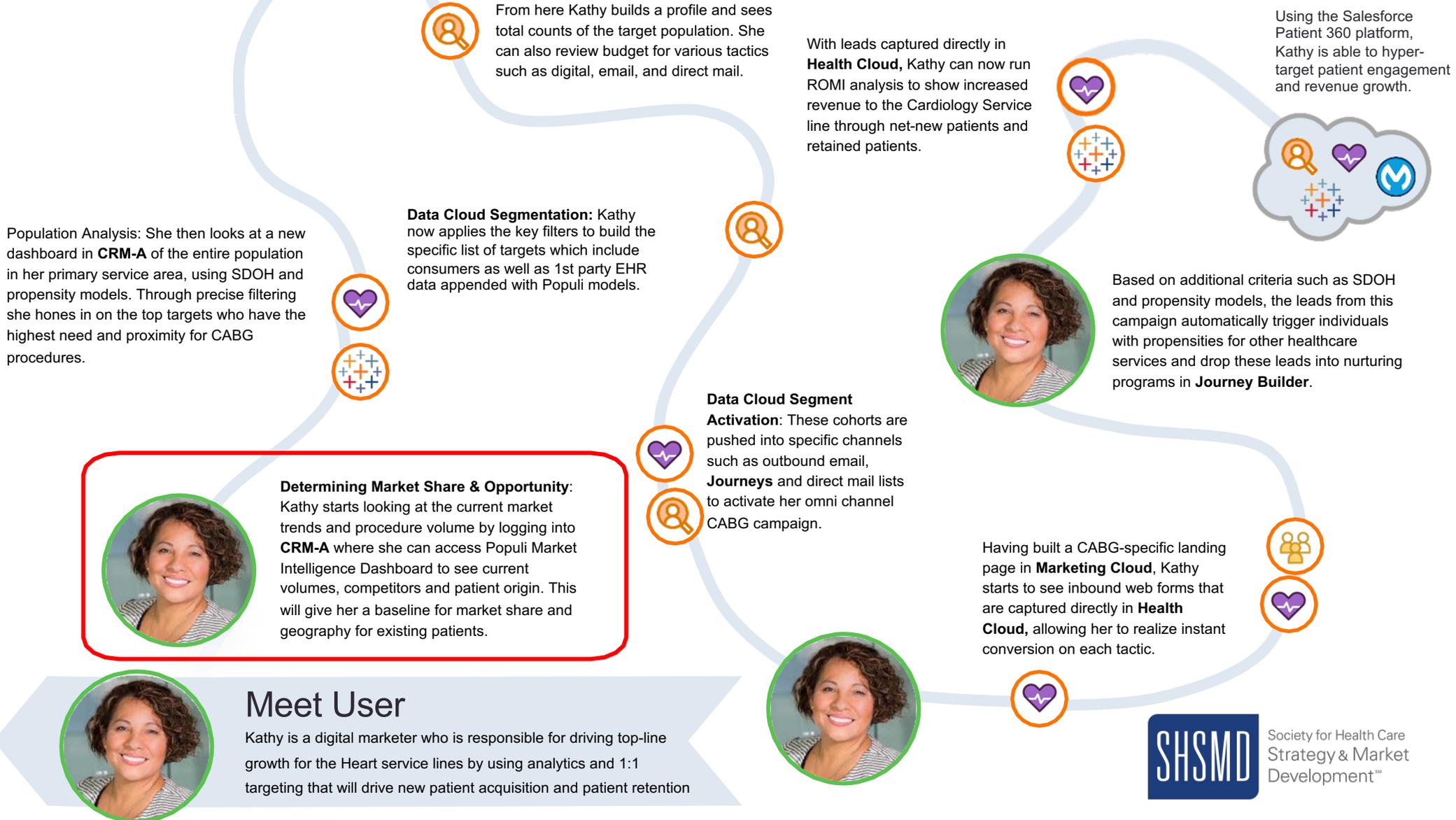
Marketing Cloud

Data Cloud

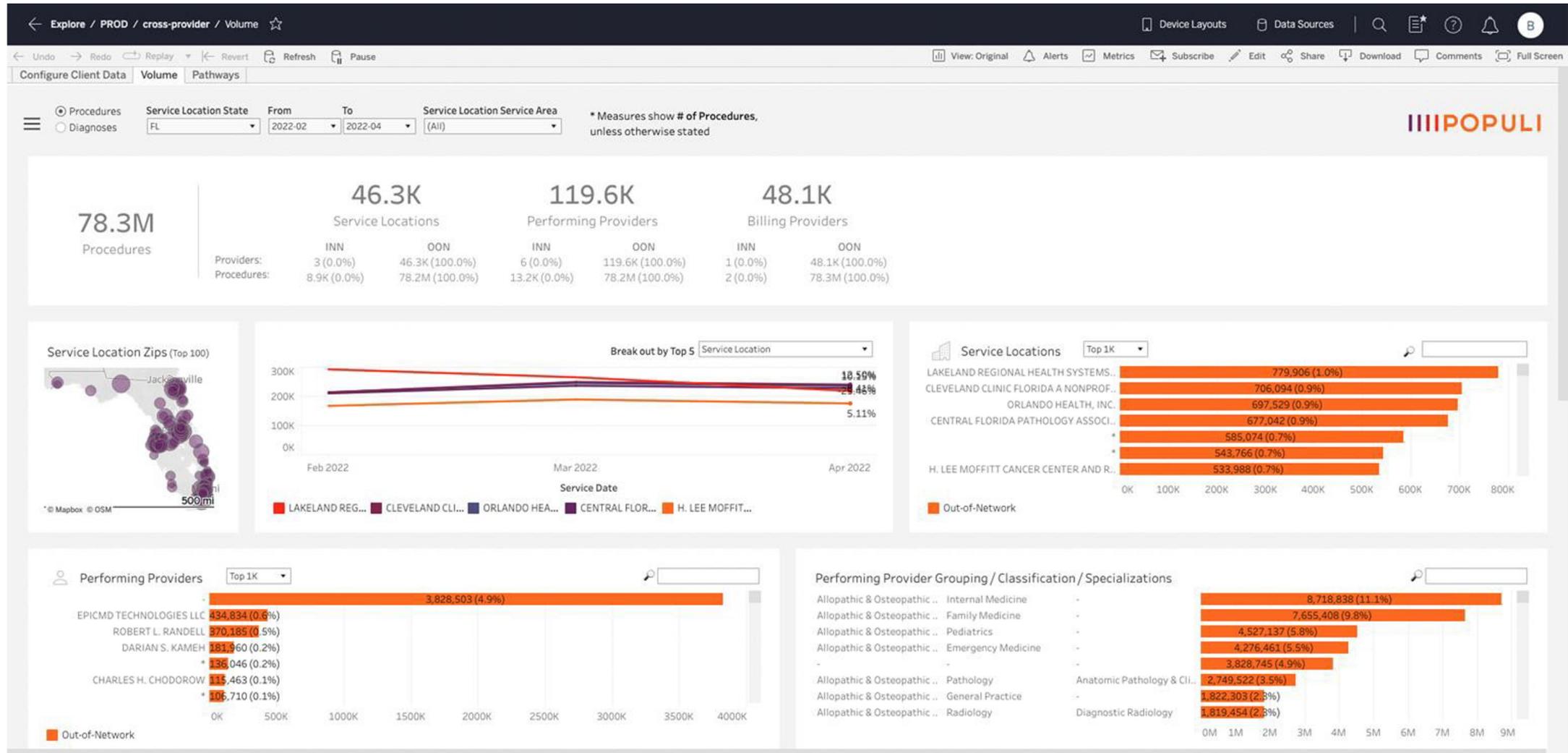
Health Cloud

Datorama

Mulesoft

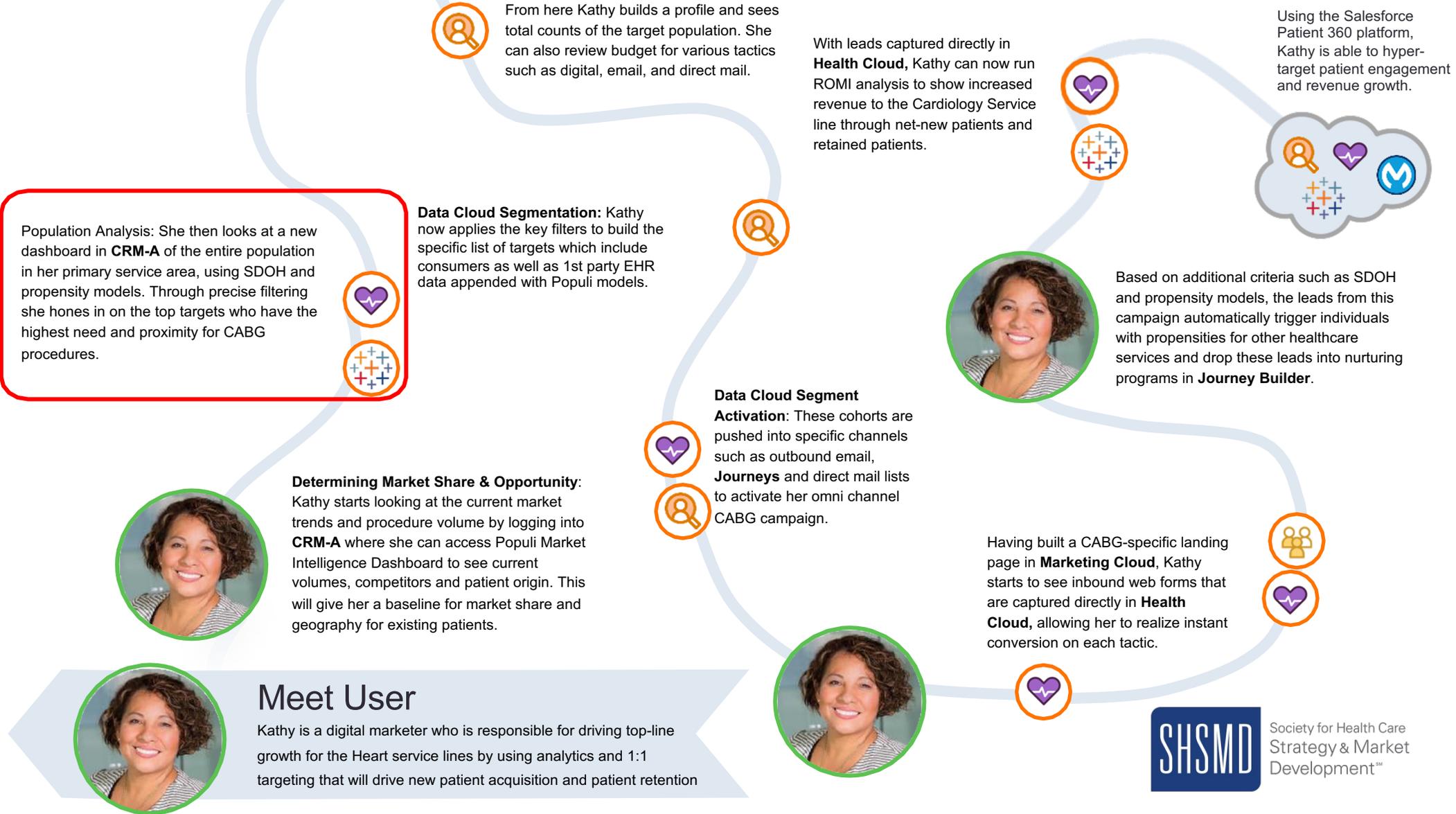


Population Intelligence - Market Viewer - Determining Market Share & Opportunity for CABG Campaign

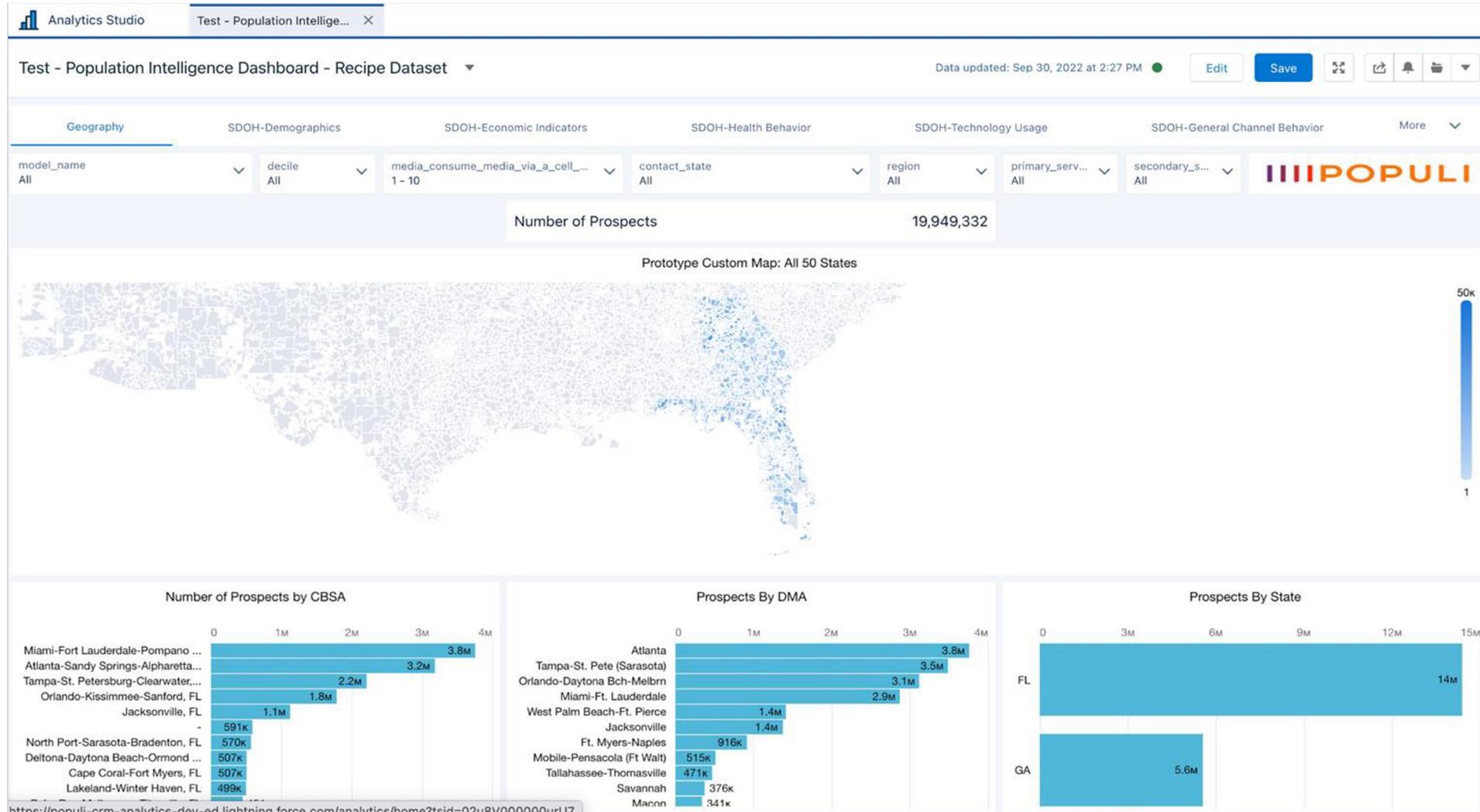


EXAMPLE: CABG Campaign

-  CRM Analytics
-  Marketing Cloud
-  Data Cloud
-  Health Cloud
-  Datorama
-  Mulesoft



Population Intelligence - CRM-A Dashboard - Consumer & Propensity Analysis



EXAMPLE: CABG Campaign

CRM Analytics

Marketing Cloud

Data Cloud

Health Cloud

Datorama

Mulesoft

Population Analysis: She then looks at a new dashboard in **CRM-A** of the entire population in her primary service area, using SDOH and propensity models. Through precise filtering she hones in on the top targets who have the highest need and proximity for CABG procedures.



From here Kathy builds a profile and sees total counts of the target population. She can also review budget for various tactics such as digital, email, and direct mail.

Data Cloud Segmentation: Kathy now applies the key filters to build the specific list of targets which include consumers as well as 1st party EHR data appended with Populi models.



Determining Market Share & Opportunity: Kathy starts looking at the current market trends and procedure volume by logging into **CRM-A** where she can access Populi Market Intelligence Dashboard to see current volumes, competitors and patient origin. This will give her a baseline for market share and geography for existing patients.



Meet User

Kathy is a digital marketer who is responsible for driving top-line growth for the Heart service lines by using analytics and 1:1 targeting that will drive new patient acquisition and patient retention



With leads captured directly in **Health Cloud**, Kathy can now run ROMI analysis to show increased revenue to the Cardiology Service line through net-new patients and retained patients.



Based on additional criteria such as SDOH and propensity models, the leads from this campaign automatically trigger individuals with propensities for other healthcare services and drop these leads into nurturing programs in **Journey Builder**.



Data Cloud Segment Activation: These cohorts are pushed into specific channels such as outbound email, **Journeys** and direct mail lists to activate her omni channel CABG campaign.



Having built a CABG-specific landing page in **Marketing Cloud**, Kathy starts to see inbound web forms that are captured directly in **Health Cloud**, allowing her to realize instant conversion on each tactic.



Using the Salesforce Patient 360 platform, Kathy is able to hyper-target patient engagement and revenue growth.



Population Analytics - Data Cloud Segmentation - Segment Building

Segment
Populi Mammo Reminder Segment

Segment On Consumers Publish Schedule Don't refresh

Edit Properties Done

Attributes **65** Population Remainder

Segment Status Active Save

Search Attributes

Direct Attributes (5)

- Consumers (76)
- Individual (7)
- Patients (34)
- Unified Individual 1 (5)
- Unified Link Individual 1 (6)

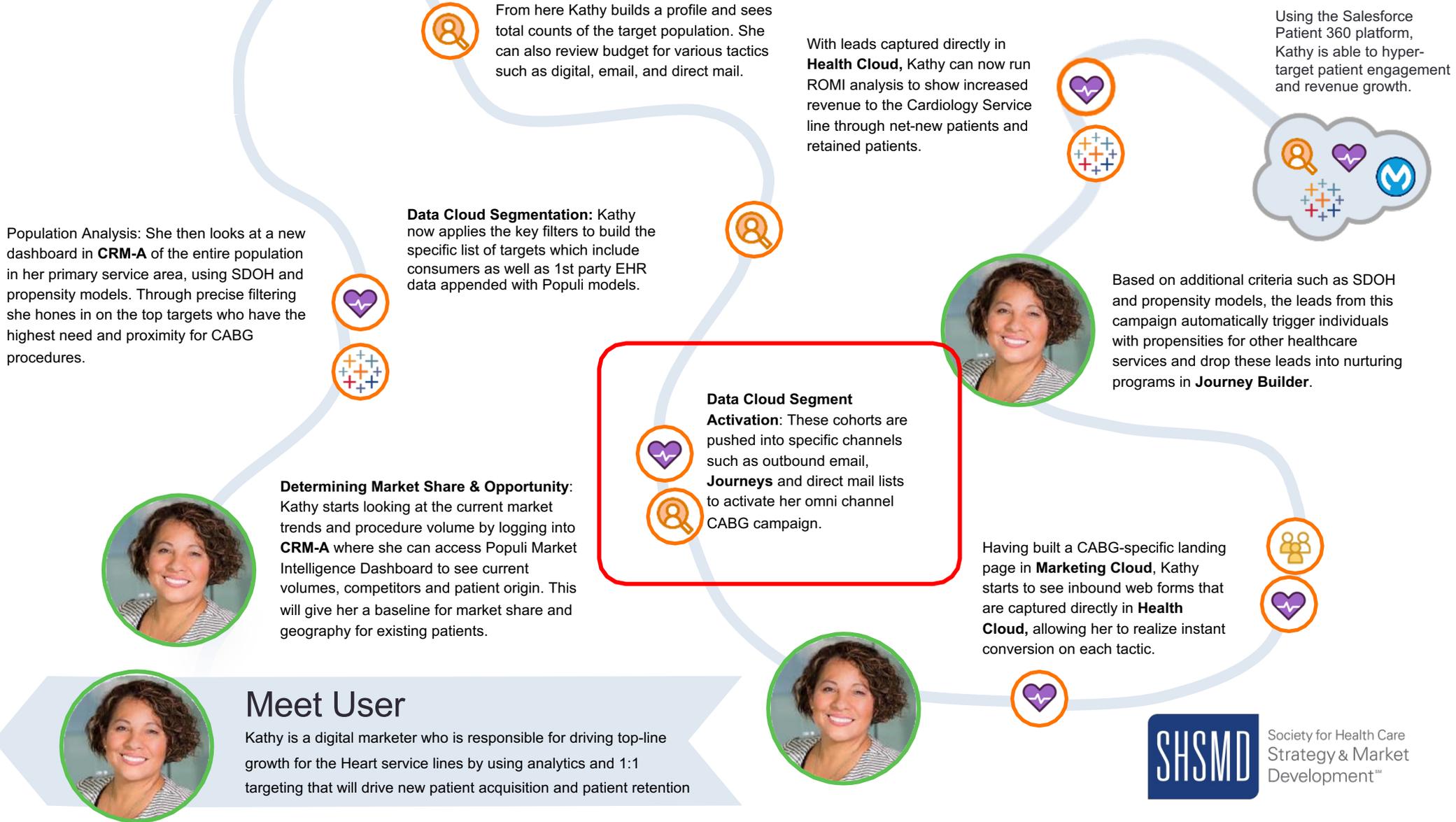
Related Attributes (3)

- clinical_mammo_screening_decile Is Greater Than 5
- contact_date_of_birth Is Between 1962-08-01 AND 1992-08-01
- contact_state Is Equal To FL
- emaiLOPTout Is Equal To FALSE
- deceased Is Equal To FALSE
- medicalrecordnumber Is Not Equal To Null
- Procedures: Count Exactly 0**
procedure_code Is Equal To 77056
- Encounters: Count Exactly 0**
discharge_date_time Is Between 2021-01-01 AND 2022-08-01

+ Add another Attribute here

EXAMPLE: CABG Campaign

- CRM Analytics
- Marketing Cloud
- Data Cloud
- Health Cloud
- Datorama
- Mulesoft



Population Analytics - Data Cloud Segment Activation to CABG Journey



Activation Target Salesforce Marketing Cloud CABG Acquisition Journey Activation Target

Edit

| | |
|-----------|---------------|
| Platform | Target Status |
| Amazon S3 | Active |

Related **Details**

Information

| | |
|-----------------------------------------------------------------------|-----------------------------------------------------------|
| Name | Description |
| Salesforce Marketing Cloud CABG Acquisition Journey Activation Target | Salesforce Marketing Cloud CABG Journey Activation Target |
| Platform | Target Status |
| Amazon S3 | Active |
| Created By | Last Modified By |
| Populi Developer, 10/20/2022, 4:49 AM | Automated Process, 10/20/2022, 4:49 AM |

Three Key Take-Aways

- Please include three take-aways (should relate to your learning objectives) that attendees should have gained from your presentation.
- If possible, translate into action steps. I.e.) How can they implement some of these take-aways upon their return to their organization?
 1. Key take-away
 2. Key take-away
 3. Key take-away



Questions?

Milissa.Holland@CoastalCloud.US

Please be sure to complete the session evaluation!



Speaker Biography(s)

- Create a separate slide for each speaker.
- Include name, title, organization and email address.
- Provide a brief bio for each speaker – limit of 100 words.
- You may place your company logo on the speaker bio slides only.

Bibliography/References

- Insert your references here.