GEEK OUT, DON’T FREAK OUT: HOW TO DO MORE WITH DATA

ANGIE VILLAMARIA, DIRECTOR OF PROVIDER SOLUTIONS
NIKKI HEIDER, HEAD OF CONTENT MARKETING
TODAY’S EXPERTS

Bringing You New Data & Insights

Angie Villamaria
• Director, Provider Solutions
• Wellbeing innovator

Nikki Heider
• Head of Content Marketing
• Former service line marketing manager
WHO IS WELLTOK?

WHO ARE WE?
Data-driven, enterprise SaaS company offering a sponsor-branded consumer activation platform

WHAT DO WE DO?
Enable sponsors (clients) to activate consumers by targeting and connecting them with personalized health resources

WHO DO WE SERVE?

• Health Plans
• Employers
• Providers
• Public & Community
• Pharmacy
• Health Services

WHAT’S THE VALUE?
• Power growth and retention initiatives
• Improve healthcare value
• Streamline the consumer experience
TEA LEAVES HEALTH IS NOW WELLTOK
MARKET DYNAMICS

Why should there be a focus on consumerism?

Competitive Marketplace

Increased Pressure

Consumer Expectations
WE GET IT: YOU’RE FACING A MULTITUDE OF CHALLENGES
YOU’RE BEING ASKED TO DO THINGS DIFFERENTLY

- Attract and retain more patients
- Generate revenue through strategic, enterprise-wide growth
- Maximize the long-term value of a patient
- Keep (and grow) in-network referrals
- Amplify and compliment your internally developed patient resources
- Manage risk to support value-based reimbursement models

Create a highly-unique patient experience that builds long-term relationships
WHAT DO PATIENTS WANT FROM YOU?
WE ASKED, PATIENTS TOLD US

• What type of health and wellbeing support do they need from you?
• What will increase loyalty to you?
• How important is personalization?
Which of the following would you most likely turn to for holistic health & wellbeing support, not clinical care?

- My healthcare provider (physician office, health system, hospital): 46%
- My health plan/insurer: 21%
- My pharmacy (e.g., CVS): 17%
- The local health department: 10%
- My employer: 5%
- A pharmaceutical company (e.g., Pfizer): 5%
- My preferred grocer (e.g., Publix, Wal-Mart): 5%

37% said none of these
PATIENTS WANT MORE HOLISTIC HEALTH AND WELLBEING SUPPORT FROM PROVIDERS...

74%

Believe their provider should do more to support their health and wellbeing goals even when they are not sick
AND WILL BE MORE LOYAL FOR IT

84%
of all patients would be more loyal to their provider if their overall wellbeing was more supported out of the clinical setting.
TYPES OF PROGRAMS/RESOURCES PATIENTS WANT FROM PROVIDERS

<table>
<thead>
<tr>
<th>Types of Programs/Resources</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to control or manage an existing health condition (e.g. diabetes, asthma)</td>
<td>96%</td>
</tr>
<tr>
<td>Healthy eating habits</td>
<td>94%</td>
</tr>
<tr>
<td>Appropriate level of physical activity</td>
<td>93%</td>
</tr>
<tr>
<td>Emotional or mental health support</td>
<td>93%</td>
</tr>
<tr>
<td>Adequate sleep</td>
<td>93%</td>
</tr>
<tr>
<td>Manageable stress level</td>
<td>92%</td>
</tr>
<tr>
<td>Positive family relationships</td>
<td>83%</td>
</tr>
<tr>
<td>Advice on how to take care of my spouse and/or children</td>
<td>80%</td>
</tr>
<tr>
<td>Financial health</td>
<td>70%</td>
</tr>
<tr>
<td>Finding a higher purpose</td>
<td>65%</td>
</tr>
<tr>
<td>Advice on how to take care of my elderly parents</td>
<td>59%</td>
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</tbody>
</table>

Q: How important is it for you that your healthcare provider offer programs and resources that support the following? (% who answered very important, important or somewhat important)
POLL

On a scale of 1-5, how well do you think your organization is currently providing holistic health and wellbeing support?

(1 = Poor, 5 = Excellent)
FILL OUT THE EVALUATION AFTER THE WEBINAR TO ACCESS THE FULL SURVEY!
PERSONALIZATION IS AN EXPECTATION
Patients are seeking more personalization.

84%

Believe their provider would serve them better if their health interests, goals and motivations were better known.
PERSONALIZATION IS ALSO KEY TO DRIVING ADHERENCE AND SATISFACTION

61%
Feel discharge orders, pre/post-visit info are generic and not personalized to them

81%
Would be more likely to follow if discharge orders, pre/post-info was personalized to them
KNOW YOUR BUSINESS

GROW YOUR BUSINESS
UNLOCK THE POWER OF DATA-DRIVEN PERSONALIZATION
HEALTHCARE DATA PROVIDES A LIMITED VIEW OF A PATIENT

CONVENTIONAL DATA

ENHANCED BENEFICIARY INFO

MEDICAL RECORD

CLAIMS
HOW TO CREATE A 360 DEGREE VIEW OF YOUR PATIENTS

Combine Both Healthcare and Non-Healthcare Data to Create Individual-Level Insights

CONVENTIONAL DATA
- CLAIMS
- MEDICAL RECORD
- ENHANCED BENEFICIARY INFO

PROPRIETARY CONSUMER DATA
- 275M Individuals; 800 Variables

CONSUMER INTERESTS & MOTIVATIONS
- CONSUMER INTERESTS
- CONSUMER MOTIVATIONS
- CONSUMER FEEDBACK

ACTIVITY COMPLETION

EDUCATION
- TAXES
- VOTING
- DEMOGRAPHICS
- INVESTMENTS
- FAMILY

CONSUMER ACTIONS
- CLAIMS
- MEDICAL RECORD
- ENHANCED BENEFICIARY INFO

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CONSUMER ACTIONS
POLL

Are you using consumer data today?
(1= Yes, 2= No)
DATA FLOW AND INTEGRATION

Data Intake
- EMR / Clinics
- Classes/Outreach Events
- Call Centers
- Wellness Centers
- CMS/Web Reg/HRA
- Omni Channel Campaigns

Point of Entry
- Welltok Database
- Cleanse
- Hygiene
- Dedupe
- Append
- Person Matching Index
- Sort
- Segment
- Display
- MetaData

Welltok Proprietary Process
- Define Audience
- Target
- Connect
- Engage
- Measure

Master Person Index
SO YOU CAN BETTER UNDERSTAND AND TARGET PATIENTS
Analytics Drives You Towards a Highly Personalized Experience

WHO HAS WHAT NEEDS?  
WHO IS IMPACTABLE?  
BY WHAT MEANS?

PERSONALIZED EXPERIENCE
CONSUMER DATA & ADVANCED ANALYTICS CAN TELL YOU MUCH MORE

Individuals living in an area where a large percent of families with kids live below the poverty line are more likely to inappropriately use the ED.

Individuals who live in a more blue-collar area are more likely to be receptive to a Complex Case Management program.

Individuals that regularly vote in interim elections tend to be more adherent to medication and treatment plans.

Individuals who have low IRA amount (lower income) are more likely to be receptive to a Transitions Care Management program.

Individuals who have more equity in their home (lower loan-to-home-value ratio) are more likely to be impacted by an Ambulatory Care Management program.
USE CASE – PERSONAS

Survey sent to x # of individuals in the client’s market from Welltok’s database.

Results are sorted for similarities and grouped by demographics/behaviors.

Clients can label each bucket/group as a unique persona.

Those personas are applied to the client’s database of individuals.

- Cool Parents
- Conservative Thinkers
- Risk Takers
- The Athletes
- Safety First
A DATA-DRIVEN CRM: ACQUIRE, ACTIVATE AND RETAIN HIGH-VALUE PATIENTS

Use CRM to build brand and precisely identify high-value, at risk, cardiovascular disease patients

- **At Risk/Low**
- **At Risk/Moderate**
- **At Risk/High**

Leverage multi-channel campaign encouraging completion of an HRA and informing prospect of an upcoming educational workshop.

Collect contact information.
A DATA-DRIVEN CRM: ACQUIRE, ACTIVATE AND RETAIN HIGH-VALUE PATIENTS

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**Patient attends educational workshop**

- Patient receives appointment reminder
- Patient makes appointment with PCP through the call center
- Patient receives access to additional programming on their Personal Health Itinerary to manage their condition, nutrition & exercise goals
- Referral remains in network due to physician liaison outreach

**PCP confirms diagnosis of hyperlipidemia and refers patient to an in-network Cardiologist**

- Patient receives and completes HRA survey
- Patient makes appointment with PCP through the call center
- Patient receives appointment reminder
GENERATE HIGH VALUE, HIGH FIDELITY TARGET LISTS

MEET JOHN

100% All Consumers in Area

30% Patient/Payer
Current patient, Full Insurance Coverage through BCBS

68% Age Range, Gender, Ethnicity
49, Male, Caucasian

21% Lifestyle
Exercises irregularly, likes to eat out, works behind a desk, subscribes to Big & Tall and has tried multiple weight loss plans

47% Individual Marital Status, Presence of Children
Wife (45), 2 kids (Son, 6 & Daughter, 11)

11% Conditions
Known Smoker, overweight, joint pain, and frequent headaches
RETHINK THE PATIENT JOURNEY: PROVIDE YEAR-ROUND SUPPORT
IT’S NOT ABOUT CLICKS, CALLS & CLASSES
False measures of success
WHO ARE WE?

HOW DO WE DO IT?

WHAT DO WE DO?

Who is Most Receptive?

Who is Most Impactable?

What are the Best Channels?

TODAY’S TECHNOLOGY CAN SCALE TO GET YOU THERE

Integrate Comprehensive Data…

…Using a Machine Learning Platform…

…To Make it Easy for People to Complete Personalized Health Actions

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THANK YOU AND QUESTIONS
providersolutions@welltok.com