



IDC ExpertROI® SPOTLIGHT

Regional Nonprofit Health System Better Serves Its Patients and Keeps More Patients In-Network with Salesforce

Sponsored by: Salesforce

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Overview

The nonprofit health system profiled in this study seeks to enable the hospital, primary care, and specialty physician communities under its umbrella to work together more efficiently and effectively for better and less costly outcomes for its patients. To help meet this goal, the organization operates a Consumer Resource Center, which serves as a contact hub for individuals to call if they need help selecting a physician, want an expert to assess symptoms, or want to ask questions about a specific disease or illness. The Consumer Resource Center also coordinates nurse triage, patient scheduling, and referral management for the entire network – all on a 24 x 7 basis.

To optimize operations for this Consumer Resource Center, the organization deployed Salesforce Service Cloud in September 2014. Its deployment of Salesforce included computer-telephony integration (CTI) to link the phone system into the customer relationship management (CRM) platform. In addition, the organization performs automated extracts of patient data from its electronic health records (EHRs) system that it uploads to Salesforce on a daily or weekly basis and uses a tool to pull data from Salesforce to its EHR, providing a more comprehensive view of patient data, including patient status, medications, lab results, and scheduled appointments with providers.

During an interview, a care coordinator and director of the Consumer Resource Center explained that the organization's use of Salesforce's solutions has greatly improved the ability of the Consumer Resource Center to support the business while making the professionals who work there much more efficient. Since deploying Salesforce, the organization has increased revenue by keeping substantially more patient referrals in-house, providing more efficient nurse triage services, and reducing care coordination costs by better identifying and planning care for at-risk patients.

Business Value Highlights

Organization: Regional nonprofit health system

Location: United States

Network: Serves hundreds of thousands of patients across 15+ care facilities; employs 21,000 healthcare professionals

Challenge: Improve patient engagement and care through enablement of a Consumer Resource Center, with better visibility, processes, and real-time information

Solution: Salesforce

Five-year cumulative benefits:

- \$14.0 million in discounted business benefits
- ROI of 445%
- Payback in 3.1 months

Other benefits:

- 57% more provider referrals staying in-network
- 90% of patient-generated find-a-provider referrals staying in-network
- 460% more patients supported by the Consumer Resource Center
- 38% reduction in time per call in the Consumer Resource Center

Based on interviews with the director, IDC projects that this health system will achieve staff productivity gains, reduced costs, and increased revenue worth an average of \$3.91 million per year when projected over five years (refer to Figure 1), resulting in a five-year return on investment (ROI) of 445% and a payback period of 3.1 months.

Implementation

The health system's Consumer Resource Center evolved from its long-standing call center operations, which the healthcare organization used to triage callers' symptoms and direct patients to the most appropriate place of care. Services also included emergency department transfer coordination, post-discharge follow-up and class registration. The director noted that the services provided by the call center were well regarded.

However, by 2013, the organization realized that its systems and applications for nurse triage, care coordination, and referral management were becoming outdated. In addition, there was no easy path for extending the services to 24 x 7 operations, which the organization believed was a necessary step to better meet consumers' health needs. Operations were limited by a phone system that was not linked to the documentation system and provided no information on the caller prior to answering the call, making the experience more impersonal. Further, the director noted that the healthcare organization's efforts to adjust to the Affordable Care Act and outcomes-based reimbursements called for a more comprehensive approach to patient-centric care.

In November 2013, key stakeholders in the organization's network met to reimagine patient and provider engagement. They decided to invest in a Consumer Resource Center that would connect their community to improve access to care, reduce costs, and manage health in new and innovative ways.

A five-year strategic plan was developed and approved. The director said that after evaluating a number of IT platforms to support the Consumer Resource Center, the organization chose Salesforce Service Cloud with CTI to provide a link to the phone system.

"We wanted a solution that we could control and customize because we recognized it would be an evolutionary process," said the director. "We didn't want to be handicapped with an out-of-the-box approach where we would have to wait for upgrades and enhancements. Salesforce was the only solution that met all our needs."

Implementation of the Salesforce healthcare platform began in June 2014, and the contact center solution went live in September 2014. A month later, ambulatory care coordination was added, followed by referral management in December 2014. The contact center expanded to 24 x 7 operations in March 2015, with Bundled Payments for Care Improvement navigation added in May 2015. Planned additions include provider relations, oncology nurse navigation, and ADT integration.

Benefits

The director explained that use of Salesforce has enabled his organization to better serve its patients, develop one-to-one relationships, and improve its ability to keep patients and potential patients within its network of healthcare providers. In particular, he cited the capability with Salesforce of obtaining integrated data from the organization's multiple databases

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as providing a more complete view of patient care. The cloud-based Salesforce solution has also made it easier for the Consumer Resource Center's professionals to handle nurse triage, manage referrals, schedule primary care visits, and coordinate ambulatory care more effectively and to engage with consumers across their caregiver networks. These efficiencies have enabled the organization to increase revenue by keeping more patients in-network, reduce costs associated with providing care, and improve the productivity of its staff in the Consumer Resource Center.

The director cited a number of ways in which Salesforce has positively impacted his organization's ability to interact with and support patients: "We are thrilled with Salesforce. It has allowed us to move our navigators onto a single platform and standardize their workflows and increase collaboration with ambulatory, acute, and post-acute care coordinators. We can now track patient outcomes in real time." He also cited increased visibility as a benefit: "With Salesforce, we have a complete view of the patients; we can see the care teams and relationships between patients and providers and build a timeline to see a consistent history of interactions with patients."

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According to the director, with Salesforce, the health system has increased its revenue by keeping more patient referrals in-network. Prior to deploying Salesforce, provider information was maintained in 17 databases, making it challenging for employees to get a complete view of the patients and access in a timely fashion all the information needed to determine which doctors were in-network. Salesforce's search engine now allows the professionals to filter by specialty and find the provider within the network closest to the patient. The system also identifies service line or geographic gaps where there is no in-network specialist so that such specialists can be recruited. As a result, the organization is keeping more patients in-network and earning more revenue by making its referral management and find-a-provider efforts more efficient and effective.

Meanwhile, the director said that Salesforce has also helped his organization earn more revenue by making its nurse triage operations more targeted and effective. In addition, the director noted that the organization is achieving cost savings associated with coordinating ambulatory care by better identifying at-risk patients, creating better patient plan and care models, and limiting after-hours support costs by preventing readmissions when nurse triage can lead to higher-quality and more cost-effective care for the patients.

Further, professionals supporting the Consumer Resource Center are more productive because the Salesforce platform is integrated with the phone system. Previously, people answering calls needed to ask questions to identify the callers and the reason for their call and then find the callers in the system before beginning to address the reason for their call, such as scheduling an appointment. With the Salesforce platform, information on all patients who have seen a provider in the network within the past year is extracted from the EHR system and uploaded to Salesforce, linking them to their primary care office. When the phone rings, the system queries Salesforce about the caller based on the phone number, identifies the clinic or facility used previously, and supplies information on the providers and their houses and the type of insurance taken to the employee handling the call – all before the call is answered. If a provider is on vacation or unavailable for a particular period, then the system provides an alert. This has enabled the Consumer Resource Center to handle proportionately more calls per staff member, reduce the average time per call, and reduce the call abandonment rate.

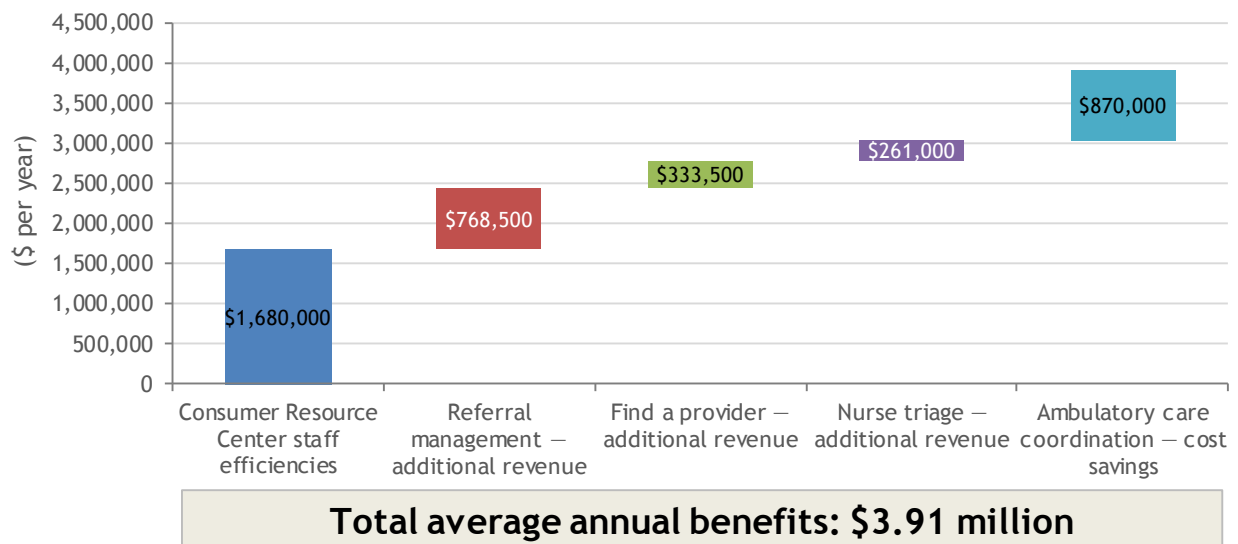
The director also noted that the Salesforce platform is saving his organization time and money because it obviates the need to buy additional applications. According to the director, "Salesforce is so flexible we can usually build whatever application our team wants without having to buy it. In 13 months, we have added nine applications within Salesforce for nine different groups. That's nine applications we don't have to buy and IT doesn't have to manage."

Quantifying the Benefits

From its interview with the director, IDC has quantified the staff productivity gains, cost savings, and additional revenue that it projects the health system will realize from deploying the Salesforce solution. IDC puts the value of these benefits at an average of \$3.91 million per year when projected over five years (see Figure 1).

FIGURE 1

Average Annual Benefits



Source: IDC, 2016

Staff Productivity Benefits

Since deploying the Consumer Resource Center, the health system has increased the number of professionals supporting its operations from 11 employees to 55 employees. These professionals handle an average of 14,000 calls a month with patients, which is 460% higher than the previous volume of 2,500 calls a month. Since beginning to use Salesforce, the call length has fallen from an average of nine to six minutes, and the time to answer a call has fallen from an average of 45 seconds to 19 seconds. As a result, the professionals supporting the Consumer Resource Center's operations have become more productive and are improving overall patient experience without a commensurate increase in staff size. IDC projects that these productivity gains will amount to a benefit worth an average of almost \$1.7 million a year over five years.

In addition to these staff productivity gains, patient satisfaction has doubled with the Salesforce platform in place. The director cited improvements in a number of areas such as connecting a patient with a clinic, minimizing call abandonment rates, and faster scheduling of appointments. As the director said, "Patients appreciate getting through the call quicker without having to answer multiple questions whose answers we should know. Also, since the service is available 24 x 7, patients can get through any time to schedule an appointment or be triaged to the appropriate care facility."

Business Productivity Gains

The health system is also realizing substantial value with Salesforce by capturing more revenue by keeping patients in-network, from both provider-generated referrals and the patient-generated find-a-provider service. The director explained the benefit as follows: "Before, a care provider would usually tell a patient to see a specialist and report back in three months. There was generally not enough follow-through. With Salesforce, we have put a process in place that is very active, so the provider doesn't have to choose a specialist unless they have someone specific in mind. We can identify the appropriate specialist in the network and do the follow-up to make sure the patient keeps the appointment. We can also do quality control afterward to see if the patient was satisfied with the specialist and to keep tabs on any secondary referrals or other required action."

With the find-a-provider service, the professionals fielding calls can more easily find the appropriate care provider from within the network. "We get many referrals from emergency departments to help with nurse triage for patient calls they are not able to triage telephonically," the director said. "We can direct the caller to the appropriate emergency department or to an urgent care facility or specialist within the network if the patient condition warrants." For the organization, this has had a clearly positive impact on its revenue. The director said that before the Salesforce deployment, fewer than half of the referrals were staying in-network, and this rate has now risen to 84%. Meanwhile, for the find-a-provider service, the organization is now keeping more than 90% of referrals in-network.

IDC projects that over five years, the organization will capture net income worth \$768,500 per year from keeping more provider referrals in-network and \$333,500 per year from better leveraging the find-a-provider service.

In addition, the director reported that his organization is achieving more revenue and reducing costs by better utilizing nurse triage services since deploying Salesforce. IDC projects that the organization will achieve net income worth an average of \$261,000 per year over five years by better serving patients with nurse triage efforts and will achieve cost savings worth an average of \$870,000 per year over five years by limiting unnecessary patient readmissions and reducing costs associated with after-hours support.

Return on Investment

IDC calculates that this health system will achieve discounted benefits worth \$14.0 million over five years compared with a discounted investment of \$2.6 million through its use of Salesforce's solutions for the healthcare industry. IDC projects that as a result, the organization will earn a five-year ROI of 445% on its investment in Salesforce and will break even on its investment in just over three months (see Table 1).

TABLE 1

Five-Year ROI Analysis

Benefit (discounted)	\$14.0 million
Investment (discounted)	\$2.6 million
Net present value (NPV)	\$11.4 million
Return on investment (ROI)	445%
Payback period	3.1 months
Discount rate	12%

Source: IDC, 2016

IDC conducted several interviews with the director to discuss how the health system is using Salesforce's solutions for the healthcare industry to support its operations and Consumer Resource Center. Based on information taken from these interviews, IDC has quantified the benefits and investment it associates with the healthcare organization's use of Salesforce and created an ROI analysis from the results.

IDC calculates the ROI and payback period in a three-step process:

1. Measure the financial benefits directly resulting from the solution, including decreased IT infrastructure costs, increased IT staff and user productivity, revenue enhancements, and operations cost reductions since deployment.
2. Ascertain the total investment.
3. Project the investment and benefit over five years and calculate the ROI and payback period. The ROI is the five-year net present value (NPV) divided by the investment. Payback period (expressed in months) is the time required to pay back the initial investment and establish a positive cash flow. To account for the time value of money, IDC bases the ROI and payback period calculations on a 12% discounted cash flow.

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