Welcome to the Age of the
Patient

salesforce

Learn how CRM solutions can guide providers in this new era of healthcare.

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Welcome to the Age of the Patient

Improving patient health is the calling that brings most healthcare professionals to the industry. But at the organizational level, patient care can sometimes be at odds with the business of running a healthcare system. Traditional payment systems that reward for volume can skew a provider's focus toward short-term health goals, and also increase the cost of care for patients and insurers. However, the shift toward value-based reimbursement aims to align payments with a more holistic approach to better outcomes.

This new paradigm, combined with advances in customer relationship management (CRM) technology, creates an unprecedented opportunity to transform the patient experience. In this new era, which we call the "Age of the Patient," caregivers will be able to guide each patient on his or her own connected journey. In this e-book, you'll see how CRM solutions can help you thrive in the Age of the Patient.

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Chapter One
The Landscape

We Live in a Smarter World

To understand the Age of the Patient, we must first understand how technology has shaped a smarter world. Technology evolved from mainframes and terminal computers to a world today where everything is connected. These changes create an unprecedented network of interactions such that we've all adopted social, mobile, and connected devices as part of everyday life. In fact, 61% of consumers say that technology is redefining their behavior.[*]

Customer relationship management has also evolved: CRM was once seen as a point solution allowing sales teams to automate customer interaction workflows to enable more personalized relationships. Now it is used across sales, service, marketing, development, and more – unlocking a unified view of the customer across business units while fostering collaboration. This level of intelligence means companies are able to deliver greater value to their customers.

AI

IoT

Mobile

Social

Cloud

Client/ Server

Mainframe/ Terminal

pepper

"Hey Siri, take me home in an uberX"
Uber can get you an uberX in 3 minutes. Do you want to request it?

UBER

Get a Ride

uberX
5:39PM $8-10

70°F

100K mainframes

10M PCs

6B mobile phones

75B smart things

[1] Salesforce state of connected customer report, 2016.

Technology Drives Consumer Expectations in Every Industry

Across every industry, companies are completely reinventing customer engagement. In businesses of all kinds – including taxi services, personal banking, bookstores, big retail, and more – new services and delivery models are reshaping customer expectations.

Consumers today expect high levels of service, flexibility, and access, and they hold companies accountable to deliver in every interaction.

The best experience we get anywhere becomes the experience we expect everywhere – meaning the bar for the patient experience is rising. Gone are the days of sitting in a waiting room for hours; we want great care at our convenience.

Connected

Social

Personalized

Intelligent

Care Today Is Complicated

Pharmaceuticals

Patient

Caregiver

Nurse

Primary Care Physician

Pharmacist

Insurer

Medical Device

While healthcare organizations strive to serve patients well, the patient experience remains complicated for reasons that can seem hard to solve. Consumers want convenience and ease, yet every patient is different, so a "one size fits all" approach just isn't feasible.

The increasing specialization of care means that patients have to navigate multiple organizations to get the services they need. The barriers that exist between organizations makes navigating this process a challenge for patients and providers alike.

Healthcare organizations aspire to make that patient journey easier, but they lack the right tools to enable collaboration and information sharing. Fortunately, this is exactly the kind of problem CRM technology can solve.

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Chapter Two

Reimagine the Patient Experience

Connected Patient Journeys

Healthcare organizations have an opportunity to create connected patient journeys that can guide patient interactions while maximizing productivity and efficiency.

This journey starts with the very first interaction when **attracting** prospective patients. From there, providers must build trust with every point of **service,** from rescheduling appointments to managing care. And finally, providers must focus on keeping patients on the path to better outcomes with ongoing **engagement** and support.

With CRM, healthcare organizations have a unified view of the patient across every touchpoint and can develop deeper relationships, trust, and loyalty.

Serve

Attract

Engage

Patient Journey

Attract

As patients have more choices today than ever before, leading organizations know they need to get smarter about how they attract patients. For many providers, the focus is on optimizing physician-led referrals. With dashboards built into Salesforce, you can track referring accounts, identify the ones that are poised for growth, and tell your liaisons where to focus their time and energy. You can also maximize liaison productivity while they're on the go by delivering account information, notes, and dashboards to their devices. They'll spend less time filling out reports and more time meeting with physicians.

At the same time, providers relying on direct advertising are feeling increasing pressure to show a return on investment. Salesforce lets you track prospects from awareness, to consideration, to finally becoming a patient. No matter how prospects come in – via phone, digital ad, or web form – you can track them all in one console. That single view makes it easy to follow up with prospects using email or text campaigns that can nurture their interest and guide them to the right services.

Attract

Serve

Coordinating care becomes increasingly important to delivering on the vision of patient centricity. Sadly, many families experience the opposite: a lack of information about prerequisites, lost referrals or directions, and missing data in medical records. Salesforce gives care managers a complete view of each patient at their fingertips. By understanding the patient's complete story, caregivers can provide contextual support and work as a team to synchronize outreach and follow up with patients and families.

Serving patients isn't limited to care – to maintain trust you need to address every need whether it is as simple as where to park or how to schedule an appointment. CRM simplifies the patient experience by integrating existing systems into a single console giving agents a 360-degree view of each patient and eliminating endless searching. Agents can give support on any channel, including phone, chat, and even text. And with predictive intelligence built into CRM, each case becomes an opportunity to deliver proactive care by helping your agents recommend services, like wellness programs, that improve patient health and reduce costs. Built-in analytics also helps you keep track of key metrics to prevent bottlenecks and establish best practices.

Serve

Engage

In order to effectively engage with patients, providers must deliver a simplified, personalized, and connected experience before, during, and after care episodes. For instance, sending appointment reminders through text messages or email and communicating what pre-work needs to happen beforehand ensures that everyone is set up for success. You can use the same channels to better educate patients about their condition so they will be more likely to adhere to medication and care plans. Mobile apps can give patients easier access to care plans and resources, and even enable direct communications and telehealth appointments with their care team.

Shifting to value-based care will require increased engagement not only with patients but amongst care teams. Improving collaboration across siloed teams can increase the efficiency of care delivery. When you integrate data from legacy systems and email into a secure CRM system, your care teams can better collaborate and share knowledge in searchable, social formats. Cloud-based technology also allows teams to communicate in real time on any device, liberating care managers from their desks so they can spend more time with patients.
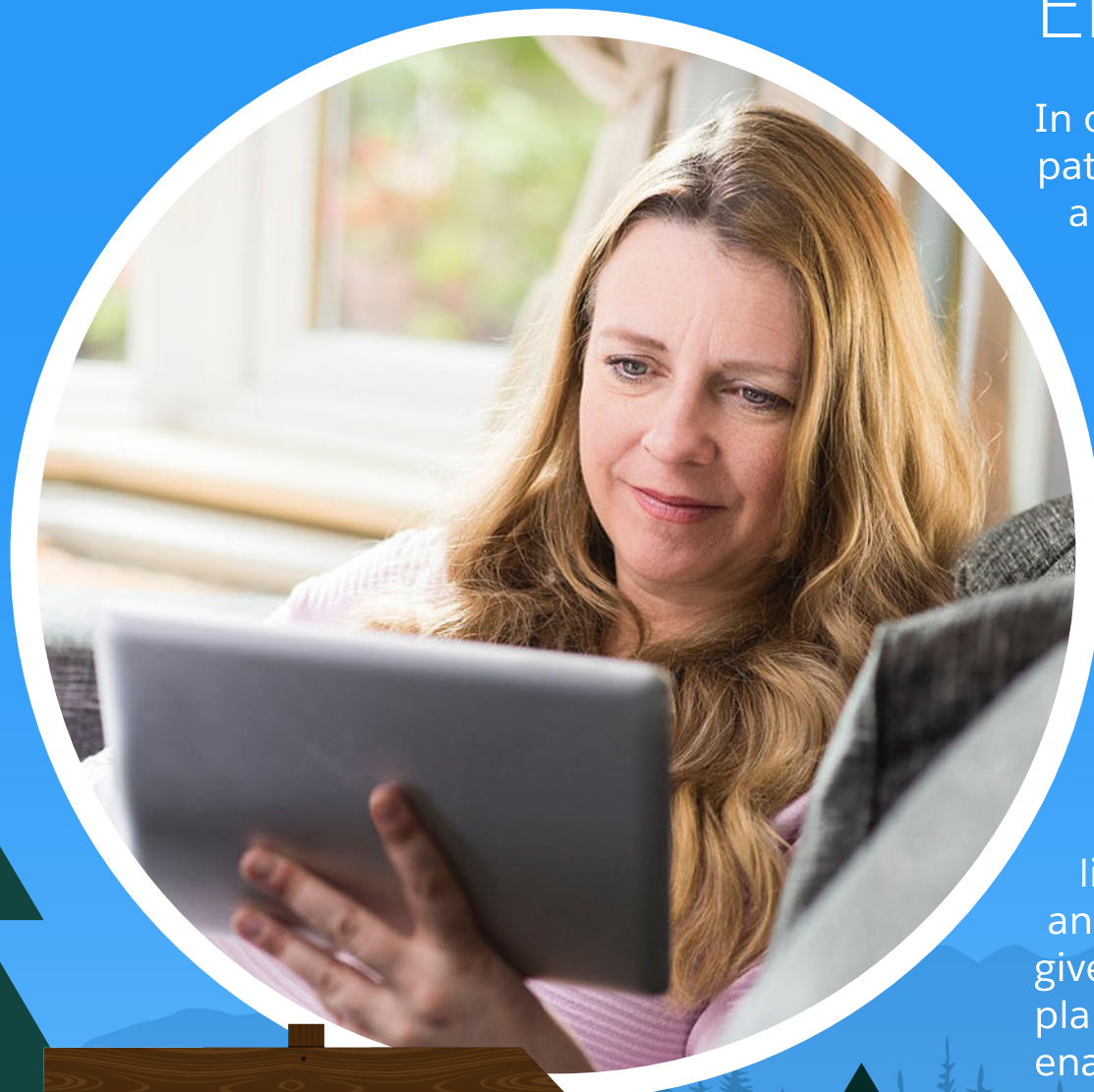
Engage

Customer Spotlight: CareCentrix

CareCentrix is focused on helping patients age and heal where they want to be – at home. This approach helps reduce costs and improve the patient experience. The goal is to keep patients safe as they heal at home – and help them avoid readmission. CareCentrix leverages technology in a way that connects patients and providers seamlessly, reduces risks when patients come home from the hospital, as well as engages patients with their communities and the services they need, creating a connected patient journey

Its advice for the industry?

- *Invest in a platform that facilitates technology use as a safety net – that is, to avoid gaps in care*
- *Standardize care protocols across the organization*
- *Personalize the recommendations for the patient's needs*
- *Innovate to keep the ecosystem connected – including patients, caregivers, families, and partners*

The result? CareCentrix looked across cost of care, patient outcomes, and readmissions, and found:

- Patient satisfaction via recommendations went to 95%
- Readmissions rates reduced by 38%

95% of patients would recommend the program

38% reduction in readmission rates

Chapter Three

How to Invest in a Patient-Centered Future

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32% of providers are looking to invest in **CRM**
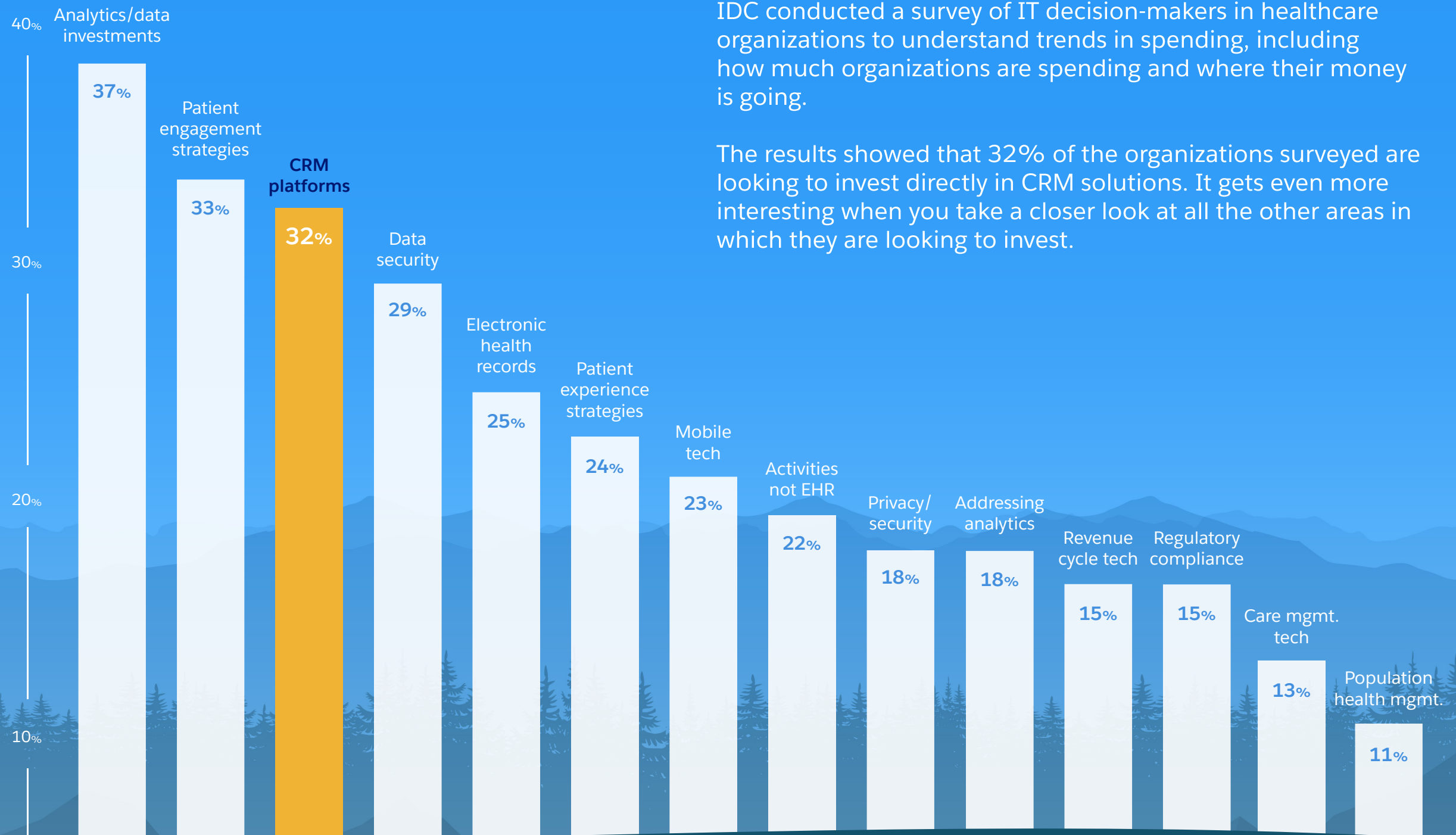
IDC conducted a survey of IT decision-makers in healthcare organizations to understand trends in spending, including how much organizations are spending and where their money is going.

The results showed that 32% of the organizations surveyed are looking to invest directly in CRM solutions. It gets even more interesting when you take a closer look at all the other areas in which they are looking to invest.

40%

Analytics/data investments
37%

Patient engagement strategies
33%

CRM platforms
32%

30%

Data security
29%

Electronic health records
25%

Patient experience strategies
24%

20%

Mobile tech
23%

Activities not EHR
22%

Privacy/ security
18%

Addressing analytics
18%

Revenue cycle tech
15%

Regulatory compliance
15%

Care mgmt. tech
13%

10%

Population health mgmt.
11%

Areas related to **CRM**

The three spending areas highlighted here in purple – analytics, patient engagement, and patient experience – are use cases that a CRM system like Salesforce can also solve. Yet many organizations don't realize this because the core capabilities of a CRM system have changed significantly over the past decade.

Today's CRM is a comprehensive platform for managing analytics, delivering patient engagement strategies, and creating meaningful patient experiences through a connected service experience.

Chart values:

Category	Percent
Analytics/data investments	37%
Patient engagement strategies	33%
CRM platforms	32%
Data security	29%
Electronic health records	25%
Patient experience strategies	24%
Mobile tech	23%
Activities not EHR	22%
Privacy/security	18%
Addressing analytics	18%
Revenue cycle tech	15%
Regulatory compliance	15%
Care mgmt. tech	13%
Population health mgmt.	11%

Other areas of investment involving **patient touchpoints**

Look one level deeper at the other spending priorities for healthcare IT departments, highlighted here in green, and you'll find additional functions that CRM can support to deliver even more value.

CRM can essentially be your go-to system for any activity not taking place in the electronic health record (EHR.) This includes patient acquisition, network referrals, case management, home health, care team collaboration, patient services, and much more.

Analytics/data investments — 37%
Patient engagement strategies — 33%
CRM platforms — 32%
Data security — 29%
Electronic health records — 25%
Patient experience strategies — 24%
Mobile tech — 23%
Activities not EHR — 22%
Privacy/security — 18%
Addressing analytics — 18%
Revenue cycle tech — 15%
Regulatory compliance — 15%
Care mgmt. tech — 13%
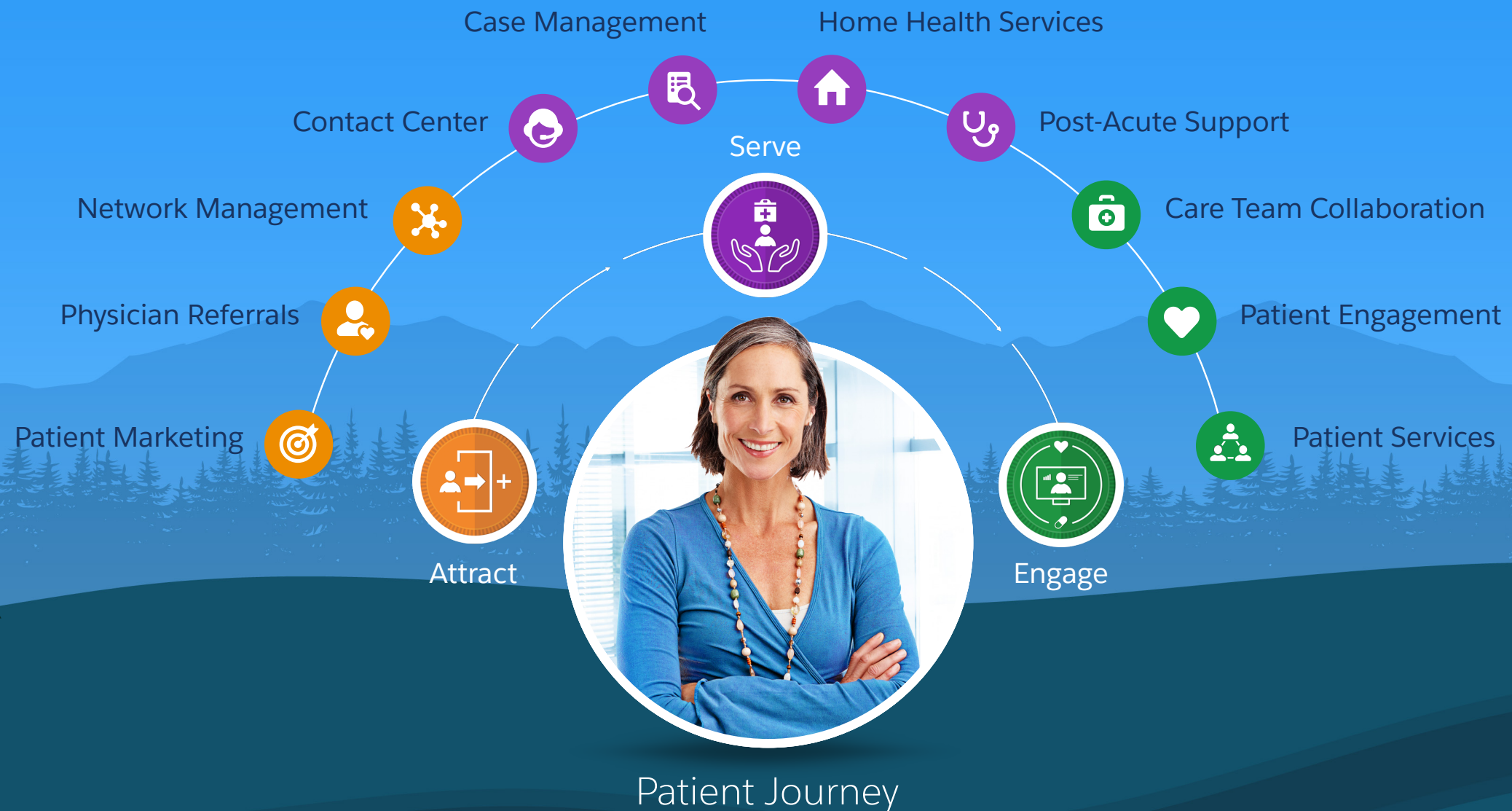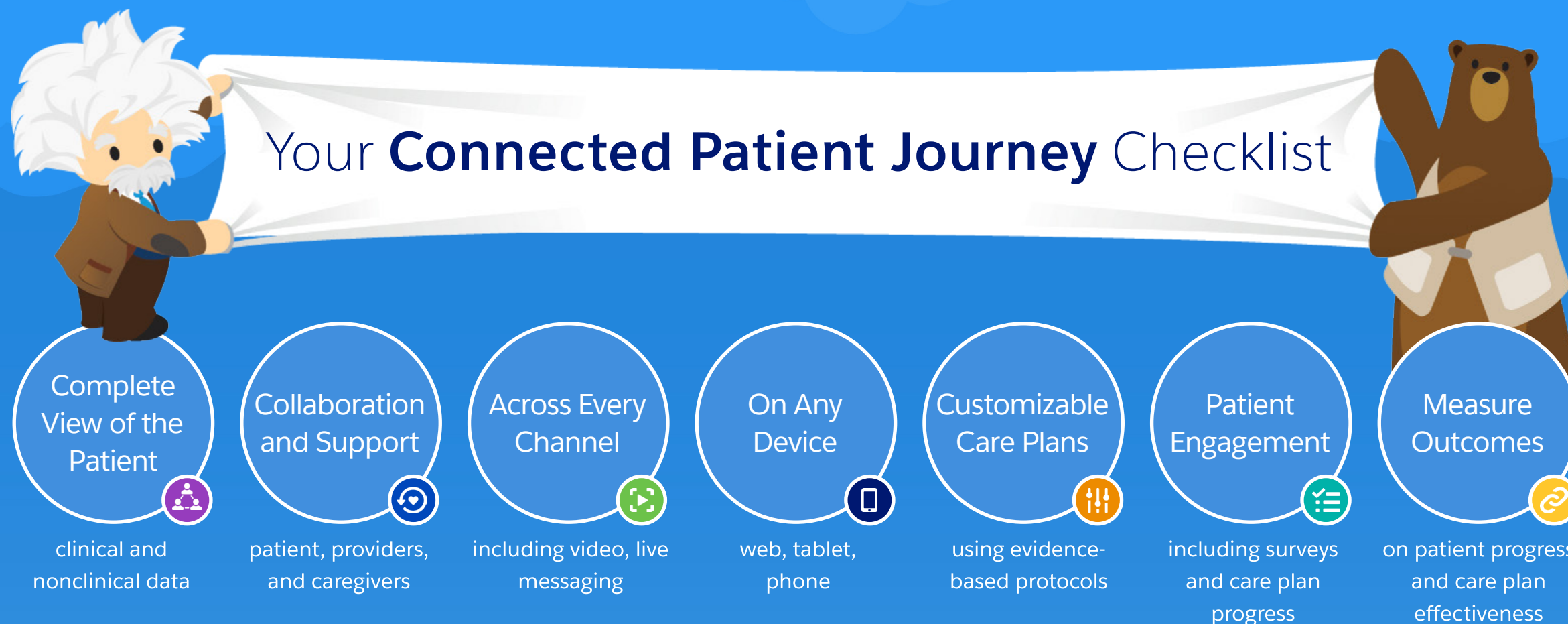Population health mgmt. — 11%

Future-Proof Yourself with a Platform That Can Scale with Your Needs

Instead of investing in a plethora of systems with limited interoperability, choosing a single CRM platform with the right functionality is a cost-responsible way to address many of your most pressing IT needs.

The benefit of the Salesforce Platform is that it lets providers add on more functionality as their needs grow while still maintaining a unified view of the patient across every touchpoint. The flexibility of the platform even allows business users to build their own apps with clicks, not code, freeing up IT resources for other needs. And with new feature releases three times a year, Salesforce customers benefit from continuous innovation.

Case Management

Home Health Services

Contact Center

Serve

Post-Acute Support

Network Management

Care Team Collaboration

Physician Referrals

Patient Engagement

Patient Marketing

Patient Services

Attract

Engage

Patient Journey

Your **Connected Patient Journey** Checklist

Complete View of the Patient
clinical and nonclinical data

Collaboration and Support
patient, providers, and caregivers

Across Every Channel
including video, live messaging

On Any Device
web, tablet, phone

Customizable Care Plans
using evidence-based protocols

Patient Engagement
including surveys and care plan progress

Measure Outcomes
on patient progress and care plan effectiveness

This checklist outlines your building blocks to deliver a connected patient journey.

The first step is seeing a complete view of the patient. CRM can merge clinical data from the EHR with nonclinical data such as patient preferences and insights from the care team.

Once you have unified patient data, patients, providers, and caregivers can access and share the right information at the right time. That collaboration and support is extended across every channel and device for a cohesive experience.

Now you can build on that foundation with intelligence. For instance, customizable care plans allow organizations to achieve both personalization and scale. You can also add new engagement layers, receiving patient data through surveys and feedback on personal care plans.

With all of these elements in place, you can have greater confidence in your data and track your efforts to deliver better patient outcomes.

Ready to Reimagine the Future of Patient Relationships?

It's never been a more exciting time to be in healthcare. While the pace of change may be unprecedented and somewhat daunting, it also provides an opportunity to reimagine the patient journey to thrive in the era of value-based care. From attracting patients, to service, to ongoing engagement, CRM systems can help you deliver better outcomes for your patients while improving organizational productivity and efficiency.

Want to learn more?

Watch the Health Cloud Demo

Schedule a meeting