



How Next-Gen CRM is Helping Drive Forward Deeper Engagement and Increased Return on Investment

Michael Shepherd, CMO, Franciscan Health

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Introductions



Mike Shepherd
Chief Marketing Officer
Franciscan Health



Gary Druckenmiller, Jr.
General Manager, CRM
Innovaccer



Agenda

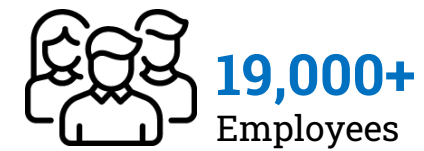
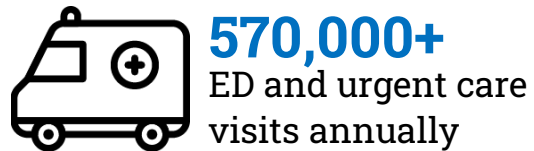
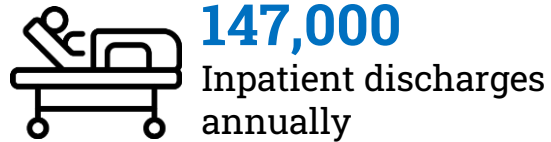


- **Franciscan's Patient Engagement Challenge**
 - Operating, Technology & Data Silos
- **The "Solution Pathway"**
 - Democratization of Data
 - Internal Governance & Champion Building
 - Tight Program Planning
- **So....."What's Next?"**
 - Challenges & Roadblocks
 - Planned KPIs & Building Blocks

Franciscan Health Overview

The Franciscan Health ministry began in Lafayette, Indiana in 1875. Today, Franciscan Health is one of the largest Catholic healthcare systems in the Midwest with several nationally recognized centers of healthcare excellence.

www.FranciscanHealth.org



Innovaccer Overview

About us



headquarters in San Francisco

2014

started changing healthcare

\$3.2B

market capitalization

1,500+

employees across the globe

Select customers

one medical



Partners



55+

health systems and plans connected for Interoperability

54M+

unified patient records

96,000+

providers

\$1B+

cost savings



KLAS 93.2

leader for Data Platform



#1 client rated

Data Activation Platform and Healthcare Data Integration Systems



Scored 97

by SecurityScorecard and Top of KLAS for cyber security



Society for Health Care Strategy & Market Development™



What was the patient engagement challenge at Franciscan Health?



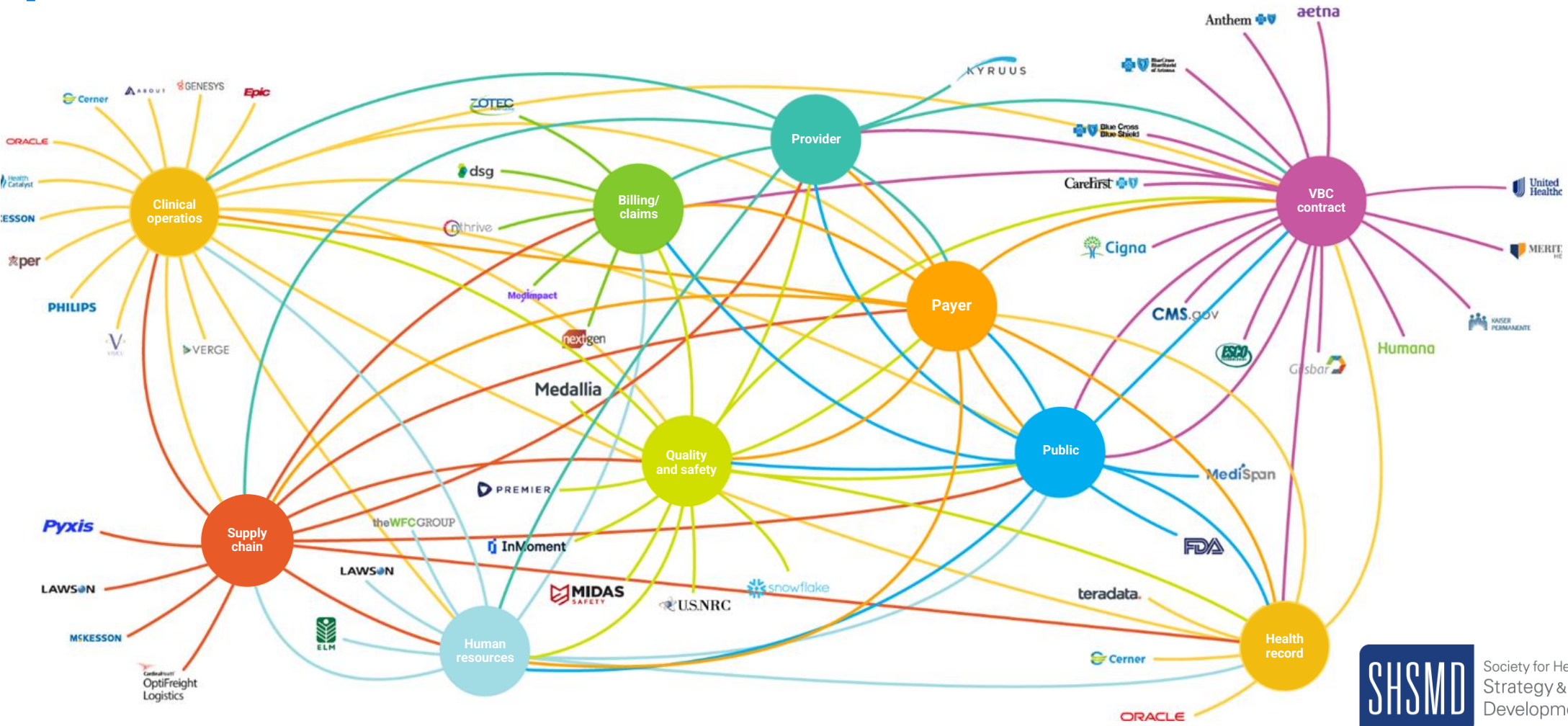
Franciscan Health's Person-Centric Journey

Enterprise-wide Person-Centric Journey began in 2022 to deliver better experiences and outcomes.



- A focus on person-centric means supporting multiple experiences, often taking place at once.
- Each experience is unique and demands solutions that are relevant and personalized.
- Relevant information is a determinant of health – *a marketing and CRM opportunity.*

The “typical” health system IT infrastructure makes it impossible to harness the true value of data



Challenge: Data Silos

Disconnected data across systems made growth, retention and experience strategies difficult to achieve.



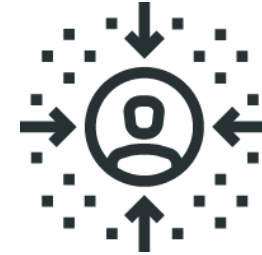
- Existing CRM marketing, sales and service clouds/data disconnected.
- Multiple records for same patients and prospects.



- Marketing has limited access to EPIC EMR clinical and financial data within CRM.
- Marketing ROI difficult to demonstrate.



- Marketing data fragmented with various marketing agencies.
- Data siloed from clinical and financial data.
- ROI impacted.



- Data silos make it impossible to provide a single view of patients and consumers.
- CRM Next-best-action and retention efforts limited.



- ACO, population health, and marketing teams manage patient communications using disconnected data and insights and applications.



Challenge: Operational Silos

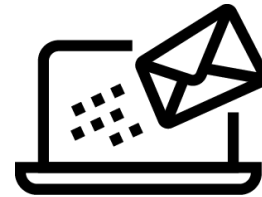
Strategic and operational planning silos made it difficult to scale experiences and best practices.



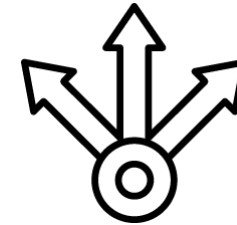
- Engagement Center built on CRM platform; however, **90% of agent work still handled directly within the EPIC EMR.**
- “Chart-Diving” the EMR created inefficiencies and doubts about the value of CRM.



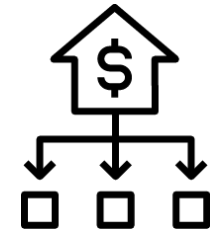
- Significant variation in how physician schedules are built within EPIC EMR.
- Provider-level control over templates limited appointment access (blocks, private slots, holds, etc.)



- Lack of clinical data led to marketing CRM operations focused on new patient acquisition.
- CRM patient retention and loyalty initiatives very limited – **the opposite of how CRM typically starts.**

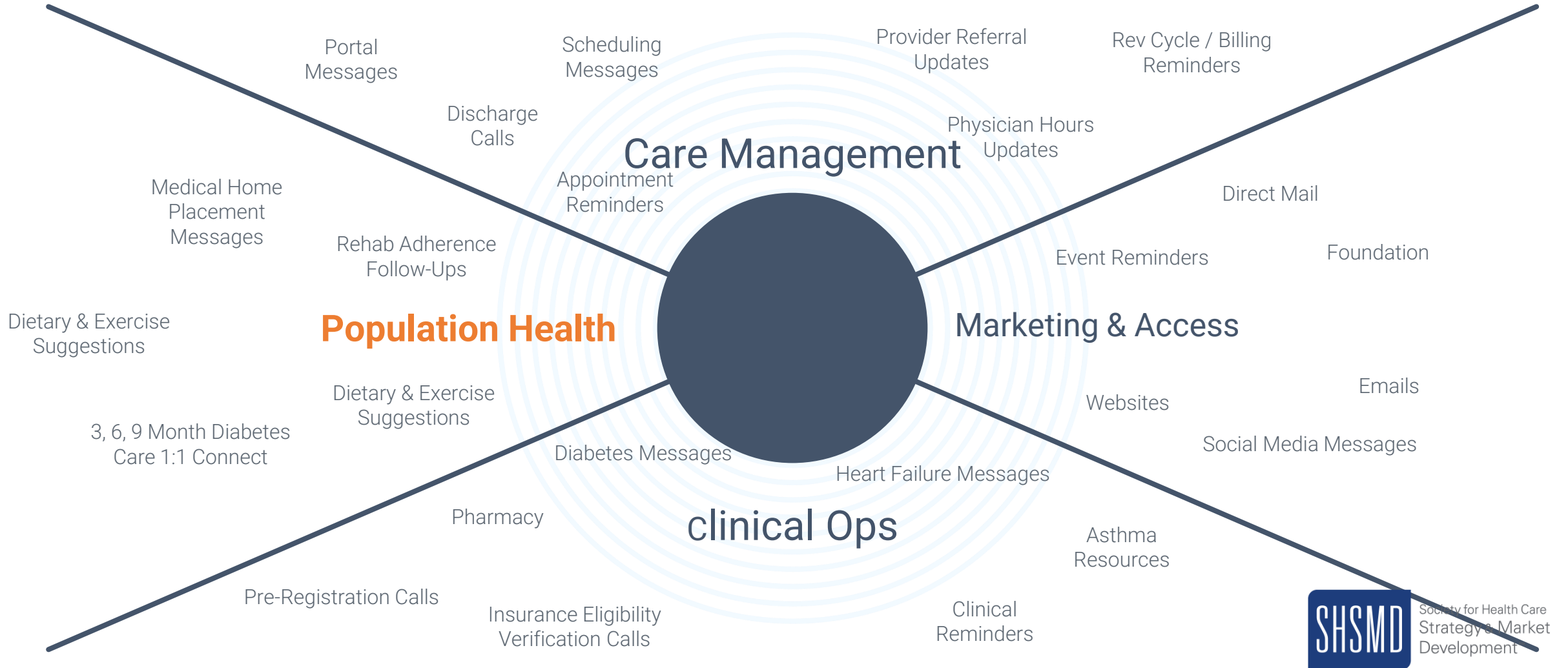


- Multiple common, but unaligned, goals between marketing and population health (e.g., screenings, Medicare wellness visits).
- Lack of integrated strategic planning process creates poor experiences.



- Marketing process metrics strongly in place (efficiency).
- Marketing ROI difficult to demonstrate (effectiveness).
- Lack of finance partnership led to dependency on agencies for ROI measurement.

Lots of patient messages per experience



Challenge: Technology Silos

Marketing CRM not integrated with person-centric technology strategy.



- CIO, IT and clinical operations teams not fully invested in CRM strategy.
- Transactional relationship with IT (e.g., budget, tech support) needed to evolve to an interdependent partnership.



- Significant investment in marketing CRM technology with limited utilization of capability and value realization.
- Rising cost of marketing technology, especially CRM, became unsustainable.



- Governance model led to variation in technology selection, value realization, and utilization.
- Multiple email marketing, event management, etc., solutions utilized.
- Population health and ACO use different tools (e.g., EPIC, EMMI).



How are we solving the patient
engagement challenges?





The greatest **danger** in times of turbulence is not the turbulence; it is to **act with yesterday's logic.**

- Peter Drucker

Franciscan Health's CRM Journey At-A-Glance

“Start by doing what's **necessary**; then do what's **possible**; and suddenly you are doing the **impossible**.”

- St Francis of Assisi



Guiding Principles: Achieving the impossible

Create an experience that is connected; trustworthy; and delivers meaningful and measurable impact.

- 1 Forged partnership with C-suite executives from marketing, IT and clinical operations to set strategy.
- 2 Set priority to establish a common data platform as the foundation for engagement strategies.
- 3 Reimagine population health, marketing and engagement center applications on the common data platform.
- 4 Transform and redefine the role of marketing.
- 5 Build an interdependent relationship between marketing and population health to accelerate value.
- 6 Leverage the power of unified data to execute enterprise-wide person-centric strategies (Health 1:1 journey)



Solution: Enterprise-wide CRM

Connected and aggregated data available and useful across the entire healthcare journey.



Single Consumer- and Patient-360 View

- EPIC clinical data
- Claims data
- Population health and value-based-care data
- Financial data
- Marketing data (e.g., campaigns, events, health assessments)
- Marketing agency data
- Experian consumer data



Centralized Marketing Operations Solution

- Email marketing
- SMS and voice marketing
- Registry (list) builder with access to full data platform
- Journey building
- Campaign management
- Platform integration with agency operations
- Native and custom health risk assessments



Elevated Engagement Center Experience

- Agent access to full scope of platform data
- Reduced need to “chart dive” in EPIC
- Next-best-action recommendations
- Easy collaboration with care management teams
- Marketing acquisition, and retention campaign support

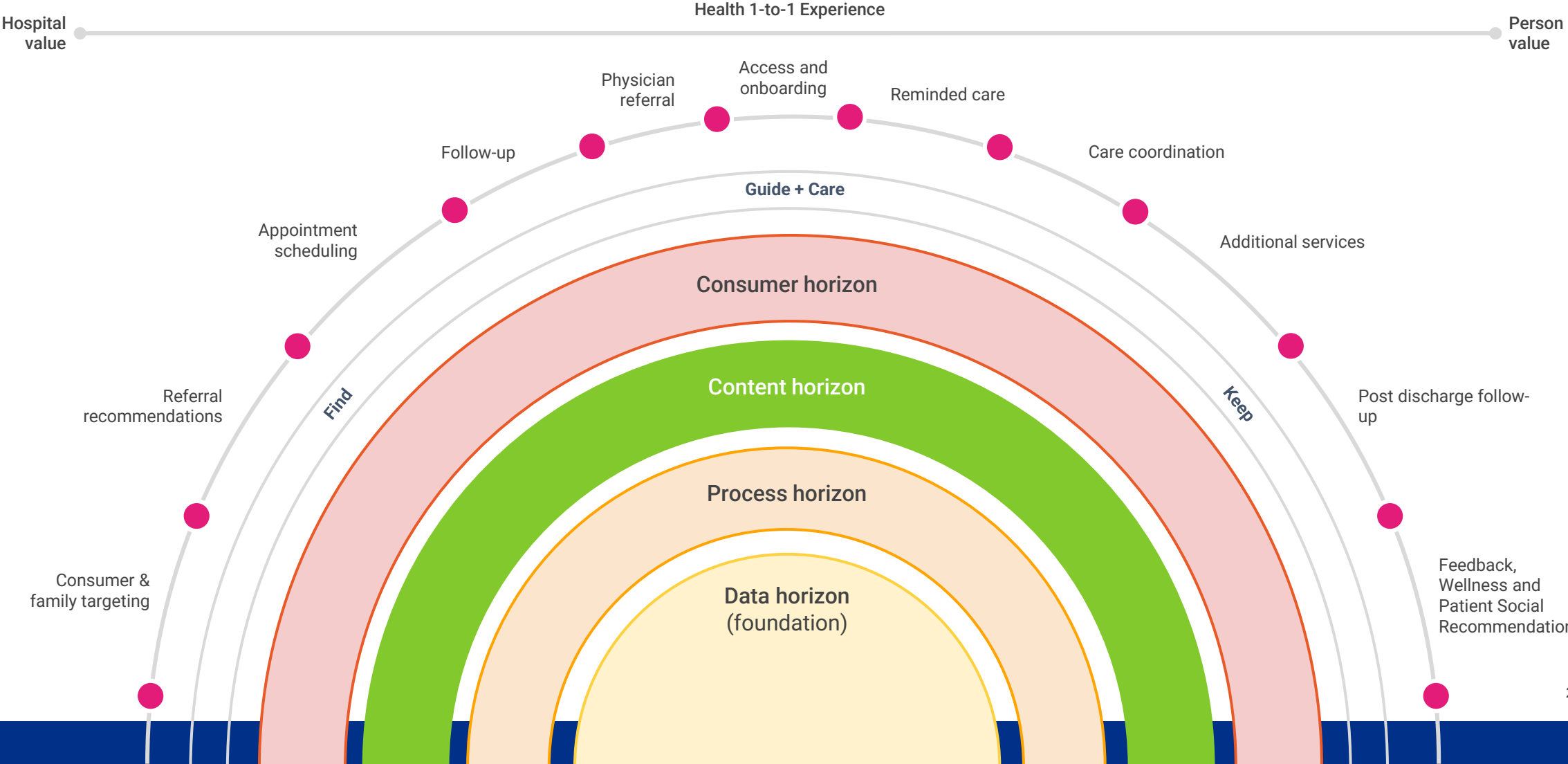


Indisputable Marketing ROI Model

- Integration of marketing campaign metrics (e.g., source, medium, clicks, leads) with clinical (e.g., appointments, procedures) and financial (e.g., net revenue, contribution margin) data on a single platform
- Dynamic campaign attribution reporting

Enterprise CRM - The Health 1:1 Experience

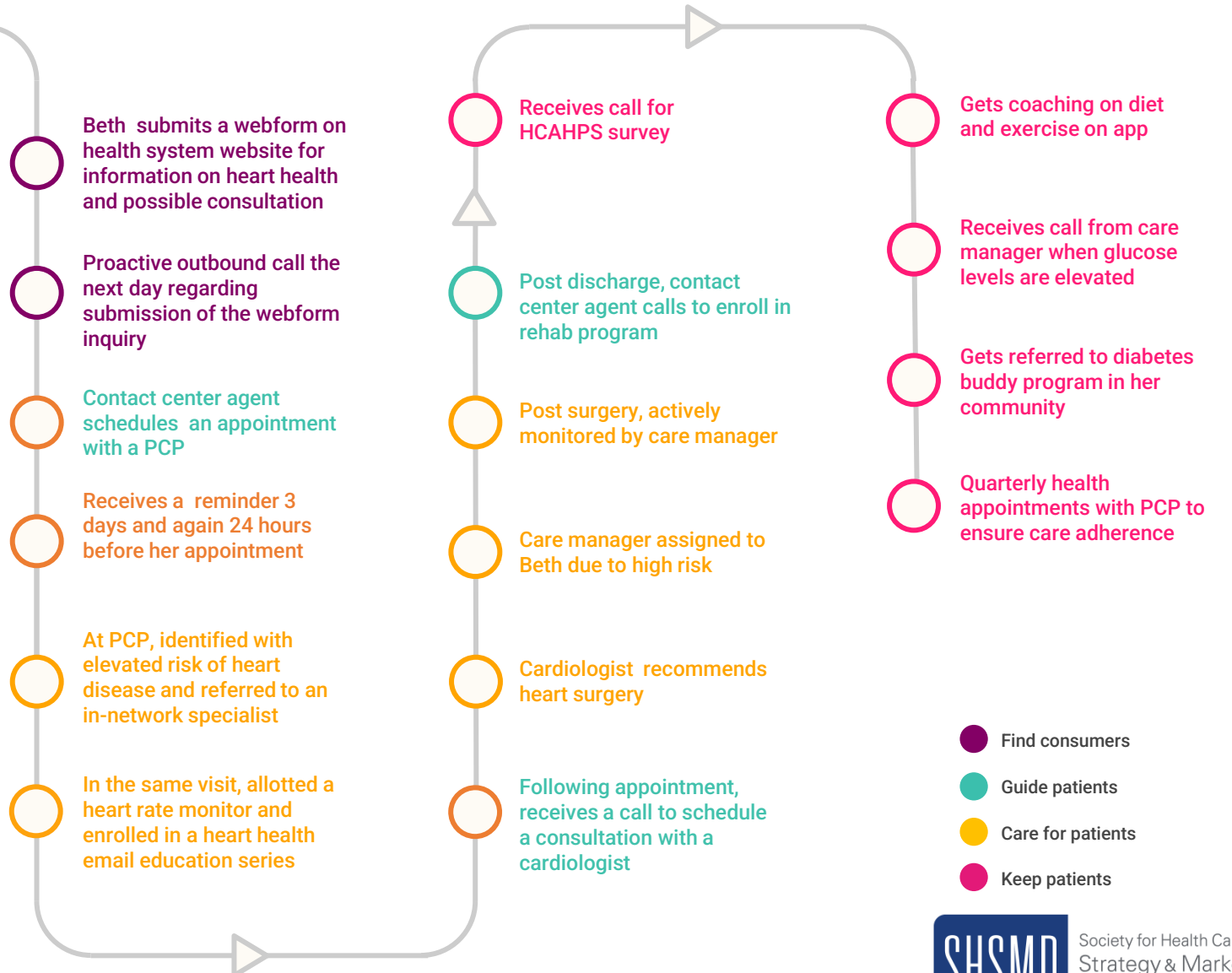
The right data, the right message to the right person at the right time. All the time.



Beth, 67 with a heart condition and living alone

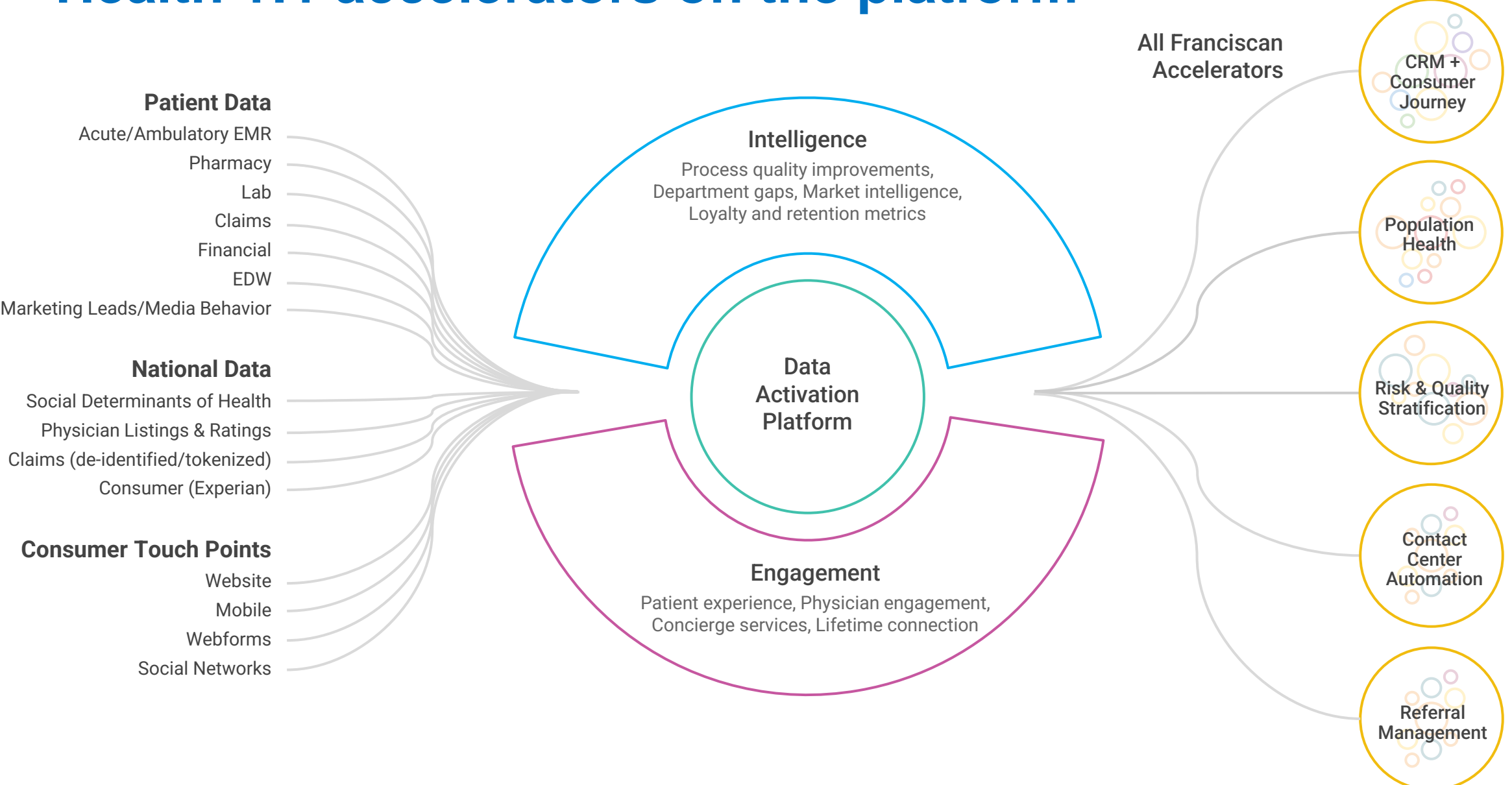
The reimagined automated patient experience:

Find, guide and keep patients for life



- Find consumers
- Guide patients
- Care for patients
- Keep patients

Health 1:1 accelerators on the platform



Experience Center: Single Pane of Glass

CRM
Worklist
Patients

Support
9+
9+
MS

Martin, Angela

02/01/1982 (40y), Female

EMPI / ID
P087636 11 MRN

PCP
Dr. Jim Halpert

Plan
BCBS PPO

Phone
(860) 944-1361

Risk
HIGH

SVI
HIGH

JD
NJ
Martin, Angela

+ New

- 📁 Patient 360
- 🗨 Care Management
- 📅 Episodes
- ❤ Risk
- 📄 Claims
- 👤 Profile
- 📝 Manual entry
- 📞 Contact Center

Tickets

Status All
Type All
Assignee All

Showing 1-10 of n items Showing 3 of 3 columns

Subject and ID	Type	Status	Assignee
Annual Wellness Exam #APT123456	Request Appointment	● Completed	John Doe
General monthly check-up APT3456278	Request Appointment	● Completed	Josephine Pittman
General monthly check-up #APT92831	Request Appointment	● Completed	Effie Myers
Claim not processed #GRI567289	Grievance	● Pending	Hester Spencer
Claim processed incorrectly #GRI987456	Grievance	● Completed	Ruth Maldonado
Covid vaccination Details #INF378945	Information Request	● Pending	Jennie Mason
Annual Orthopedic Seminar #EVT137682	Event Registration	● Pending	Jennie Mason

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Personal information

Last updated on 04/12/2022

- 🌐 Language English (USA) ✔
- 📞 Mode of Contact Phone
- 🕒 Time of contact Wednesday: 2pm - 5pm
Friday: 2pm - 5pm

Personal details

- 👤 Ethnicity Hispanic
- 👤 Marital status Married
- 👤 Race White
- 👤 Employer Not available

Events

- 👤 Orthopedic Seminar Scheduled on 5/12/2022
- 👤 Quarterly Fitness Event Awaiting Confirmation
- 👤 Daily Health Checkup Awaiting Confirmation

Campaigns

- 👤 Orthopedic Campaign Scheduled on 05/15/2022

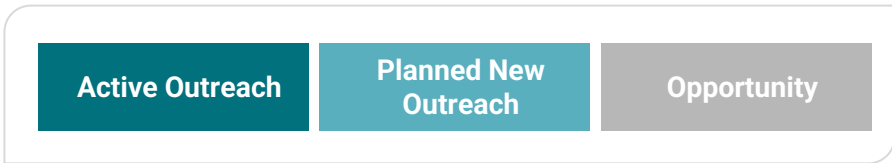
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Martin, Angela

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Leverage shared outreach tools for more impact



Quality Improvement & Wellness
Engage patients in activities to improve health and wellness

Education
Improve health literacy and care navigation

Growth & Loyalty
Messaging to influence awareness, activation, access, and loyalty

Annual Wellness (AWV / CWV / Physicals)

Breast Cancer Screening

Know Before You Go (PCP vs. UC vs. ED)

Disease Management Information

Establish PCP (e.g. Employee Engagement)

Patients Lost to Follow-up

Cervical Cancer Screening

Colorectal Cancer Screening

In Network Provider Options

Service Line Welcome (scheduling TY)

Primary Care redirect (e.g. UC visits)

Demand Gen (individualized services rec.)

Overdue Refills (Med Adherence)

HbA1c Testing / Eye Exam (Diabetes)

New Mover (Into or Within Service Areas)

Patient portal activation

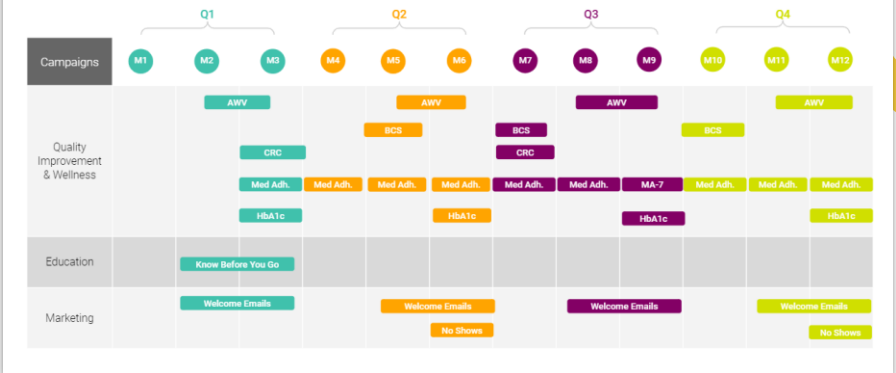
Immunizations (e.g. Flu)

Scheduled Visit No Shows

Continuous Outreach Planning

How can we best support you in executing a continuous, year-round outreach strategy?

- Scheduled campaigns (example calendar below)
- Responsive messaging (real-time)
- Measured outcomes (VE value studies)





So, what's next?

How and where to get started

Healthcare Consumer Engagement

Phase 1

A Create an activation engine powered by Marketing Data Activation Platform (MDAP)

- **Consumer data platform:** Expand data pipeline; create 360-degree longitudinal profiles combining marketing, clinical, financial, etc. data.
- **Marketing agency integration:** Create direct ingestion pipeline for third party agency data to bolster and enhance ROI model.
- **Contact Center Agent desktop:** Enable signature patient experiences by creating a single pane of glass interface complete with telephony and data platform integration.

Phase 2

B Add and enhance workflows

- **Campaign dashboards:** Create robust KPI dashboards to track campaign performance and strategic service line growth.
- **Referral and appointment management:** Incorporate scheduling and referral capabilities into the engagement center platform to improve one engagement resolution.
- **Agent upskilling:** Empower contact center agents to help individuals beyond appointment scheduling with next-best-actions and health management.

Phase 3.....and beyond!

C Holistic End-to-End Patient Journey

- **Predictive intelligence:** Proactive outreach and response focused across multiple journey stages including acquisition, clinical and wellness.
- **Personalization:** Personal content delivery and cross service line tracking and ability to target cohorts using clinical predictive models.
- **Seamless care management integration:** Facilitate end-to-end care journeys across designated service areas and value-based care initiatives.
- **Ecosystem:** Connect wide range of applications via APIs to expand 360-degree profile and experiences.

IMPACT

Improve topline and bottomline
Expand community impact

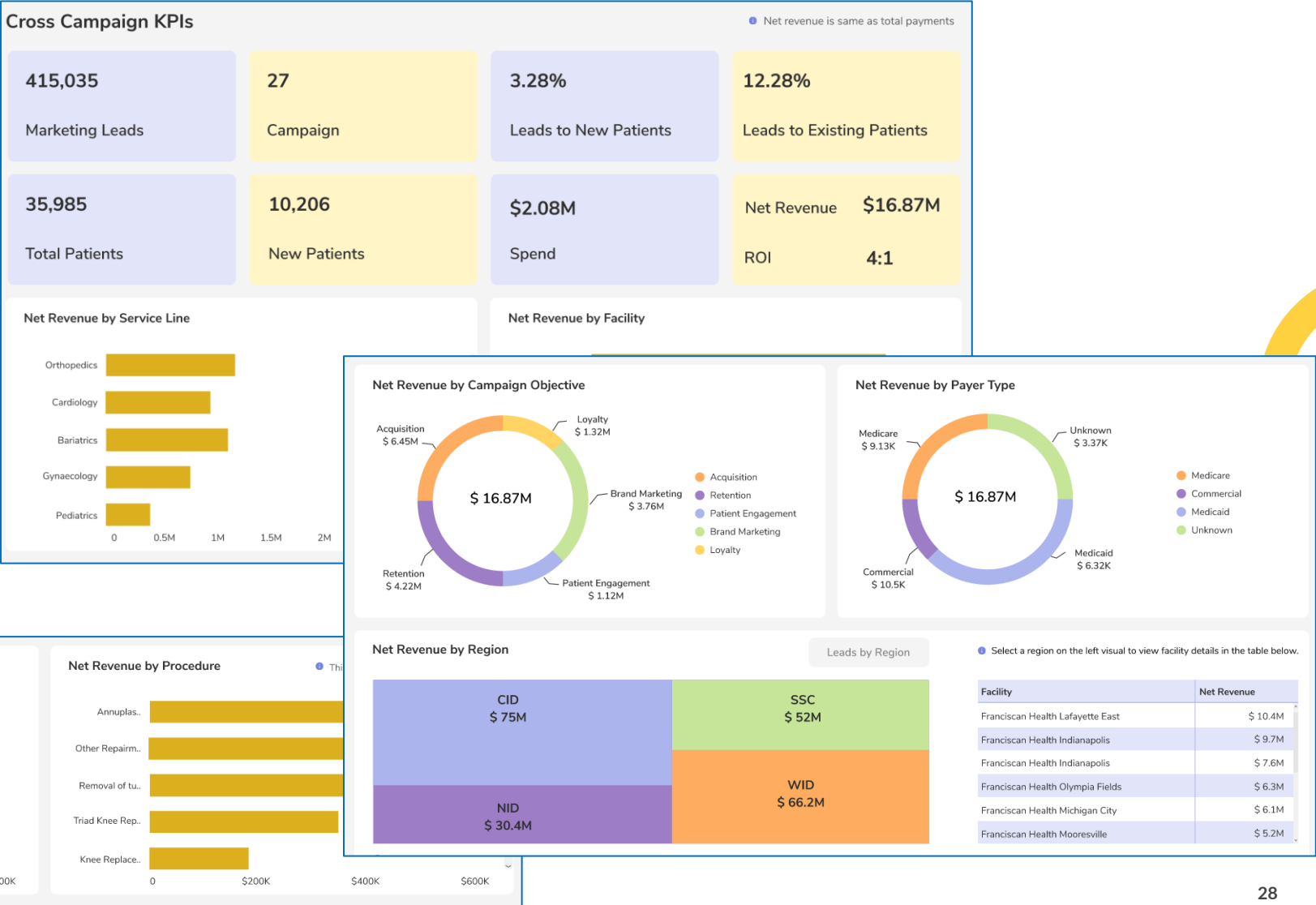
Program Value

Person-Centric Value



CRM: Tie Marketing Spend to Refined Clinical Outcomes

Tie campaign performance metrics to tightly defined clinical outcomes – by Objective, by Region, by Procedure - that, in turn, translate to growth AND savings



Pop Health: Increase ROI through TCM workflows

Direct revenue generation (assuming 50,000 members)

Eligible population for TCM	12,500
# successful outreach for TCM	3,125
Average TCM Bill Rate	\$197
Total Revenue	\$680,641
Average Revenue Per Member	\$13.6

Additional impact: Reducing readmissions

Average cost of a readmission (per MSSP)	\$16,800
Expected Readmission Reduction	2%
Expected Reduced Readmissions with TCM	90
Total Savings	\$756,000
Average Savings Per Member	\$15.6

Cost assumptions

Labor Cost (total cost / % of total cost)	\$103,906 / 63%
Tech Cost (total cost / % of total cost)	\$60,000 / 37%
Total Cost	\$163,906

Total projected ROI = 8x
 (\$s in TCM Billing + \$s in reducing readmissions) / (labor cost + tech cost)

Reminder: Health 1:1 goes wayyyy beyond marketing

VBC Operational Programs and Gainshare Revenue

Align operational programs with prioritized value realization and increase shared savings PMPY.

Reduce SNF Spend
Manage Chronic Conditions
Improve Quality Measures
Optimize Coding Accuracy
Contract Negotiation
Payer Resolution Support

CRM Growth Programs and Gainshare Revenue

Align prioritized acquisition programs with measure value realization, reduce patient leakage and improve patient lifetime value.

Lead Volumes & Cumulative Lead Growth
Lead Source Conversion Rates
Cost Per Acquisition
New Patient Conversion Rates
Existing Patient Conversion Rates
Payer Mix by Converted Patient Type
Revenue by Diagnosis and/or Procedure

VBCRM Operational Programs, Transactional Outcomes and Gainshare Revenue

Align operational programs to increase FFS and VBC outcomes, and increase shared savings PMPY while reducing patient leakage and improving patient lifetime value.

Reduce 30-Day Readmissions
Reduce ED Spend
Improve Health Equity
Reduce Patient Leakage
Increase Patient Lifetime Value
Re-Engagement Rates of Dormant Patients
Cost Per Clinical Conversion

Minimize Network Leakage
Annual Wellness Visits
Transitional Care Mgmt.
Chronic Care Management
Remote Patient Monitoring

You must create scalable and configurable “building blocks” to support your Growth *and* Value Based journey



Questions?



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Questions?

Please be sure to complete the session evaluation!

