



Data Forward Strategies for Growth

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Goals for Today

- Effectively use market data to define successful strategies
- Target the right service lines and providers to make an impact on marketing initiatives, improve network integrity, and drive business development
- Learn best practices from Penn Medicine's approach - what works and what doesn't

Growth is a team sport that requires intentional focus across a health system to achieve. Additionally, healthcare growth is becoming increasingly contingent on digital and data-forward strategies to address both the consumer and provider aspects. Today we will outline key growth initiatives and how Penn Medicine is tackling these challenges using claims and consumer data integrated into their marketing and business development workflows.

Alert: I'm the data person!

Framework for Our Session

The role of data-driven strategies in the healthcare industry



Case Study: Data-driven physician engagement strategies

Essential data sources in healthcare marketing



Case Study: Data-driven campaign planning

Expected benefits of data and platform enablement



Case Study: Data-driven customer experience strategies

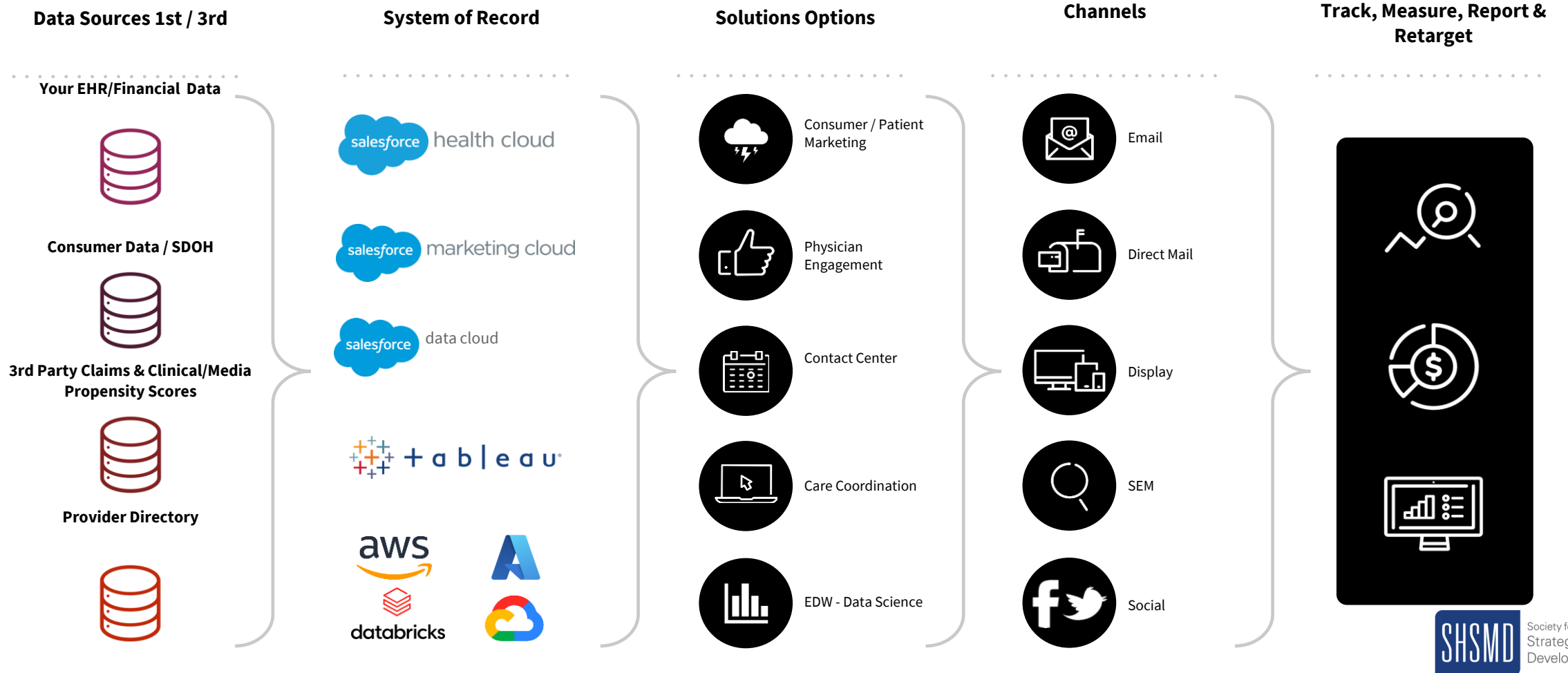
Data-driven strategies have always existed, so, *what is different now?*

THE ROLE OF DATA-DRIVEN STRATEGIES IN THE HEALTHCARE INDUSTRY

- ▶ The healthcare landscape is constantly evolving and emerging brands are making it harder to compete in many markets for many key services ...*who is offering what now? (she says with a Philly accent for those who are reading this)*
- ▶ Leveraging data is necessary to optimize patient and physician engagement, improve outcomes, and enhance overall healthcare experiences and many hospitals are investing deeply in this area ...*Penn created a new department one year ago lead by our first formal CDAO.*
- ▶ *Effectively* integrating market and consumer data into healthcare marketing strategies is essential for marketing departments to maximize budget ...*we've all been trying to do this the entire time; we now must do this more effectively and sometimes with smaller budgets!*
- ▶ Data privacy is complex and more important than ever ...*Penn completely transformed our entire portfolio for data collection and usage*
- ▶ Generative AI ...*I asked ChatGPT*

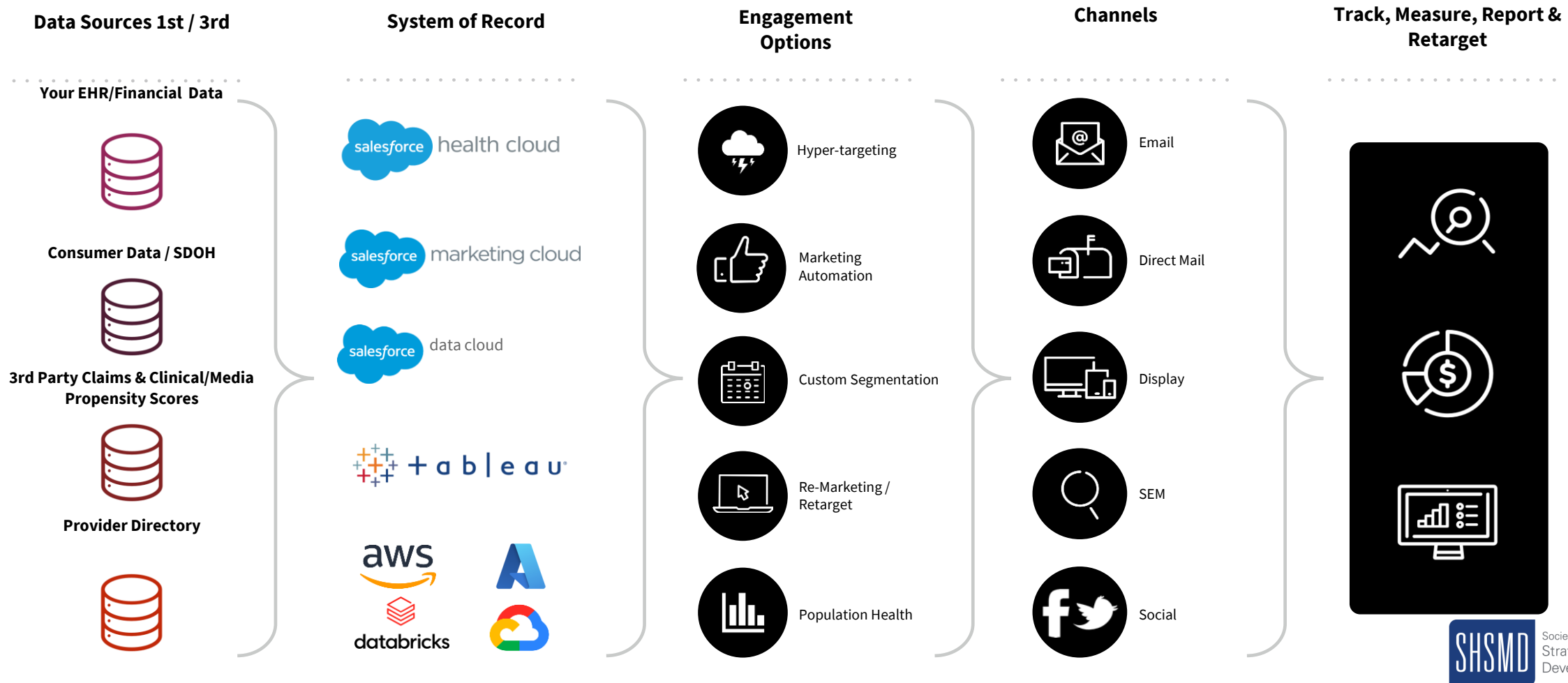
Downstream Data Flow to Key Applications

ESSENTIAL DATA SOURCES IN HEALTHCARE MARKETING



Downstream Data Flow to Key Applications

ESSENTIAL DATA SOURCES IN HEALTHCARE MARKETING



How do you evaluate your options?

ESSENTIAL DATA SOURCES IN HEALTHCARE MARKETING

Penn Medicine began a one-year process to align on our priorities and desire to evolve and evaluated several vendors and agencies against the same rubric to determine the best fit for Penn

1. SUPPORT
Overall support model, training options, overall relationship and alignment to scope

2. DATA ACCESS
Access to foundational datasets, integrations with CRM and other applications

3. DATA QUALITY
Market coverage, payor representation, data lag, strong documentation and QA

4. USABILITY
Ease of use/access of all products, but mainly self-service tools and organization of output

5. PRODUCT METHODOLOGY
How models and product offerings are built and how flexible they are to use

6. DEMOGRAPHICS
What demographic data is available and maintained

Data-driven strategies make decision-making easier

EXPECTED BENEFITS OF DATA AND PLATFORM ENABLEMENT

- ▶ Data-driven strategies are based on actionable insights rather than assumptions ...*the transformation Penn went through has allowed us to bring data into every decision we make and even disproving some assumptions*
- ▶ Data-driven strategies yield a higher return on investment ...*this allows Penn to maximize the use of budgets and quickly share results with our CFO, making those conversations more effective*
- ▶ In an industry where patients are becoming much more empowered, data provides us with insights into customer behavior, preferences, and needs ... *this understanding allows us to improve experiences more quickly and meet our patients and physicians where they are*
- ▶ Insights can trigger automated workflows that deliver timely and relevant content to patients and referring physicians ...*this reduces manual work, and allows testing to happen much quicker*
- ▶ These same insights can trigger automated workflows to call center agents, liaisons, and other clinical staff ...*transforming traditional customer service into modern, engagement centers*

How Penn uses claims data today

CASE STUDY: DATA-DRIVEN PHYSICIAN ENGAGEMENT STRATEGIES

Quarterly targeting and impact

- Top private physicians for liaison outreach
- A mix of loyal, splitter, and new
- Focus on new patients to Penn for key services
- Quarterly impact is analyzed with both claims data and EMR data

Employed practice leakage

- Deep assessment of pathway trends for employed practices
- Marketing and clinical leadership review biannually for alignment of strategies
- Surveys and other data used to identify issues

Profiling for ongoing engagement

- Integrated trends from claims such as volume, practicing facilities and networks for easy assessment prior to outreach
- Integrated into CDP for segmentation and personalization

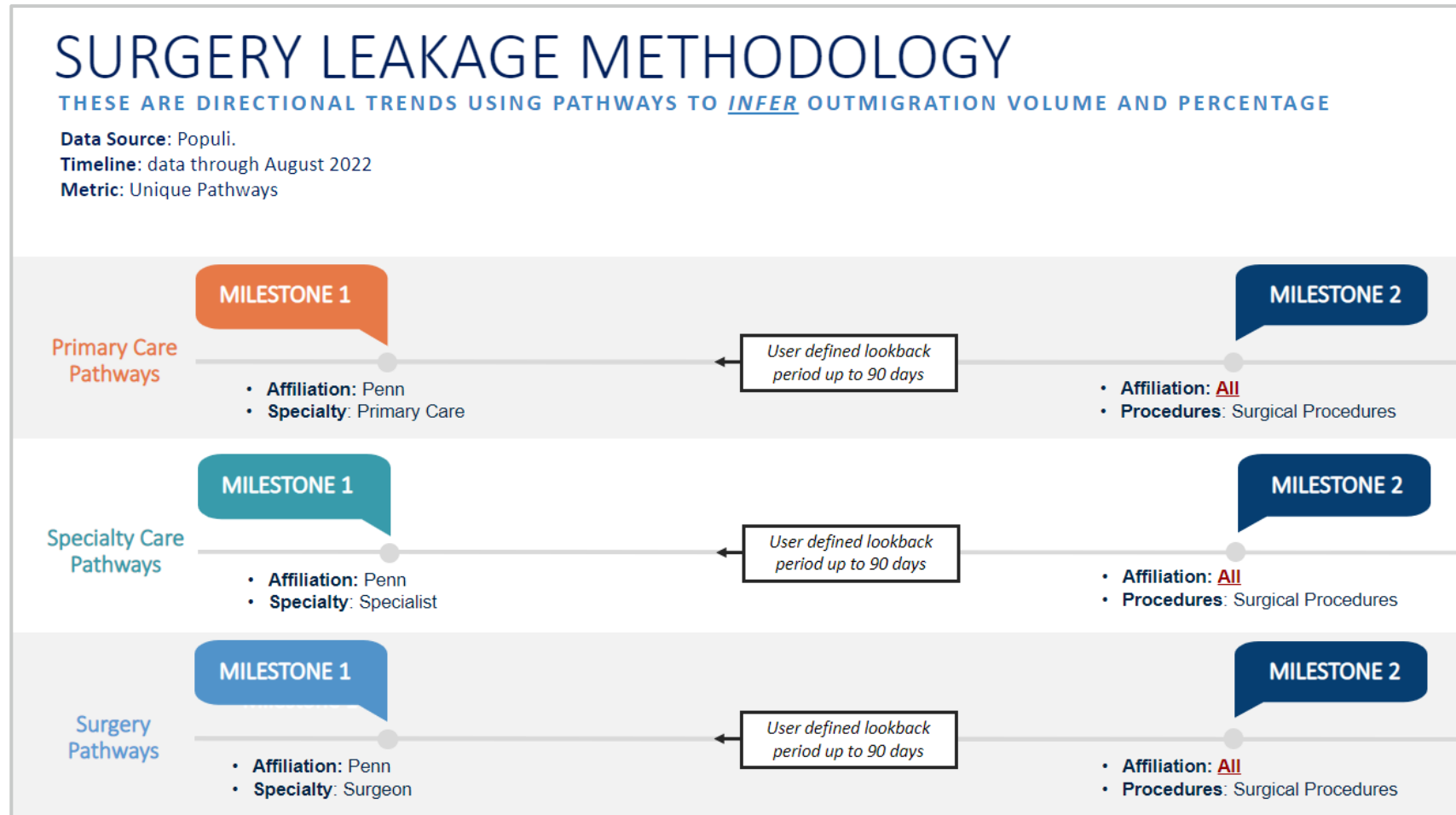
Market or program evaluation

- Custom analysis for key emerging markets or programs
- Procedure and/or diagnosis-specific pathways
- Supports exploration of clinical priorities or market shifts

Example of “leakage” report

CASE STUDY: DATA-DRIVEN PHYSICIAN ENGAGEMENT STRATEGIES

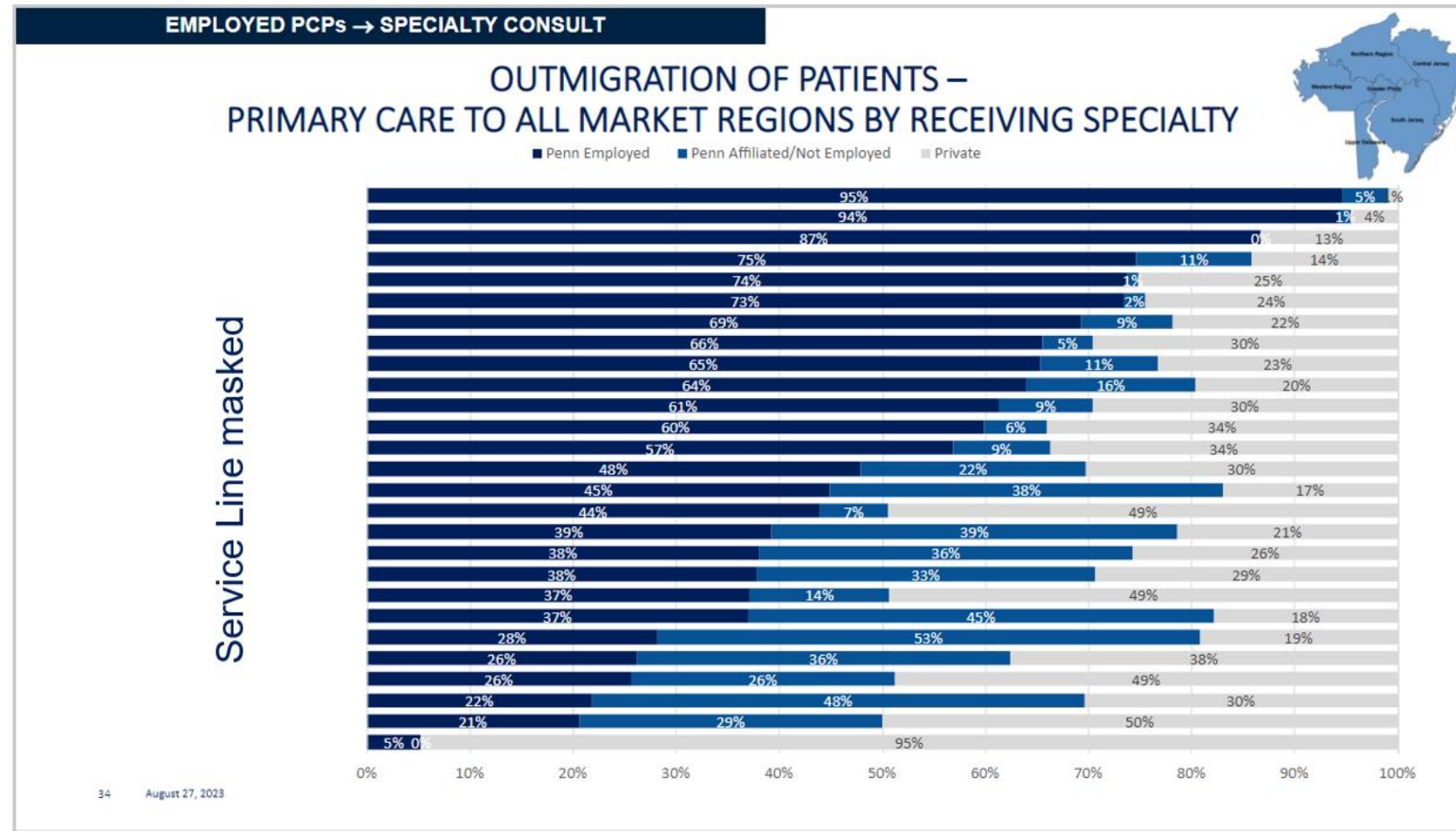
- One of a few examples of standard reports we focus on includes our surgical leakage report.
- Methodology includes pathways from primary care, from appropriate specialists and even from surgical areas



Example of Data or Tool Used

CASE STUDY: DATA-DRIVEN PHYSICIAN ENGAGEMENT STRATEGIES

- This report looks at outmigration for new patient consults with a specialist from a Penn primary care practice
- This is just one view from a complex dashboard with various views into the trends
- From these findings, we work with practices where “leakage” rate is over the benchmark



What We Learned and What's Next

CASE STUDY: DATA-DRIVEN PHYSICIAN ENGAGEMENT STRATEGIES

What We Learned

1. You will not get complete agreement from the organization when it comes to defining “leakage” and what to do about it
2. It's way more complicated than just looking at claims/referral insights
3. Having direct access to the data is an important factor to successfully understanding the data, but it does take time and resources to master

What's Next

1. Expanded use of PRM
2. Integrating claims (derived insights) into CDP and other channels
3. Automating alerts out to practices and other clinical stakeholders

How Penn is tackling campaign planning

CASE STUDY: DATA-DRIVEN CAMPAIGN PLANNING

Annual goal setting

- New annual planning process that formally incorporates service line growth goals, previous campaign performance, and more to set lead goals for the year
- Alignment of growth goals and available budget
- Supply/demand model

Quarterly planning process

- Formal quarterly evaluations of progress towards growth goals
- Redistribution of budget and/or resources to meet goals

Channel decision process

- Consistent measurement of conversion rates at every milestone of the journey
- Comparison to benchmarks
- Redirecting of resources and focus on under-performing channels

Digital channel optimization

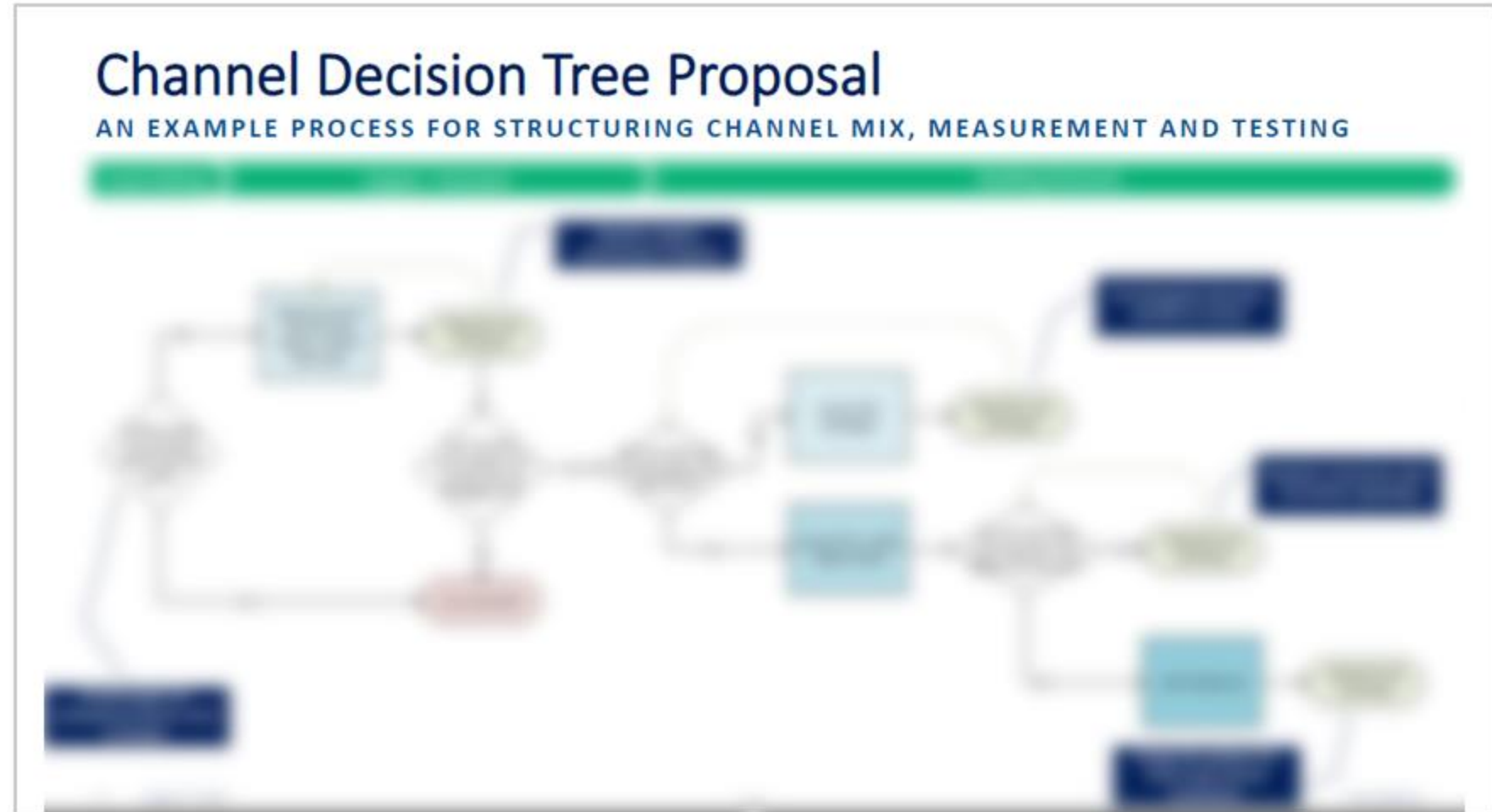
- SEM optimization and ensuring complete capture of available search volume
- Use of predictive modeling for all other digital channels
- Audience analysis

Example of Data or Tool Used

CASE STUDY: DATA-DRIVEN CAMPAIGN PLANNING

While a single, strict process cannot account for all campaign planning, going through these steps allows us to:

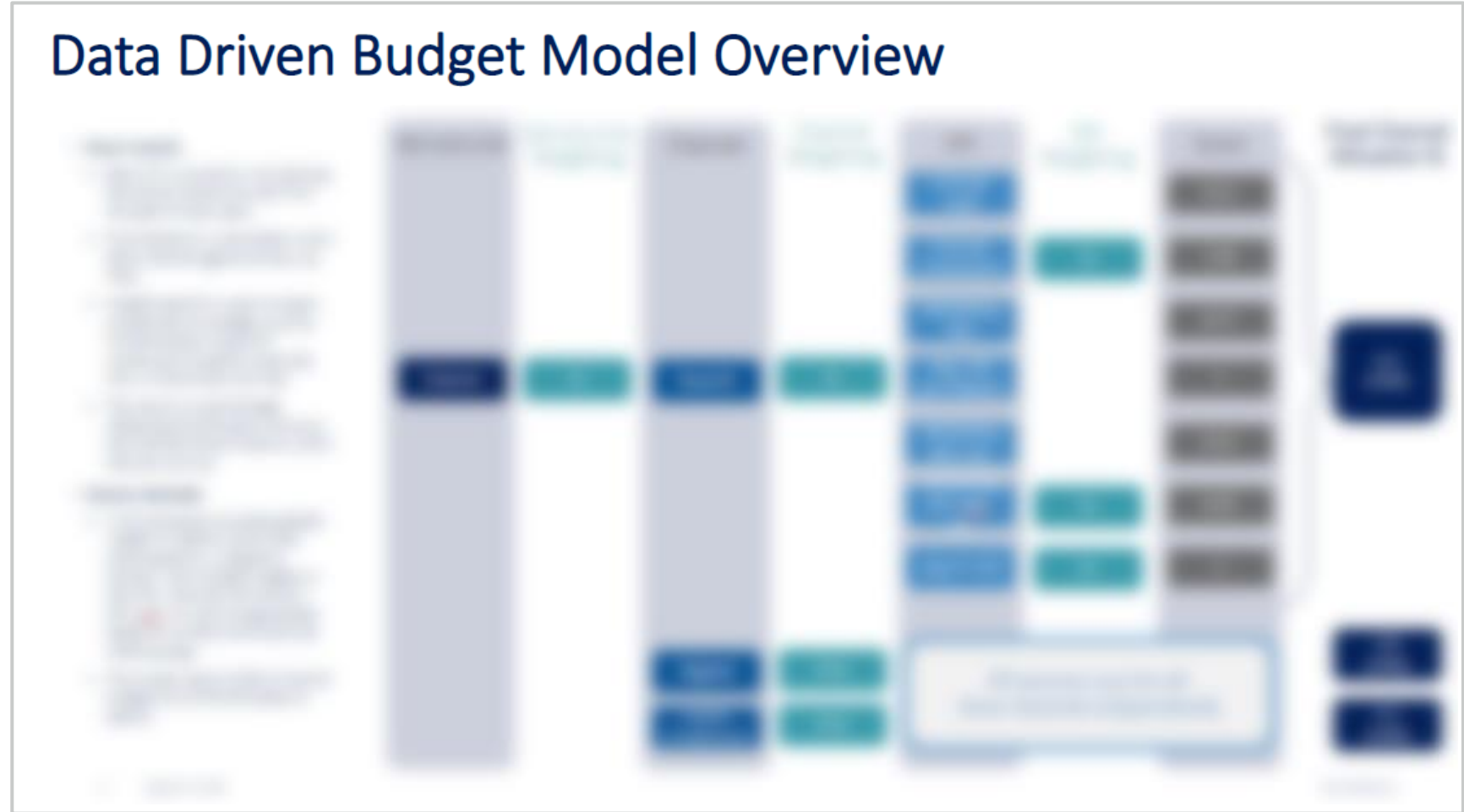
- Question our thinking
- Use data to identify which channels (owned and paid) need to be optimized
- And allows us to eliminate more expensive channels if we're not optimized to current qualified leads



Example of Data or Tool Used

CASE STUDY: DATA-DRIVEN CAMPAIGN PLANNING

- Setting lead goals internally allows us to tie back to actual patients and distribute across channels in a way a single agency may not be able to do
- This is not a set it and forget it process – lead goals are adjusted as new data is generated
- These goals are shared transparently with all partner agencies



What's Next and What We Learned

CASE STUDY: DATA-DRIVEN CAMPAIGN PLANNING

What We Learned

1. You can't start from scratch
2. Quarterly planning is needed across service lines and within service lines
3. Physician campaigns are harder to wrangle due to dependency on third-party platforms
4. You will not get everyone to agree on every data input, so just start somewhere
5. Have this be someone's job, not everyone's job

What's Next

1. Use of third-party data to assist in lead setting and forecasting
2. Expanded campaigns with greater focus on digital channels
3. Alignment of conversion rates and benchmarking
4. New digital analytics platform

How Penn is tackling customer experience transformation

CASE STUDY: DATA-DRIVEN CUSTOMER EXPERIENCE STRATEGIES

Cross-Functional Governance

- Governance from all core areas of the health system
- Focus on transforming the patient experience

Enterprise CRM

- All agents using a single CRM
- Integrating household data and other models so agents can have better informed transactions
- With all transactions recorded in CRM, mapping back to campaigns will improve targeting

Upgrade to omnichannel experiences

- Upgrading telephony platform
- Expanding channels to include text, email and chat
- 35% of calls automated by year three

Consumer Preferences

- Expansion of CDP
- Expansion of consumer preference center
- Integration of preferences into all other platforms for aligned communication and messaging

Example of Data or Tool Used

CASE STUDY: DATA-DRIVEN CUSTOMER EXPERIENCE STRATEGIES

- Governance was key to building momentum and ensuring priorities were aligned and transparent
- Setting expectations for outcomes is key to keeping momentum
- Customer data is at the core of enabling all these experiences



What's Next and What We Learned

CASE STUDY: DATA-DRIVEN CUSTOMER EXPERIENCE STRATEGIES

What We Learned

1. This level of transformation requires significant focus and dedicated resources
2. Data and technology is the least complicated of the transformation process
3. Data integrated into this type of integrated technology stack can enable so much - stay focused on your top priorities
4. Ensure ethical use and compliance with healthcare data regulations

What's Next

1. We are in the middle of a three-year transition
2. Enterprise CRM and new telephony goes live this winter
3. Integrating third-party data and NBA for agents and automation on any channel available to patients in spring
4. Strategy for physician engagement



Questions?

Please be sure to complete the session evaluation!



Speaker Bio

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Robin Ward

AVP, Customer Analytics & Technology



Experienced Marketing Technology and Analytics Leader

- ➔ *Over 25 years in marketing data management, CRM, digital platform management, marketing automation, data visualization, marketing analytics, and market research.*
- ➔ *Experience in Salesforce, Marketing Cloud, Sitecore, SQL, Tableau, Google 360, among others.*
- ➔ *Guided by a genuine commitment to improving the patient and physician experience.*



Penn Medicine