CRM in Healthcare: the path forward for engagement

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Jeff Fisher, Product and Client Strategy, Intraprise Health
DVHIMSS 2018
Digital Healthcare Consumer Paradox

Secure with Vigilance™

Health Information Security Services

Certified HITRUST Assessor since 2011

Engage with Insight™

Enhanced Care Coordination

Digital Ecosystems for Service Line Acceleration
Inspira Health Network

- Southern New Jersey
- 3 Hospitals & 2 Health Centers
- 150+ care access points
- 1,100+ member medical staff

Key systems
- Cerner Millennium
- Soarian Financials
- InFor
- Microsoft (Office, AD, Azure, Dynamics)
The Inspira Promise

Our promise is to deliver high quality care in a completely safe environment while using all of Inspira’s resources and capabilities to exceed patient expectations.
Delivering the Inspira Promise

WOW Me
Go beyond expectations

Heal Me
Provide high quality outcomes

Don’t Hurt Me
Provide safe care
Guiding Principle
Pressing need

In-source customer service function branded as Healthcare Concierge – 1-800-INSPIRA

Own every touchpoint with the consumer
The Case for CRM

Health Consumer Journey

Awareness
- Marketing
  - PRM

Consideration
- Information Access
  - Customer Svc

Purchase
- Choice

Service
- Delivery of Care

Loyalty
- Repeat Customer?
  - Health+

Opportunity

HIS Traditional Reach

Opportunity
How else can we leverage CRM toward the creation of an Engagement Ecosystem?
Proliferation of Ideas

Emphasis on technologies experienced outside of Healthcare

Examples include: Apps, Home Assistants, Beacons, and Bots
Development of Approach

Focus centered on Patient Engagement

Ride the wave with other key systems’ initiatives (Cerner)

Features and capabilities must be compelling and align with digital natives’ expectations

Understand data needs and where data should live
Strategic Evaluation
Understanding of fit with overall roadmap

Vendor solutions assessed according to “plug-ability” into ecosystem

Are they architected to support web services integration?

Are they willing and able to federate identity?

Can user engagement with their platform be instrumented? How else will we measure ROI and solution efficacy?
Deeper Collaboration with Marketing and Operations

What can and should set us apart from our competitors?
How does consumerization and engagement contribute to marketing?
How does innovative engagement technology intersect with operations?
Multi-channel Engagement

Options to engage across all demographics

Meet consumers where they are in the “digital journey”
Prioritize Security and Privacy

- Health Consumer Paradox -
Multiple consumer “entry points” introduces privacy and security risk

Mitigate risk by unifying consumer identity and controlling vendor platform access through common framework
Instrument, Inform, Repeat

Record and analyze all health consumer engagement

Inform future initiatives with insights

Create a third Decision Support dimension
User Channels

Services

Engagement
- Access
- Experience
- Accountability
- Transparency
- Operations

Platform
- Security, Privacy, & Compliance Management
  - Identity Management
  - Consent Management
- Azure
  - Operations & Engagement Decision Support
- Instrumentation Management

Infrastructure
- Workflow Processing
- CRM Functions
- Data Management
- Engagement Event Logging
- Operations & Engagement Decision Support
- App & Vendor Management
- Instrumentation Management
Inpira Innovation Center & Inspira Health+
Inspira Innovation Center
**Timeline**

**July 17’**
- Tech Bar Design
- Program Design
- Pop Health and COACH

**August - Sept 17’**
- Staffing Complete
- Health Actions are Invented
- Kiosks Installed
- Staff Orientation

**Oct 17’**
- App Live
- First “field test”
- Patient

**Jan 18’**
- IRB approved
- PREP Program starts

**Nov 17’**
- IRB, Clinical Trial
- Process Starts
- Service line in-service

**June 18’**
- Bariatrics (Post) begins
Internally-facing

- Access Center Customer Service
- Physician Relationship Management
- Service Line Orchestration
- <HR Customer Service>

Consumer-facing

- My Inspira app
- Inspira Compass app
- InspiraHealthNetwork.org
- Inspira FB Messenger Chatbot
- Inspira Alexa Skill
Curated Solutions

Identity & Authentication

User Channels
Curated Solutions

User Channels

Identity & Authentication
Physician Relationship Management
PRM - Manager Dashboard
# Health+ Initiative – Health Actions

## Patient Information

**Patient Number:** 900065603

### Patient Demographics

- **Assigning Authority:** Internal
- **MRN or Unique ID:** 900065603
- **First Name:** MICHAEL
- **Middle Name:** --
- **Last Name:** TESTPATIENT
- **Date of Birth:** 6/26/1983
- **Gender:** Male
- **Race:** White
- **Religious Affiliation:** --
- **Patient Contact:** MICHAEL TESTPATIENT
- **Source:** ORM

### Actions, Attestations & Data

#### Patient Health Actions

<table>
<thead>
<tr>
<th>Action Type (Health Action Item)</th>
<th>Display D...</th>
<th>Name (Health Action Item)</th>
<th>Description (Health Action Item)</th>
<th>Repetitions Rx...</th>
<th>Action Interval Typ...</th>
<th>Start Date</th>
<th>End Date</th>
<th>Completed</th>
<th>Health Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measurement</td>
<td></td>
<td>Record your blood pressure</td>
<td>During your measurement, sit down on the floor...</td>
<td>2 Day</td>
<td>2/12/2018</td>
<td>5/25/2018</td>
<td>No</td>
<td></td>
<td>Blood Pressure</td>
</tr>
<tr>
<td>Measurement</td>
<td></td>
<td>Record your oxygen level</td>
<td>Record while breathing oxygen, if available/Be seated, rest...</td>
<td>2 Day</td>
<td>2/12/2018</td>
<td>5/25/2018</td>
<td>No</td>
<td></td>
<td>Blood Pressure</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>Drink 10 - 12 glasses of water every day</td>
<td>Each glass should be approximately 8 ounces or more...</td>
<td>1 Day</td>
<td>2/12/2018</td>
<td>5/25/2018</td>
<td>No</td>
<td></td>
<td>Blood Pressure</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>Take a light/casual walk for 30 minutes</td>
<td>It is recommended to do some light stretching for 5-10 minutes...</td>
<td>1 Week</td>
<td>2/12/2018</td>
<td>5/25/2018</td>
<td>No</td>
<td></td>
<td>Blood Pressure</td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td>See your Doctor as recommended</td>
<td>If an appointment needs to be scheduled or rescheduled...</td>
<td>1 Open</td>
<td>2/12/2018</td>
<td>5/25/2018</td>
<td>No</td>
<td></td>
<td>Blood Pressure</td>
</tr>
</tbody>
</table>

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Created By: [Interpretation EMR]  Modified By: [Interpretation EMR]

Patient Name: CAROL M JONES  
Date Of Birth: 9/23/1964  
Age: 53 Years 6 Months

**Health Data Tracker**

<table>
<thead>
<tr>
<th>Measurement Type</th>
<th>Value 1</th>
<th>Value 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blood Pressure</td>
<td>129.0000 mmHg</td>
<td>91.0000 mmHg</td>
</tr>
<tr>
<td>Blood Pressure</td>
<td>129.0000 mmHg</td>
<td>84.0000 mmHg</td>
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<tr>
<td>Blood Pressure</td>
<td>130.0000 mmHg</td>
<td>60.0000 mmHg</td>
</tr>
<tr>
<td>Blood Pressure</td>
<td>120.0000 mmHg</td>
<td>60.0000 mmHg</td>
</tr>
<tr>
<td>Blood Pressure</td>
<td>120.0000 mmHg</td>
<td>65.0000 mmHg</td>
</tr>
</tbody>
</table>
My Inspira App
- UCC check-in
My Inspira App
- Health Actions
Service Line Orchestration – Bariatrics @ Woodbury

Marketing
- Campaigns
- Word of Mouth
- Referrals

Consult
- Applicability
- Readiness
- Cost - Insurance

Act - Prepare
- Mandatory Education
- Psych Eval
- Prep Tasks

Surgery
- Navigation
- Family updates
- Comfort & Clarity

Consult
- My Inspira
- Wearables
- Health Action
- Attestation

Marketing
- Microsoft Dynamics 365
- Marketing List
- Candidate Tracking
- Education and Nudging

Bariatric Navigator
- Microsoft Dynamics 365
- Event Attendance Tracking
- Intervention and Nudging
- SMS / Email / Phone

Bariatric Coordinator
- Microsoft Dynamics 365
- Assign Welcome Health Action
- Record interactions
- “Prescribe” My Inspira

Bariatric Patient
- My Inspira
- Wearables
- Health Action
- Attestation

Increase Patient Volume
Patients for Life

Improve Outcomes
Wow Patient
Inspira Compass App

* Currently in app stores as “Inspira Compass”
Inspira Messenger Chatbot
Findings

• Inspira Health+ Initiatives
• Urgent Care Volume
• Referral Insights
Lessons Learned

- Serves as introduction and foundation for wearables
- High potential for service lines
- Health Actions have ubiquitous value
- High touch path required for chronic and co-morbid patients
Increased Urgent Care Volumes

<table>
<thead>
<tr>
<th>Month</th>
<th>Year</th>
<th>Onsite</th>
<th>Remote</th>
<th>Urgicare Patient Volume</th>
</tr>
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<tbody>
<tr>
<td>Oct</td>
<td>2016</td>
<td>41</td>
<td>3,128</td>
<td>3,169</td>
</tr>
<tr>
<td></td>
<td>2017</td>
<td>365</td>
<td>5,389</td>
<td>5,754</td>
</tr>
<tr>
<td>Nov</td>
<td>2016</td>
<td>74</td>
<td>2,119</td>
<td>2,193</td>
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<tr>
<td></td>
<td>2017</td>
<td>392</td>
<td>4,433</td>
<td>4,825</td>
</tr>
<tr>
<td>Dec</td>
<td>2016</td>
<td>99</td>
<td>2,069</td>
<td>2,168</td>
</tr>
<tr>
<td></td>
<td>2017</td>
<td>691</td>
<td>6,291</td>
<td>6,982</td>
</tr>
</tbody>
</table>

Patient Volume Increase: 153%
Urgent Care Center Dashboard
Average Time by Phase of Visit & Checkin Count

Total Visits
104029

CheckinType
- Onsite
- Remote

Location
All

Appointment_Datetime

2016 2017 2018

Onsite (Avg time in mins)**
Total Wait plus Exam Time: 53 mins
Waiting Time: 23 mins
Exam Room Time: 30 mins

Remote (Avg time in mins)**
Total Remote plus Wait plus Exam Time: 91 mins
Remote Time: 44 mins
Waiting Time: 18 mins
Exam Room Time: 29 mins

*Average times exclude wait times where patient not moved in system from one phase of visit to another per standard operating procedures
Inspira Call Center Referral Insights

Compare to Definitive Healthcare Stats for Pain Management ~ 1%

- Pain Management 9%
- General Practice 22%
- Other 24%
- Otolaryngology or ENT 5%
- Orthopedics 7%
- OB/Gyn 7%
- Neurology 7%
- Gastroenterology 4%
- Urology 3%
- Pulmonary Diseases 8%
- Psychiatry 4%
Referral Average Travel Distance

- Otolaryngology or ENT
- Psychiatry
- Gastroenterology
- Pulmonary Diseases
- OB/Gyn
- Neurology
- Orthopedics
- Pain Management
- General Practice
Key Takeaways

• CRM is a key component of an ecosystem for healthcare consumer engagement
• Measure engagement to yield actionable insights and inform future engagement initiatives
• Take steps to resolve the Healthcare Consumer Paradox
Questions