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THE FUTURE OF PATIENT/ CUSTOMER EXPERIENCE (CX)

A Frost & Sullivan Virtual Think Tank

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Contents

INTRODUCTION

Frost & Sullivan recently invited a panel of industry leaders from the medical device field, software and technology, telehealth and interactive communications, as well as payors, to participate in a new and unique thought leadership forum, our Virtual Think Tank (VTT) series. The discussion focused on understanding the different strategies around improving the customer experience (CX) and the patient experience (PX)—from a more holistic perspective.
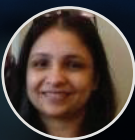
Moderator:

Greg Caressi
Global Business Unit Leader and Senior Vice President, Transformational Health
Frost & Sullivan

Jeff Anglin
Director of Customer Experience and Design
Medtronic

Pat Mallon
Healthcare Lead
TELUS International

Deepali Narula
VP of Patient Services
Conifer Health Solutions

Michael Spencer
Senior Director, Patient Access Operations and National Patient Access Strategic Initiatives
Conifer Health Solutions

Robert Gofourth
VP of Operational Strategy & Performance
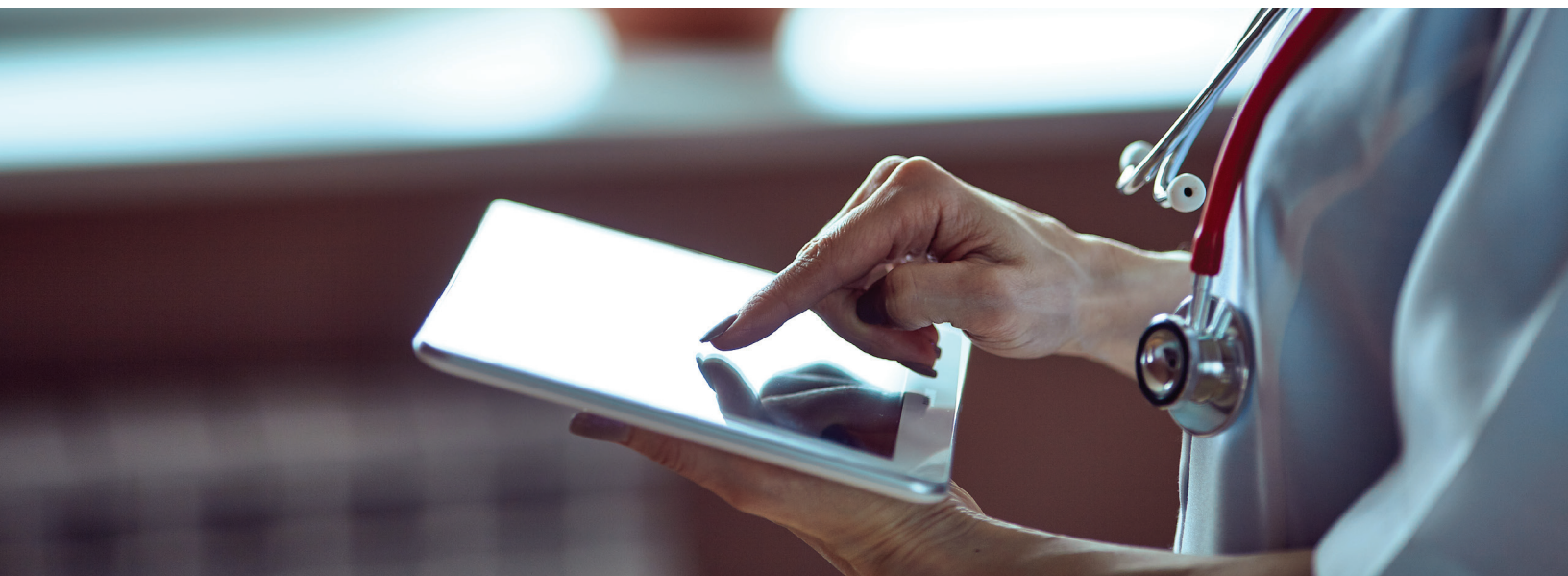*BlueCross BlueShield NC*

CHANGES IN PATIENT BEHAVIOR

Over the past year, there is increased demand from consumers to utilize consumer interaction tools that we see in other industries. Healthcare organizations are bringing in some of those tools to improve the customer experience, improve loyalty and customer satisfaction. Competitive positioning has caused organizations to review the customer experience across all aspects of healthcare delivery, whether it is clinical, administrative, or financial.

COVID-19 has brought a different paradigm to consumer interactions for both providers and payors. Interactions shifted to different platforms, and consumer expectations of remote interactions and self-service increased. At the same time, interactions have shifted dramatically from planned, scheduled encounters addressing medium to long term issues to a major focus on triage and emergency interactions.

As we have gone through an extended period of economic uncertainty, consumers have shown a need to be reassured that their care will not be interrupted. Specifically, patients who are reliant on certain supplies for managing their health wanted confirmation that they would continue to receive these items in a timely manner and at a price that was affordable to them.

Deepali Narula, VP of Patient Services at Conifer Health Solutions, said, "We had to adapt to changing conditions and patient expectations." At the onset of the COVID-19 pandemic, many providers had to cancel certain surgeries. Later in the year, as those surgeries were being rescheduled, we increased scheduling resources to ensure all the canceled patients were contacted. The new safety precautions, visitor restrictions, and other guidelines had to be discussed with patients, which contributes to increased patient anxiety associated with hospital visits. Delays in elective procedures and diagnostic testing raises concerns on the long-term impact on the general public health.

Supporting and connecting multi-channel communications has become an operational imperative. An inevitable, but organic, need for streamlined multi-channel communications arose to ease the healthcare staff's burden to perform these repetitive tasks of communicating the new guidelines and following up to evaluate health statuses.

Prior to the pandemic, telehealth had low uptake due to concerns about efficacy, reimbursement and security on the provider end, as well as general unfamiliarity with the technology on the consumer end. The drastic shift in adoption of virtual teleconsultations has opened up pathways to more innovative applications. Pat Mallon, Healthcare Lead at TELUS International, explains, "There's definitely more of a push to provide self-service, like using bots to answer basic 'how to' questions. I have seen some of the payors looking at ways to digitize around open enrollment."

> With the shift in focus to digital elements for patient and member use, various considerations have to be made. For example, allowing pre-registration to be done online reduces time spent at check-in. However, different age groups respond differently to various types of mobile devices, and the process has to be optimized for each of their comfort levels.

Personalization in communications means connecting with each individual in the mode they respond to best. Sometimes this means segmenting patients into digital or not.

The pandemic also shed light on the healthcare needs of patients without adequate means. With national unemployment rates skyrocketing to unprecedented numbers, healthcare organizations still had to maintain accessibility and reduce barriers to health services to reduce long-term adverse outcomes. Robert Gofourth, VP of Operational Strategy & Performance at BlueCross BlueShield NC, mentions various changes that were implemented with one goal in mind. He said, "We need them to be able to [still] get care."

CUSTOMERS VS PATIENTS

The evolution of healthcare access has driven patients and the industry to a more consumer-oriented mentality. Patients have a choice in the healthcare organizations they select for care. They can choose from a variety of payors and providers. This means that the quality of the consumer experience is key in customer retention. Customers are used to ease-of-access from the comfort of their homes with many other facets of their lives, from banking or ordering almost anything online. More and more, patients are expecting this experience with healthcare. Michael Spencer from Conifer Health Services explains, "[Given the current circumstances], we have to try to find alternative ways to connect with our patients and give them options to access healthcare in the way that they want now."

One thing that sets healthcare apart from other industries is that empathy and patient-centric care plays a major role, despite the business-like atmosphere that has seeped into it. Jeff Anglin, Director of Customer Experience and Design at Medtronic, states, "What many customers might not get from other entities, they need to get from us...our loyal customers are with us, not necessarily because of our technology or those things. They're with us because of our caring for them."

AUTOMATION

While digitizing the patient-provider relationship can result in a net-loss of human touch, the avenues created to reach the patient are increased and can add to the ease of use and the personalized communication experience. Patients can complete activities when convenient for them, can review content sent to them to consume at their own pace, etc. Patient-facing tools like self-scheduling, self-guided preregistration, guidance on preparing for an appointment or diagnostic procedure, communication of pre-operative instructions, for example, make repetitive tasks easier to track and complete.

> Instead of enforcing a one-size-fits-all approach to accessing healthcare, digital platforms allow for different segments of consumers to use whichever methods are most comfortable for them, reinforcing the goal of empathy.

Narula mentions, "We can send a text message inviting a patient to complete their pre-registration for an upcoming appointment. The patient can complete the process online at their own convenience, or we can still complete the pre-registration over the phone if they prefer."

Automation creates other opportunities outside of patient-facing tools that impact patient experience as well. Spencer explains, "Automation opportunities can bridge the divide that sometimes exists between provider and payor. Things like prior authorization automation is something that has been a hot topic for quite some time. This is a key priority for us." The pandemic has amplified and exposed some of the industry's pain points that required stakeholders to challenge the status quo and the traditional way things were being done.

The discussion around population segmentation needs to be delved into deeper. Certain demographics have specific needs and preferences regarding digital tools that they are more likely to be attracted to. Gofourth mentions, "But one thing that we have seen since COVID is a good, positive uptick in mental health services in the Latino community." This indicates that the need has always existed, and the current circumstances have allowed the focus and capability to fulfill this need in a more private way, via teleconsultations. A closer look needs to be taken at the reasons behind lower adoption rates for digital channels by minority demographic communities. This is possibly due to a lack of translation services, education levels, and comfort with how the digital tools are being presented.

DATA AND ANALYTICS

Narula perfectly explains the challenge of extracting patient experience insights from healthcare data. She said, "We literally need to connect various data types from different sources and ask 'how do we link it back to the experience?' It's a bit challenging on the healthcare side, because of the way the raw data is extracted. There are five different sources, and we leverage advanced business intelligence tools to reformat and drive insights."

The fragmented way digital applications evolved in healthcare create this challenge of uniting the data. It has created large gaps to fill in terms of data integration and analytics. Layered with the heightened sensitivity of the information present in healthcare, the challenge becomes even more difficult. In some cases, the data is present and it is being collected, but producing actionable insights from it is still subject to various regulatory obstacles that exist. Anglin explains, "I'll tell you that the biggest thing for us is really around consent and being able to use that data. The rules for consent and reaching out to customers through privacy and PHI is becoming a hurdle and a dynamic one that keeps changing."

CONCLUSION

Recent events have accelerated the trend of improving communications and interactions in healthcare through personalization. With consumer expectations of a customer experience in healthcare that more closely replicates their experience with other industries, the bar has been raised to bring more multi-modal tools to patient and member interactions. Technology partners who have experience in leveraging these communication tools with consumers and who have healthcare industry experience are needed partners to improve the customer experience.

> The capability to fine-tune data aggregation and analytics are the definite next step in improving the quality of the patient experience. The more individualized and personalized the data insights can be, the more likely these consumers will view their patient experience in a positive light.

Having the technology tools and data insight will improve the competitiveness of healthcare organizations. Working with partners who are experienced in multi-modal communications in patient and member interactions will enable healthcare organizations to increase efficiency, create consumer convenience, improve communications and maintain empathy, improving the existing processes and creating innovative ones.

NEXT STEPS

› **Schedule a meeting with our global team** to experience our thought leadership and to integrate your ideas, opportunities and challenges into the discussion.

› Interested in learning more about the topics covered in this white paper? Call us at 877.GoFrost and reference the paper you're interested in. We'll have an analyst get in touch with you.

› Visit our **Digital Transformation** web page.

› Attend one of our **Growth Innovation & Leadership (GIL)** events to unearth hidden growth opportunities.

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