# Member Spotlight: How Texas Health Resources Built Infrastructure for Better Patient Engagement

Customer Relationship Management (CRM) systems are not new to healthcare, but the demand for greater patient-centricity, heightened competition from disruptors, and the continued impact of digital transformation have pushed health systems to rethink the utility of CRM to personalize how health systems communicate with patients and consumers. In this member spotlight, Texas Health Resources share how they implemented and use their CRM to generate data informed marketing and communication to improve patient engagement and care experience.

## Building an Enterprise-Wide CRM Strategy

- Texas Health Resources recognized the need for a more cohesive infrastructure for patient communication and initiated an enterprise-wide shift to CRM.
- Having a CRM at an enterprise level creates a single source of truth on patient preferences and enables organizational alignment on consumer centric initiatives. To get to that point, the following structures were established:
    - **Governance:** The CRM is governed through a cross-functional team with stakeholders from operations, strategy, and marketing to drive CRM strategy and use case prioritization.
    - **Ownership:** The CRM is managed and utilized by the CRM marketing team, the marketing strategy team, and the data and analytics team.
    - **Change Management:** To ensure employees would understand why a CRM is necessary and how to use it, upskilling and broader organizational messaging on CRM's capabilities were provided.
- By rebuilding their CRM system under their broader Consumer 360 initiative, they aimed to establish a unified view of patients and prospects across all touchpoints.
    - Specifically, the CRM's automated dashboard tracks patient engagement metrics like encounters, (email) open rates, and medication refill compliancy, among others.
    - This data is readily accessible to all organizational members to foster transparency and enable data informed decision-making on specific service lines and partner services.

> **Implementation Lessons Learned**
>
> - *Prioritize data analysis and identity management*. Effective implementation of an enterprise-wide CRM requires cross-functional team collaboration, and a robust organizational governance structure.
>
> - *Maintain a realistic perspective on the timeline for progress*, exercising caution towards vendors promising swift solutions. Emphasizing quality over speed or cost remains central to successful implementation endeavors.

## Customization via Patient Propensity Models

- CRM infrastructure is also critical for health systems to improve the patient care experience. By leveraging the information CRMs have on patients' care experiences, health systems can more easily close gaps in care, improve care management, and better guide patients through their care experience.
- To better gauge patients' preferences and care needs, Texas Health had their analytics team develop custom propensity models, which triggers specific messages to be sent to patients based on the propensity (which is scored on a scale 1-10) of that person needing a certain message. Specific examples include:
    - Primary care patients with high-risk chronic conditions getting dedicated outreach about their medication adherence.
    - Patients who receive a new diagnosis, a referral, or need to schedule a follow up appointment will get specific outreach nudging them to fulfill the next step in their care journey.
- Through the propensity models, Texas Health can send patients targeted messaging that help them better adhere to their care plan and navigate their care within the health system.

# Program Components

## CRM Use Cases

Clinical care gap closure

Insurance plan-specific communication

Care navigation and referral management

Patient lead marketing

## Patient Engagement Initiatives

### Welcome Series Journey
- Texas Health obtains email addresses from patients and consumers from a variety of sources. Whenever a unique, new email address comes into the system, a "Welcome Series" email journey is triggered. The 4-part series welcomes viewer to Texas Health and highlights a variety of services including physician finder, Breeze Urgent Care locations and the blog.

### New Movers Program
- The New Movers Program is designed to generate qualified leads by welcoming residents new to the area and providing an overview of Texas Health. Updated in 2022, the direct mail is printed "in-line" allowing for personalized content and quick changes. A personalized QR code directs recipients to a pre-populated online form where they can subscribe to various health topics and opt in to the monthly e-newsletter.
    - o Personalized to the recipient
    - o Includes map showing nearby Texas Health facilities
    - o Displays Breeze Urgent Care content if a location is near the recipient's address; default content if not

### Healthy E-News
- Emailed monthly and features timely and relevant blog articles. The e-newsletter is typically personalized, segmenting audiences based on gender. Subject lines are A/B tested and send-time optimization is leveraged to predict and send emails on the day and time most likely to be opened.

## Key Program Outcomes

**23%**
Increase in med refill adherence for patients with chronic conditions

**30-40%**
General open rates, compared to 6-8% before expanded CRM implementation

**62%**
Healthy E-News[1] open rate

**55%**
Welcome Series Journey[2] open rate

**27,238**
Distinct patient encounters from New Movers Program[3]

**$31.1M**
Net revenue from New Movers Program[3]

**0.13%**
General unsubscribe rate

## Future Plans

- Incorporating AI in broader patient communication strategy
- Building pathways that drive better communication with consumers who aren't patients yet
- Building out a Customer Data Platform to help store and maintain data.

Footnotes:
1. Healthy E-News: Personalized wellness e-newsletter consumers can subscribe to.
2. Welcome Series Journey: Whenever a new email address enters the system, an email journey is triggered, welcoming user and highlighting a variety of services.
3. New Movers Program: Generates qualified leads by welcoming residents new to the area and providing an overview of Texas Health.