CX MASTERY FOR HEALTHCARE

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WHETHER YOU ARE A MANUFACTURER SELLING INTO THE HEALTHCARE INDUSTRY OR A DOCTOR'S OFFICE SERVING PATIENTS, YOU MANAGE RELATIONSHIPS. CUSTOMERS. PATIENTS. VENDORS. DISTRIBUTORS.

That's a lot of relationships that can fall through the cracks if you don't have the right tools in place. Manufacturers and distributors work to ensure healthcare facilities are in stock of all the critical machinery and supplies they need. Healthcare providers and medical professionals continue to adapt new safety procedures, capacity issues, and telemedicine options.

While the term "Customer Experience" is used more prevalently in consumer brands, it's just as important in any and all industries. As consumers increasingly have more personalized experiences with those consumer brands, they will in turn want that level of experience everywhere. Focusing on CX is a powerful way to enable healthcare providers and patients alike to get the most from their relationships within the medical community.

Yet, as the healthcare industry moves toward an increasingly personalized model of patient care, the technology used isn't always up to the task. Many providers and suppliers are relying on outdated technologies and get lost in the sea of data, which is not good for healthcare professionals or the patients they serve.

Thankfully, this tradition is changing. These outdated systems are being increasingly replaced by customer relationship management (CRM) or CX software. While these systems were originally designed to help salespeople and marketers build stronger relationships with their customers, their capabilities extend much farther. For healthcare, there's now a new variation of CRM technology designed with patients (rather than customers) in mind.

These CRMs can simultaneously help healthcare providers manage the daily needs of any healthcare office and dramatically improve the patient experience. They can also ensure that providers selling into the healthcare industry have the proper level of compliance needed.

To understand why CX for healthcare is so effective at improving both the provider and patient experiences, it's important to understand the core benefits of the technology.

In this super report, we are going to take a look at not only how CX technology can help improve traditional data management systems in healthcare settings, but also how we can do so while still protecting patient data.

THINK OF THE PATIENT EXPERIENCE AS THE CUSTOMER EXPERIENCE

One of the most surprising results of the modernization of our healthcare industry is the unexpectedly positive impact of systems that support and enhance personalized care. These solutions open up a new range of possibilities for healthcare providers. From personalized preventative care to cost-reducing management tools, these systems have the potential to create a more patient-focused healthcare experience.

At the core of this revolution in healthcare technology is patient experience. If that term sounds familiar, that's because it's an industry-specific adaptation for customer experience.

While there are major differences — particularly in the ethical and legal requirements — between patients and customers, both can benefit from the same underlying technology and techniques.

The ultimate goal of any patient experience upgrade should be on delivering and supporting the highest possible level of patient care. Yet, it can be a challenge to deliver the best care when medical professionals are juggling multiple patients, trying to communicate quickly between each other, and also adhering to strict HIPAA guidelines.

Does This Sound Familiar?

It's no secret that COVID-19 sped up technology use across all industries, but especially healthcare. First responders and medical personnel had to adapt quickly to evolving best practices to keep patients as healthy and happy as possible. While some people may think this just means wearing PPE, proper precautions extend far beyond that.

Instead of bringing in a desktop on wheels to register patient data during intake and appointments, there are now tablets. But what happens if the software at a hospital or medical facility is not tablet or mobile friendly? It can be a bigger challenge for nurses and doctors to input information if the application is not user friendly, which can decrease the patient experience if the process time is doubled.

Time is of the essence for many patients. They want to feel heard and respected and to understand their results and plans as fast as possible. Yet, their medical team needs to also adhere to HIPAA policies, making sure patients' data is safe.

Example Scenario

A nurse has received lab results back for Patient A and wants to confirm with the doctor on the action plan. In the past, the nurse may have sent a quick text to the doctor with the lab results. The doctor could read them and respond. However, if these conversations are on personal cell phones without a way to encrypt data, the medical professionals could be putting patient data in danger. Even though they had the best of intentions to treat the patient efficiently, creating a positive patient experience, this scenario could cause issues.

If we think of this example more like a traditional sales environment, we would dissect how the nurses and doctors could quickly deliver information safely back and forth and update patient files.

Let's take a look at how else the healthcare industry can embrace customer experience techniques for the patience experience.

Focus on Engagement

In a traditional business context, engagement represents a customer's willingness to actively participate in the role of prospect or customer. It measures how likely they are to respond to emails and sales calls, among other things. In a healthcare context, however, engagement represents something far more important: The patient's willingness to actively participate in their own wellbeing.

If the extent of your engagement strategy is sending out automated appointment reminders, there's definitely room for improvement. With modern marketing automation tools, for example, your office has a wide range of opportunities to connect with your patients.

This could take the form of an occasional email or text message to patients who haven't visited your office recently, information about new or improved treatments, or follow-up communications and reminders to patients who have recently undergone a procedure.

These communications can also be two-way conversations. They are managed by a CX or helpdesk system, allowing your staff to check-in on patients more regularly, efficiently and proactively. These conversations can do more than simply streamline your patient communication. They can also improve overall levels of patient contact and interaction.

A patient who has a quick question about a prescription may not want to call your office and wait on hold for 15 minutes before getting a simple answer. Or worse, wait for 15 minutes to only be told someone will call them back. This kind of interaction has a decidedly negative impact on engagement. But if they can log into a patient portal or open an app, message the doctor directly, and get a direct response from a doctor or nurse during a moment of relative downtime, everyone wins.

Optimize the Technology

Every healthcare practice is unique. While there are some similarities like reception desks and exam rooms, the day-to-day operations and workflows can be completely different. This is even true within the same medical specialty. It's essential that you customize your technology with your customers in mind. This way you create the best experience for your patients.

A customized workflow often starts with simple integrations, especially for patient portals. With an integrated portal, patients can:

- **Schedule appointments**
- **Update contact information**
- **Securely access test results**
- **Manage payments**
- **Message the doctor**
- **Access information about prescriptions and treatments**
- **Request follow-up**

There is no longer the need for them to call in for every single need. This approach to care can have a profound impact on the patient experience. However, optimizing technology goes beyond just partner portals. Consider the advantages of a patient-facing mobile app with built-in options for video-chat consultations. When all of these systems are integrated with existing technology the result is often a more cost-efficient form of healthcare that also improves the patient experience.

Also, when adding in these video consultations, you are expanding your reach. Previously it had been challenging for rural communities to have access to specialty doctors. They had to drive hours to see them. Adding in video consultations and follow up emails into the mix allows doctors to have a wider radius of patients. People who may have not wanted to drive hours for a doctor's appointment can have a much smoother experience now. They may even schedule appointments more proactively.

Track Your Patient Metrics

Without the right technology, it can be difficult to accurately determine your patient outcomes. How do you tell if you have satisfied patients? Or find a list of up-to-date patients? It's not always easy. If there's a problem with your practice's operations, resulting in those patients going elsewhere for care, you might not even notice it until you've lost a large portion of them to other providers.

Most healthcare providers aren't trained in looking at their practice from this point of view. It's about providing care, after all, not maximizing conversions while reducing churn. But the healthcare industry is still a business. It can be helpful to look at the practice from a business point of view. The end goal is to take the best care of your patients, so without proper data of how you can improve, you may be missing valuable information.

Losing customers — or patients, in this case — is extremely common in a typical sales environment. One of the biggest causes is a problem with the customer experience. Tools like CX software exist specifically to help companies identify and remedy these issues. Without these tools, office managers and doctors are often forced to make educated guesses about the business value of treatments and procedures.

In many cases, tracking these key metrics doesn't even require a major investment. Your CX or other patient data-management tools can gain that functionality through simple plugins. KPI dashboards and CX-driven reports can also provide new insights into the overlap between the patient experience and the practical business needs of the provider. When both these needs converge, the result is a thriving practice filled with satisfied patients.

PATIENT IMPACT

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TRULY PERSONALIZED PATIENT CARE

Electronic Health Record (EHR) software has completely transformed the healthcare industry, which allows clinical records to be easily shared between medical providers. EHR systems allow doctors to instantly access vital patient information (such as immunization histories, allergies, and detailed medical histories). But these systems also have limitations, as they were never designed to provide truly comprehensive and personalized patient data.

In this respect, CRMs can act as a supplemental resource to EHR platforms, which can provide healthcare professionals with even greater patient insights. Patient data that might not be suitable for EHR systems (such as non-medical family details, lifestyle information, and even notes about a patient's work and hobbies) can now be more accessible, which allows for even more personalized care.

Improved Scheduling and Communication

Providing great medical care is often a double-edged sword. While it can be the easy part of the job for many healthcare professionals, it's also complex and tedious administrative work that most of these workers dread. All those seemingly simple, routine tasks (such as scheduling follow-up appointments, making referrals to specialists, and updating patients about their test results) drain time away from providing a high-quality patient experience.

Interestingly, these problems are exactly what CRM software was designed to solve. The same marketing-and-sales automation tools that allow sales teams to thrive in their communication-driven industry can be readily adapted to the healthcare field. Not only does this advantage increase overall office efficiency, it also provides much-needed analytics and insights for office managers looking to optimize operations.

Reduced Administrative Errors

Most healthcare providers rely on multiple software tools to manage their scheduling, patient communication, and other administrative needs. The less integrated these systems are, the more prone to human error they become. This trend can easily result in mixed-up appointment times, missed patient communications, and bills that are sent to the wrong addresses.

Left unchecked, these administrative errors can have a deeply negative impact on the patient experience. By uniting these various systems and workflows in a centralized CRM solution, these routine administrative activities can now be handled through a single platform. So, there's less human error and less time spent fixing clerical mistakes. The result? Happier patients and a more efficient office.

Better Access to Resources for Patients and Caregivers

Being sick is scary, particularly for people with chronic conditions. When these patients (or their caregivers) have questions or concerns, it's only natural for them to reach out to their healthcare providers for help. Unfortunately, these clinics and offices aren't always set up to provide this kind of assistance in a timely and efficient manner.

As a result, patients and their caregivers can needlessly spend hours on the phone—or even in the waiting room—just to get an answer to a simple question. This scenario is another example of how CRM technology (in this case, customer support tools) can dramatically improve the patient experience. It's entirely possible to provide a "help desk" experience for patient questions and offer educational materials (such as videos or online pamphlets) by using a CRM.

Patients can even use CRM-provided patient portals for secure email messaging for non-urgent questions. Many of these CRM tools are also available as mobile apps, which makes it that much easier for patients to access these resources.

Greater Patient Engagement

In the hectic daily reality of healthcare, it's not always possible to give a patient the focus and attention he or she deserves. It's difficult for healthcare workers to remember every detail of a patient's chart. However, it's all too easy for patients to misunderstand this situation, which could result in them feeling like healthcare providers can't be bothered to remember basic details about their lives. Unsurprisingly, this misunderstanding can have a very negative impact on the patient experience.

Fortunately, CRM software was designed to solve this kind of problem, too. After all, salespeople also have dozens of conversations every day, and it really helps to have a system that will manage those relationships. The CRM can function as a central database for all that information in a concise way, which allows the user to instantly get up-to-speed on the essential details of anyone in the system. So, it's not hard to see the value of a tool like CRM in a healthcare setting. In fact, it allows doctors, nurses, and other staff members to create more engaging—and more fundamentally human—interactions with their patients.

TELEHEALTH IMPROVES PATIENT SATISFACTION

Now more than ever, we've learned that technology is our friend. As we all had to adapt in different ways to the COVID-19 pandemic, tech allowed us to stay connected to our loved ones and colleagues alike.

The medical community had to tackle very challenging aspects of the pandemic. Not only did they face COVID-19 head on, they also had to still find the ways to treat every other illness and issue that exists.

Here's an example: The existence of COVID-19 did not stop all other reasons people see doctors. There are an array of other illnesses and conditions that could cause you to need to see a doctor, nurse, or therapist. Accessibility to these medical professionals is important.

Maybe your child has an ear infection. Or you're an anxiety sufferer, and you need to speak to your therapist. Or you just need to follow up with your primary care physician about a new medication.

Whether it's because of the global pandemic, regular flu season, or you're not able to drive yourself to a doctor's appointment, you don't want to (or can't) get into the doctor's office. Yet, you still need medical treatment. So, what's the solution?

Many doctors and healthcare professionals are turning to telehealth options. So how is technology able to provide patients with the same (or better) service than an in-person visit?

Telehealth Limits Exposure

With telehealth options, many people can be treated for what ails them from the comfort and safety of their own homes. In fact, one major health system reported during the COVID-19 pandemic that 61 percent of patients who used virtual urgent care would have previously gone to a brick-and-mortar urgent care facility, and 14 percent would have gone to an emergency room. So, 75 percent of these people prevented being exposed to COVID-19 by staying home and accessing the healthcare they needed via telehealth.

Telehealth Provides Greater Access

No matter where you live, you can get the best care available. Before telehealth, if you lived in a more rural area, you might have to travel a long distance to get to a hospital, let alone see a world-renowned doctor. But with telehealth options, more people can tap into expert resources for their health issues.

Data Systems Streamline Care

If you're a telehealth provider, you need a centralized information system, such as CRM software, at the center of your patient data. With CRM, your records are up-to-date with each patient's medications and other details. It does not matter where and how each patient is being treated in your healthcare system. You can also quickly reference every conversation you have with the patient and set reminders for follow-up appointments.

While there is so much good telemedicine brings, there are some negatives to counteract. The healthcare industry's adoption of telemedicine technology has been one of the brightest silver linings to emerge from the dark storm clouds of the COVID-19 pandemic. The medical industry has been experimenting with telehealth for decades, but the COVID-19 forced healthcare providers to embrace remote-care options. In addition to the obvious logistical challenges of providing high-quality healthcare via the internet, providers are now facing a new kind of danger: Cybercriminals.

WHAT IT CAN MEAN FOR PROVIDERS

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DOCTORS WORK WITH PATIENTS, THAT'S OBVIOUS. YET, THEY HAVE MANY MORE RELATIONSHIPS THEY WORK WITH EVERY DAY.

A general practitioner's office needs supplies ranging from blood pressure machines to medical gowns to cleaning supplies to medicine and everywhere in between. If a blood pressure machine breaks or the office runs out of medical gowns, there is great disruption to the day: service cannot be provided or not to the level patients expect.

Doctors and other medical professionals rely on their suppliers, distributors, and manufacturers to be able to handle their orders efficiently.

Better Order Management Practices

Too many times, when people think about healthcare, they lean into their thinking about being a patient, their personal experiences with the healthcare industry. While all the above factors show how technology can improve the patient experience, it can also improve the experience of the healthcare provider within its network.

For example, online ordering for materials, tracking where shipments are and a better understanding of arrival times and communication are all a part of CX.

Compliance Visibility

Any software or supplier that would have access to private information needs to observe HIPAA requirements. Utilizing technology means an organization can properly adhere to the security, privacy, and breach requirements when working within healthcare.

For instance, a HIPAA compliant CRM software platform needs to be managed by a partner that is also subject to HIPAA compliance for Business Associates. Data Compliance is a road, not a destination, and there are businesses who focus on CRM for healthcare, such as Faye, that work for companies to use the capabilities of technology, while adhering to the ever-changing compliance landscape.

Putting CX of the forefront has great benefits for providers and patients, but how does a company actually achieve them?

CX STRATEGY FOR HEALTHCARE

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BY DEVELOPING A STRONG CX STRATEGY, HEALTHCARE COMPANIES CAN MEET–OR EVEN EXCEED–CUSTOMER EXPECTATIONS.

If the business is a hospital or healthcare provider, they simply need to think of their patients as their customers. They can rapidly adapt and refine products based on customer feedback, supply chain changes, and even IoT usage data.

Healthcare businesses can even use their CX strategy to drive prospecting and sales, increase conversion rates, boost product ratings, and improve customer retention.

To understand how a CX strategy can deliver results in healthcare, it helps to split the customer experience into three core elements:

Culture

What is it like to be a customer/patient working with your company? How easy is it to order products, provide product feedback, or learn more about your products? How difficult is it to resolve product or ordering issues?

Process

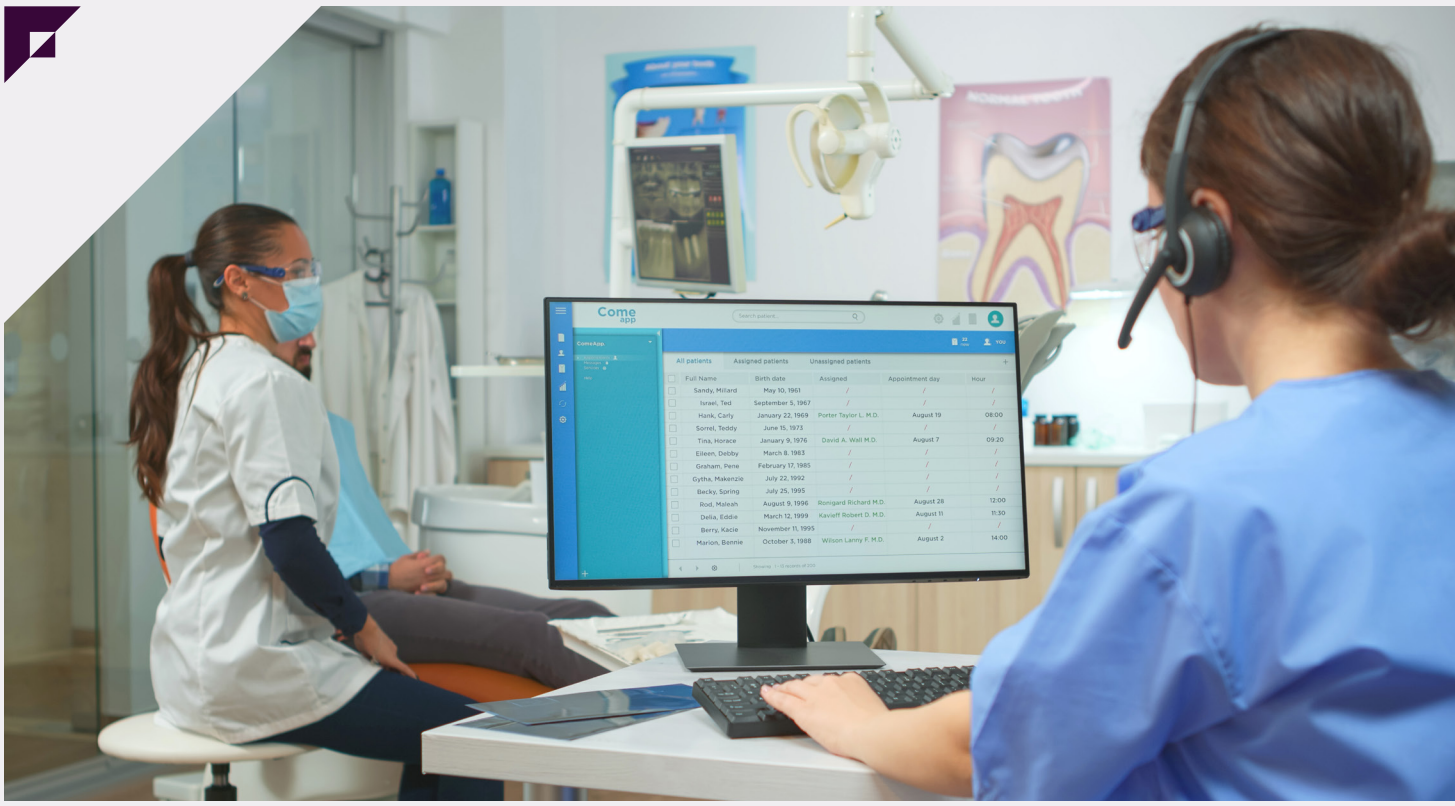
How does your company use customer/patient data? How much of a role does customer and IoT data play in decision making? Is critical decision-driving data readily available, or is it hidden away in data silos?

Technology

Is your company's technology optimized to streamline processes? Is it compliant? Does your technology make it easier to be a customer/patient? Does it provide meaningful insights for product design, order management, customer satisfaction, marketing, and sales? Is there an ongoing investment in new technology?

All three of these elements play a role in developing a strong CX strategy. The most obvious connection between them is the customer journey. By examining the company culture, it's possible to identify underlying problems in customer/patient acquisition, satisfaction, and retention.

When a company addresses disconnects and gaps in process, it can reclaim extremely valuable insights into customer/patient frustrations, expectations, and purchasing priorities. By investing in technology improvements, the company can substantially streamline operations, remove barriers to entry, and develop better products based on actual customer needs.



CX STRATEGY BENEFITS

These CX strategy improvements benefit more than just the customer or patient. A well-designed and implemented CX strategy can also yield serious benefits for distribution partners, retailers, suppliers, and even internal teams. The benefits are felt throughout the entire business network, including the end customers.

This approach to CX strategy can also provide a greater degree of flexibility and freedom for healthcare companies. By updating your approach to the customer journey, it becomes less daunting to develop targeted plans to improve customer/patient acquisition, build strong cross-channel marketing, or improve social media and online visibility. Your company no longer needs to rely on retailers and partners to provide your company with customer insights and product feedback. You now gather that information as a direct result of a comprehensive CX strategy.

It's true: no two companies are the same. CX strategies need to be crafted individually, focusing on what works for their market and customers.

However, there are some general concepts that apply broadly to every CX strategy.

Keep the Focus on Customer/ Patient

Today's customers have higher expectations, and retention of these customers is becoming more of a challenge. What always worked in the past may not work anymore. An effective CX strategy helps you keep your customers. How? Because it easier to become a customer, and stay a customer. It establishes a strong relationship between the provider and patient (or supplier and provider), allowing patients to provide feedback that improves their experience and interactions with the care team. Feeling like they have a say in their needs and medical care can go a long way to stay with a provider.

Create Data-Driven Strategy

Make use of what you learn. Use this as an opportunity to liberate your data from department-level silos in customer service, sales, product development, and marketing. Use that data to inform your planning, and to gain a clearer understanding of customer/patient needs. Do your patients like to get yearly reminders of needing a physical? Do they like general healthy living best practices information? How often do they want to receive it? And how? Integrate those insights into other parts of the business, like your product development, online customer experience, and even marketing.

Optimization is Where CX Strategies Shine

It's important to remember that implementing a CX strategy isn't a one-time thing. It's an ongoing process of optimization that involves every step of the customer journey. Progress needs to be measured, scoured for new insights, and then used to inform further strategy and planning. It's something that deserves a dedicated line item in your budget, and constantly revisited with ROI in mind.

Establish Clear Goals

To be effective, a strategy needs to be focused on achieving a specific outcome. In the case of CX strategies, the structure should be arranged with a clearly defined goal in mind. A CX strategy for customer retention will have a different set of priorities than one aimed at acquisition. Establish a methodology for measuring progress, and be willing to adjust and refine those methods over time to progress toward your goals.

With the right CX strategy in place, healthcare companies become more resilient to the ever-changing nature of the business. Data-driven decision making allows for better planning, and avoiding needless risks. Improving the customer experience makes it possible to improve every aspect of the customer relationship, from loyalty to part or product ratings. By streamlining operations with CX in mind, manufacturers can even become more agile, responsive, and competitive.

Invest in the Right Technology

Improving the customer experience starts with the ability to measure and analyze data from every corner of your business.

On the next page are the suggested technologies that can help a company master CX in healthcare.

TECHNOLOGY STACK FOR CX IN HEALTHCARE

No matter which part of the industry you are in, there's one constant: technology is a driving factor in the success of the healthcare industry. It's how patients are engaging with their providers. It's how those providers are then interacting with their suppliers.

Here are just some ways that patients are utilizing technology:

- **Assess test results and health records**
- **Schedule appointments**
- **Receive virtual care**
- **Pay bills**
- **Communicate with doctors**

Companies selling into the industry can:

- **Have an eCommerce platform**
- **Manage orders**
- **Create omnichannel support**

On the next page are some of the most common technologies used for CX in healthcare:

CRM

First things first, healthcare analytics affects all parts of the healthcare system and can dramatically improve both patient and customer satisfaction in two key areas:

1. Operational efficiency
2. Decision making

Healthcare organizations face many challenges linked with the customer management system (CMS). They comprise hundreds of workflows, including admissions, medication, and other documentation. If any of the workflows breaks down, it leads to delays throughout the system and creates a negative impact on customer experience.

Healthcare analytics help with workflow challenges by forecasting emerging resource needs in real-time, adjusting patient, and physician schedules. Analytics can lower costs, wait time, and improve the overall experience.

Analytics enable personalized care and accelerated diagnoses by data-driven systems. The physician can optimize complex situations in which a patient is suffering from multiple illnesses, by alerting doctors about the procedures and symptoms that might trigger others to worsen.

Healthcare organizations must have a way of aggregating disparate data sources to get a holistic patient view while combining historical trends and predictive analytics to uncover future potential risks to both the patient and the organization. To do this well, customer relationship managers must provide access to real-time data and insights that enable employees to act, not analyze.

Chatbots and AI-based Customer Service

Artificial intelligence and chatbots are often used on websites to help answer questions to customers. Chatbots can be quite intuitive and can engage without the need to engage with a call center. AI Chatbots support day to day operations. Customers can save time by conversing with a chatbot about appointments, updates, medical insurance information, or facilitate general trouble shooting. etc.

Electronic Health Records (EHRs)

AI-assisted data analysis has been widely used for patient electronic health records (EHRs). In the past, hospitals had a manual information system that was clumsy in their ability to share and transfer patient information. With EHRs, many systems have been connected, allowing faster and more integrated information sharing. These AI-based analyses help filter, organize, and search for information from multiple sources and give healthcare providers information to make quick and informed decisions.

Marketing Automation

Healthcare organizations need to expand their view of patients to start treating them like customers. Customers must navigate a complex ecosystem of players throughout their journey. A highly relevant engagement approach versus traditional methods will retain and keep new customers through long-term care and wellness moments.

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At Faye, we love software. We eat it, breathe it, and build it. Our mission is to make the best software in the world even better by helping clients lead the way with software strategy, deployments, integrations and technical support.

With us is better than without us. As an Inc. 5000 award winner eight years in a row, we help mid-market and enterprise clients globally achieve up to 10x productivity returns by leveraging the hidden potential within Zendesk, SugarCRM, Salesforce, HubSpot, and more.

There is no ceiling to what we can achieve with a lot of caffeine and an uncompromising commitment to make software better. We are intensely passionate about eating your software complexity and challenges, so that you don't have to.

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