



# CRM in Healthcare: the path forward for engagement

Dave Johnson, VP, Inspira Health Network, Innovations Center

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



# Guiding Principle

# Pressing need

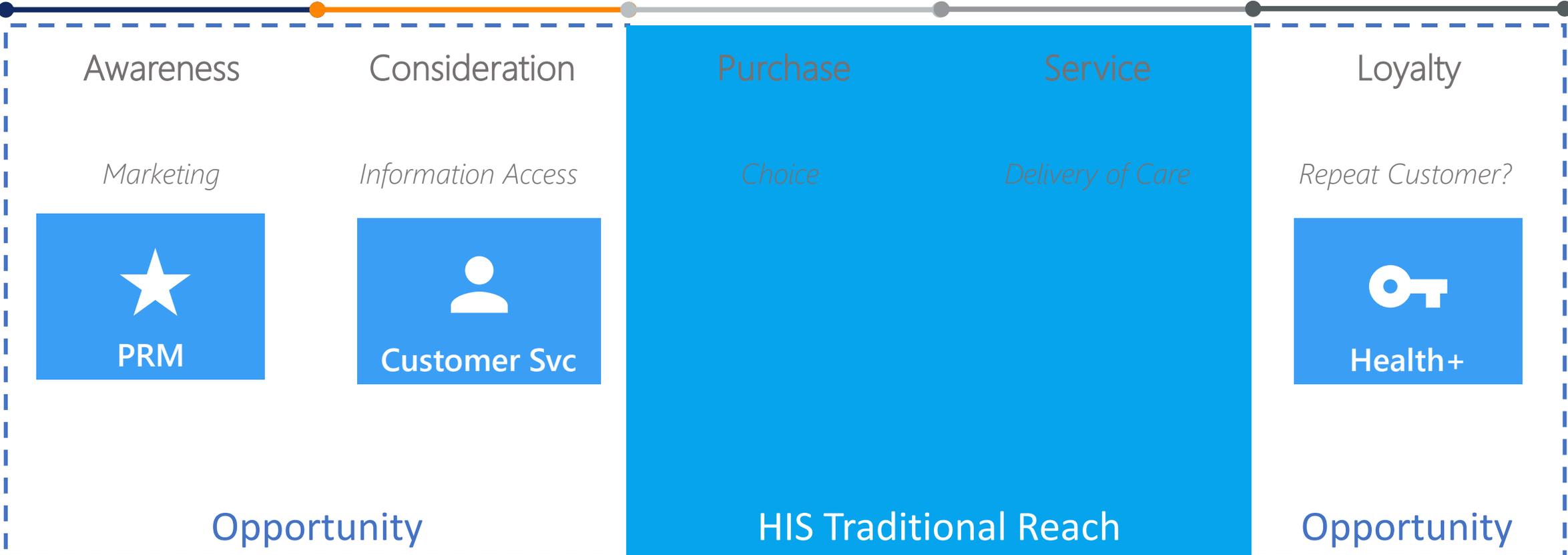
In-source customer service function branded as  
Healthcare Concierge – 1-800-INSPIRA

*Own every touchpoint with the consumer*



# The Case for CRM

# Health Consumer Journey



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



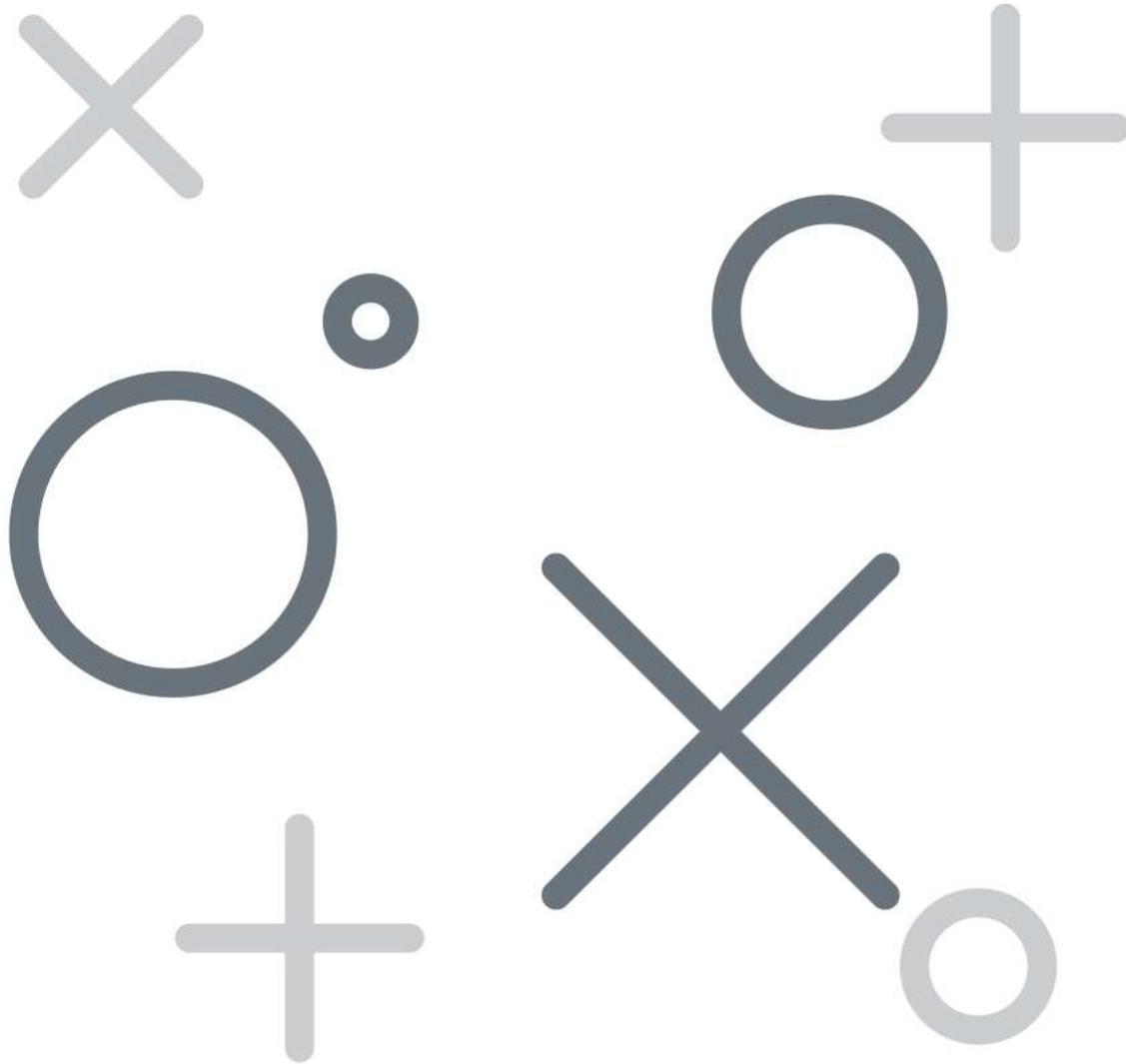
# Development of Approach

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?

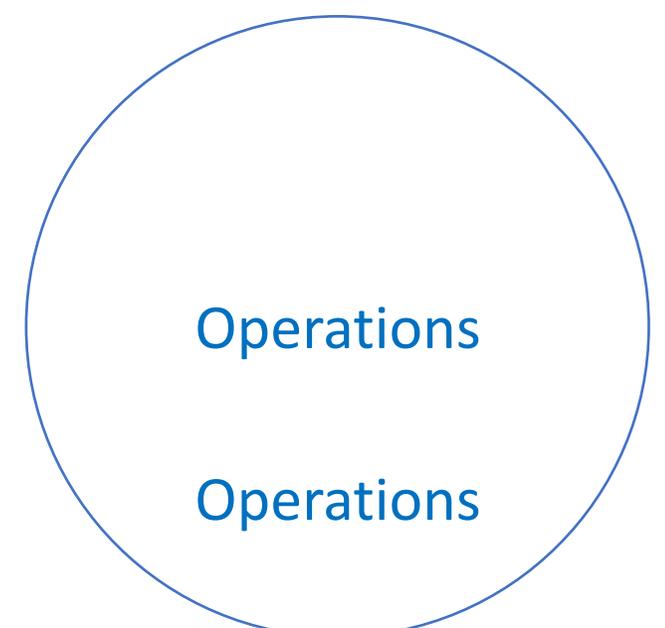
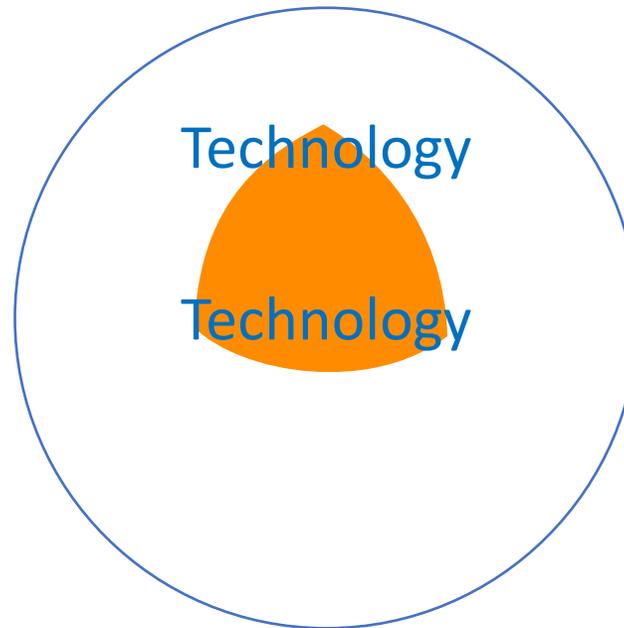
Can user engagement with their platform be instrumented? How else will we measure **ROI and solution efficacy**?

# Deeper Collaboration with Marketing and Operations

What can and should set us apart from our competitors?

How does consumerization and engagement contribute to marketing?

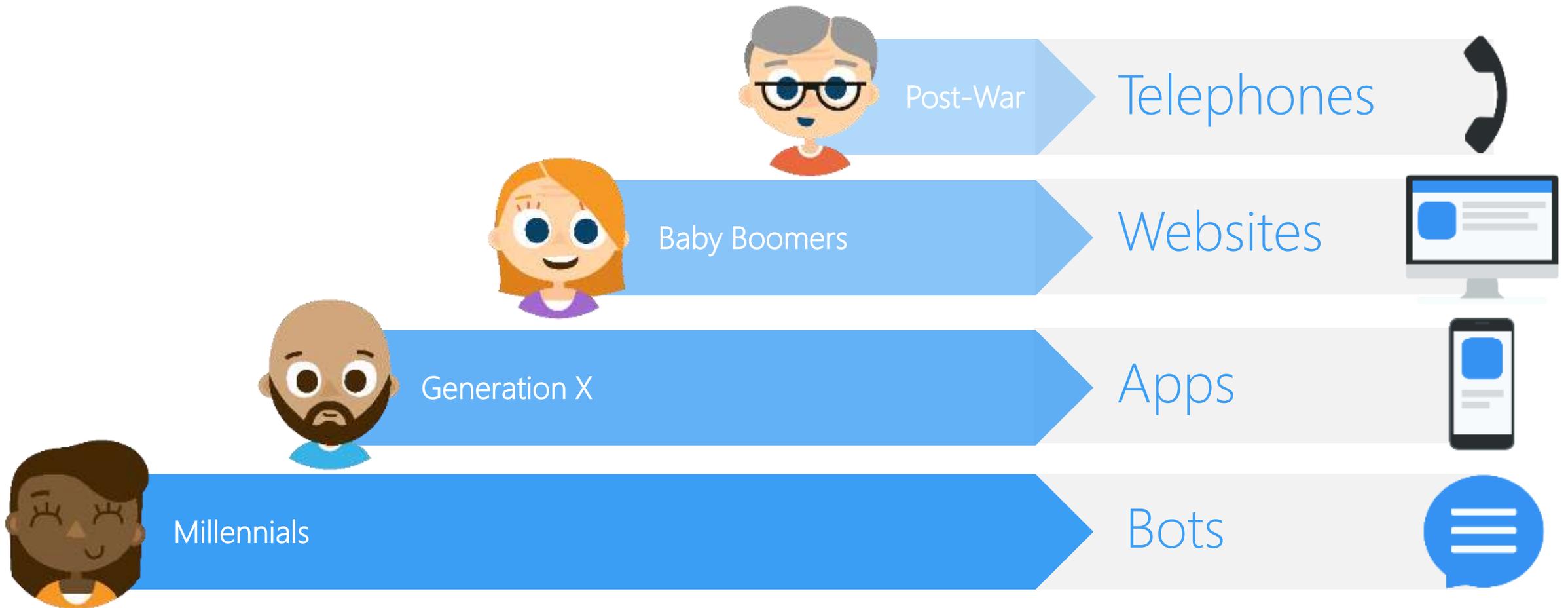
How does innovative engagement technology intersect with operations?



# Multi-channel Engagement

Options to engage across all demographics

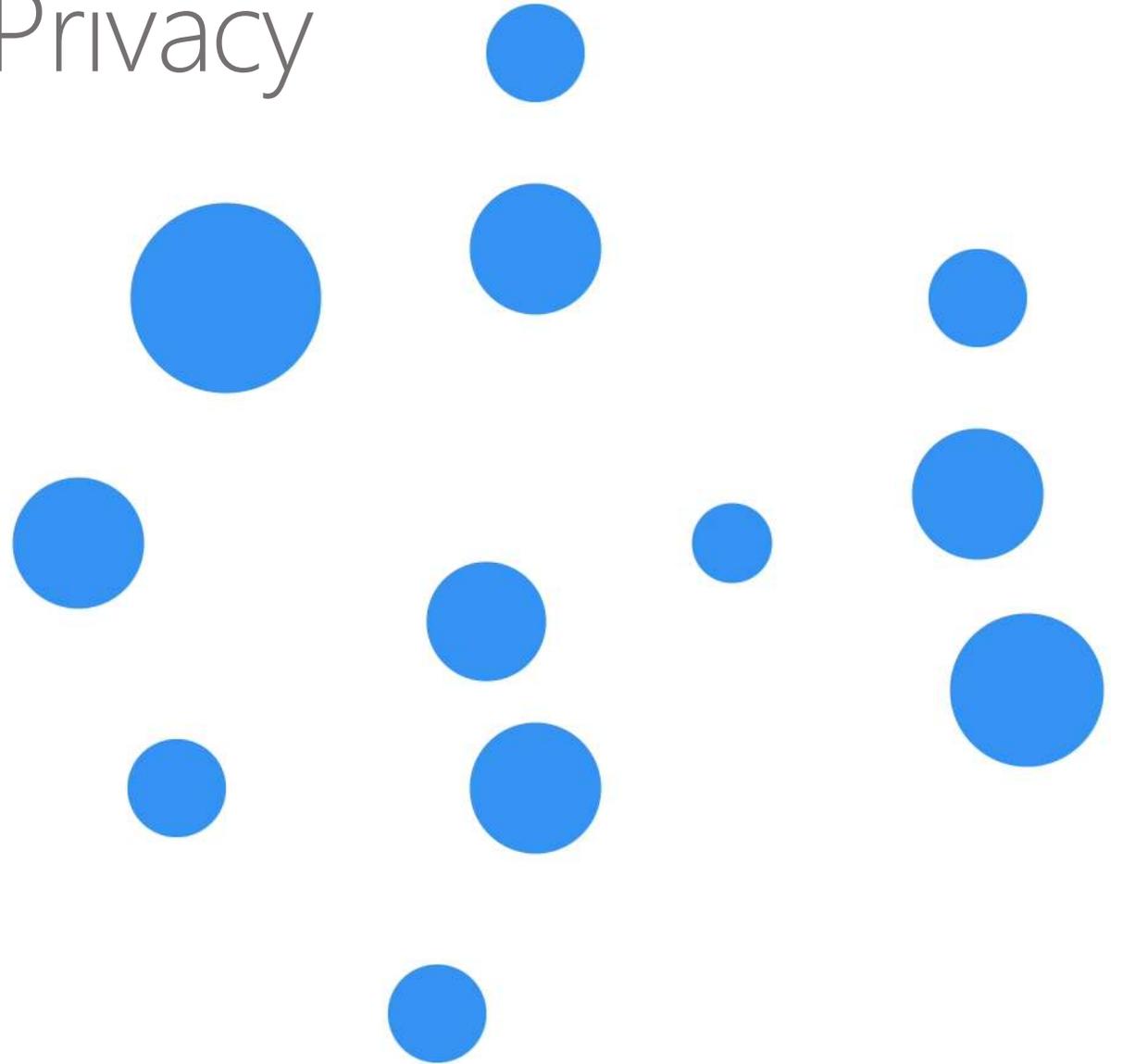
Meet consumers where they are in the "digital journey"



# 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

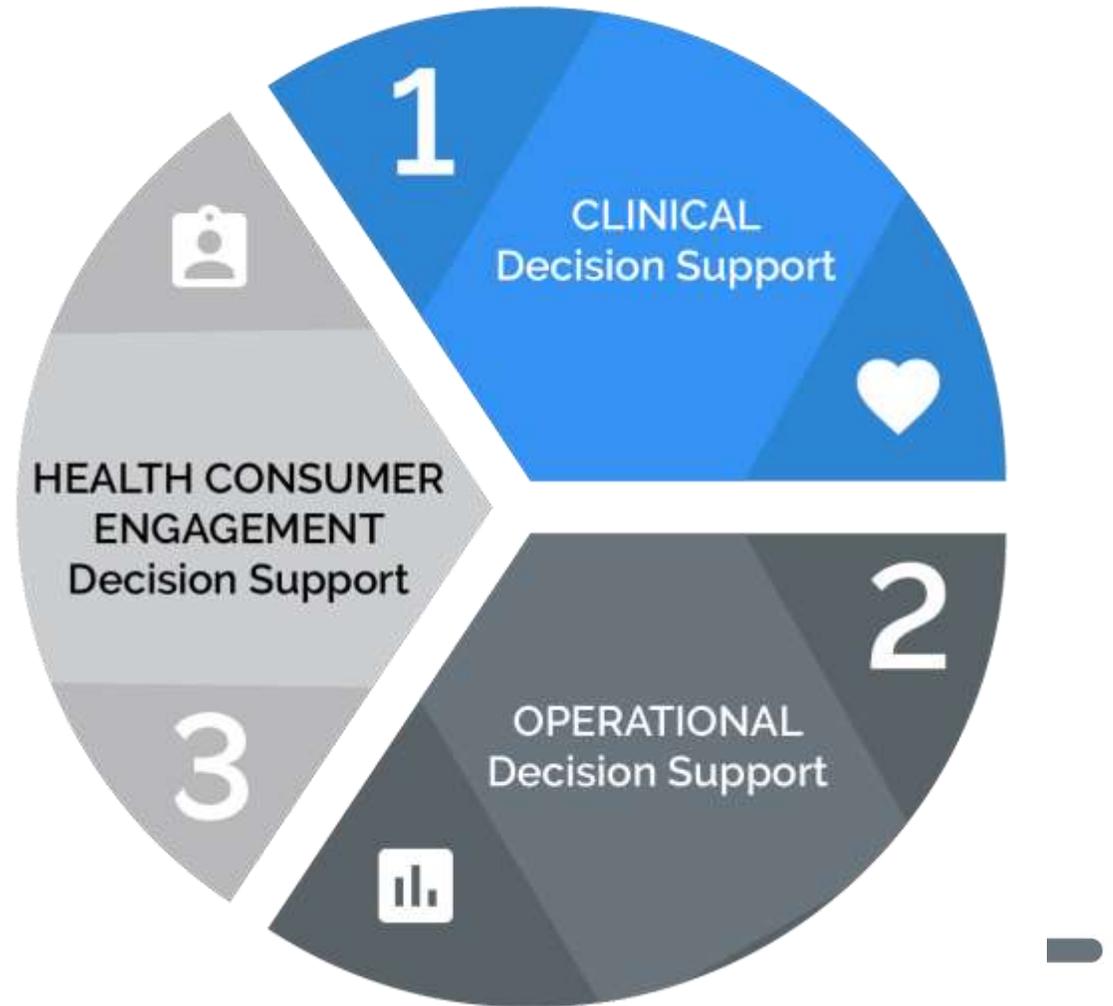


# Instrument, Inform, Repeat

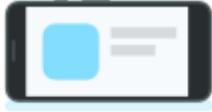
Record and analyze all health consumer engagement

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



Operations & Engagement Decision Support

App & Vendor Management

Instrumentation Management



Infrastructure

Workflow Processing

CRM Functions



Data Management

Engagement Event Logging

# Inspira Innovation Center & Inspira Health+



# Inspira Innovation Center





# *inspira*health | +

Technology for health by Inspira

Timeline

**July 17'**

Tech Bar Design. Program Design  
w/ 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

**Nov 17'**

IRB, Clinical Trial  
Process Starts  
  
Service line in-service

**Jan 18'**

IRB approved  
PREP Program starts

**June 18'**

Bariatrics (Post) begins

# Internally-facing



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

# Consumer-facing



App Store



Google play



amazon alexa



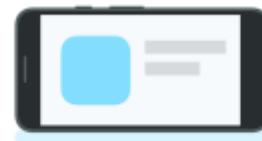
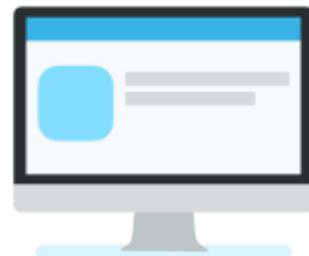
- My Inspira app
- Inspira Compass app
- InspiraHealthNetwork.org
- Inspira FB Messenger Chatbot
- Inspira Alexa Skill

## Curated Solutions

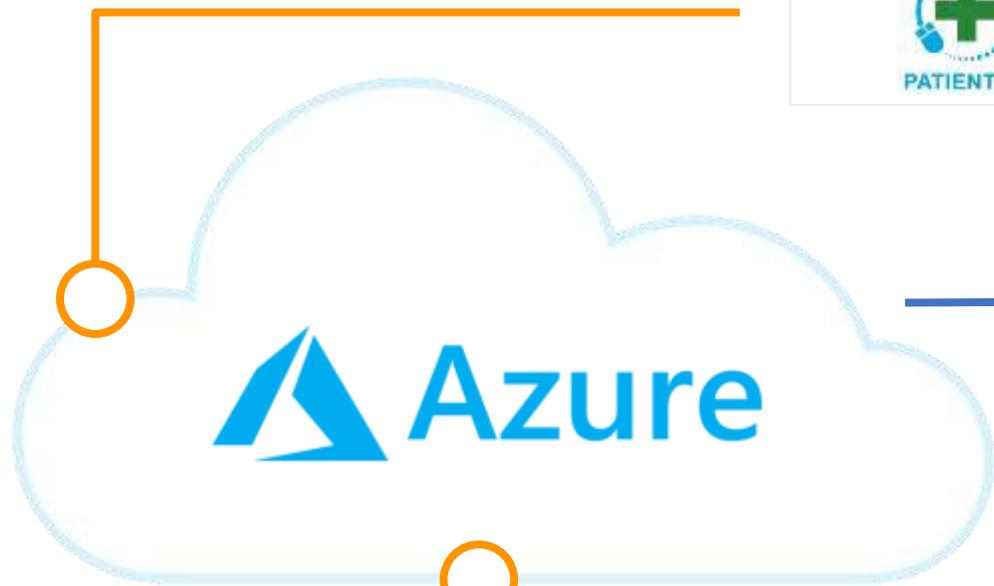


## Identity & Authentication

### User Channels

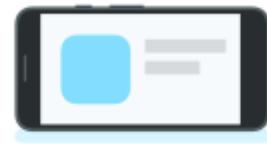


# Curated Solutions



**Identity & Authentication**

**User Channels**



# Access Center Customer Service

**Dynamics 365 Service Dashboards**

**New Alerts (45)** Latest: You've got an alert for the mailbox # Intraprise; 2/19/2018 12:28 AM View Alerts

SAVE AS NEW SET AS DEFAULT REFRESH ALL ADVANCED FIND

## Call Center Dashboard

### Activities by Owner

Daily Activities View

Owner	Count
Lynne Berni	1
Brooke Hendricks	4
GinaMarie Martinez	1
Justin Rodriguez	1
Dana Sities	7
Carmen Rosario	4

### Activities by Owner

Monthly Activities View

Owner	Count
Melissa Rodriguez	19
Lynne Berni	1
Lyshon Ellis	24
Sofiana Jeffries	23
Sherrri Vanneman	23
Sandra Hernandez	73
Brooke Hendricks	38
GinaMarie Martinez	10
Justin Rodriguez	90
Jenna VanMeter	1
Debra Shivaluk	27
Maria Fiorani	454
Patrick Meehan	43
Call Center	5
Lauren Nash	15
Makeda Mackey	19
Carmen Rosario	43
Jamesha Bryant	11

### Active Cases by Agent

Daily Cases View

Owner	Count
Dana Sities	1
Sherri Vanneman	1

### Active Cases by Agent

Monthly Cases View

Owner	Count
Carmen Rosario	30
Makeda Mackey	15
Dawn Lupperger	14
Lauren Nash	4
Donna Miller	4
Patrick Meehan	13
Maria Fiorani	81
Debra Shivaluk	5
Jenna VanMeter	1
Dana Sities	15
Justin Rodriguez	2
GinaMarie Mar.	143
Brooke Hendricks	8
Sandra Hernandez	7
Sherri Vanneman	14
Sherri Vanneman	95
Lynne Berni	62
Lyshon Ellis	12
Karen Perez	1
Meghan Adorno	14
Melissa Rodriguez	2

Active Information Banners

Search for records

Name	Description	Info Level	Begin Date	End Date	Created By	Created On	Modified By	Modified On
MAKO ROBOT/ROBOTIC ORTHO	Dr Eddie Wu(Premier Orth) or Dr Steve Frey(Advanced...	Information	2/9/2018	5/31/2018	Beth Ann Meremianin	2/8/2018 2:13 PM	Beth Ann Meremianin	2/9/2018 10:23 ...

# Physician Relationship Management

**Dynamics 365** PRM

You need to assign security roles to new users

SAVE AS NEW EDIT DELETE

## PRM Liaison Sched...

My Active PRM Tasks/Appointments

Search for records

Subject
<input type="checkbox"/> Call Dr. Datta about a pain management
<input type="checkbox"/> Schedule onsite visit to review Radiology
<input type="checkbox"/> Schedule onsite visit to review Radiology
<input type="checkbox"/> Need to train staff on HIE Clinician Portal
<input type="checkbox"/> Mammography Referral Visit
<input type="checkbox"/> Mammography Referral Visit
<input type="checkbox"/> Mammography Referral Visit

Physician Liaison Visit: Onsite visit with Dr. Wilson completed - Microsoft Dynamics 365 - Google Chrome

https://ihnsandbox.crm.dynamics.com/main.aspx?etc=10140&extrags=%3f\_CreateFromId%3d%257bE2EA1082-AFD2-EB11-8137-E0071B66DF...

Dynamics 365 Service Physician Liaison Visits Onsite visit with Dr. Wilson completed

SAVE SAVE & CLOSE NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW

Physician Liaison Visit INFORMATION

### Onsite visit with Dr. Wilson completed

Done! Beth Wilson Status: Active

General

Appointment	Initial Discussion - Review Inspira Services with Physician
Visit Type	Visit
Name	Onsite visit with Dr. Wilson completed
Scheduled Start	--
Scheduled End	--
Actual Start	2/7/2018 10:00 AM
Actual End	2/7/2018 11:00 AM
Contact Name	JAMES WILSON
Contact Phone	(609) 399-0700
Person/Group Email	--
Writing On-Reserve	--
Notes/Attachments	NOTES

**Onsite visit notes**

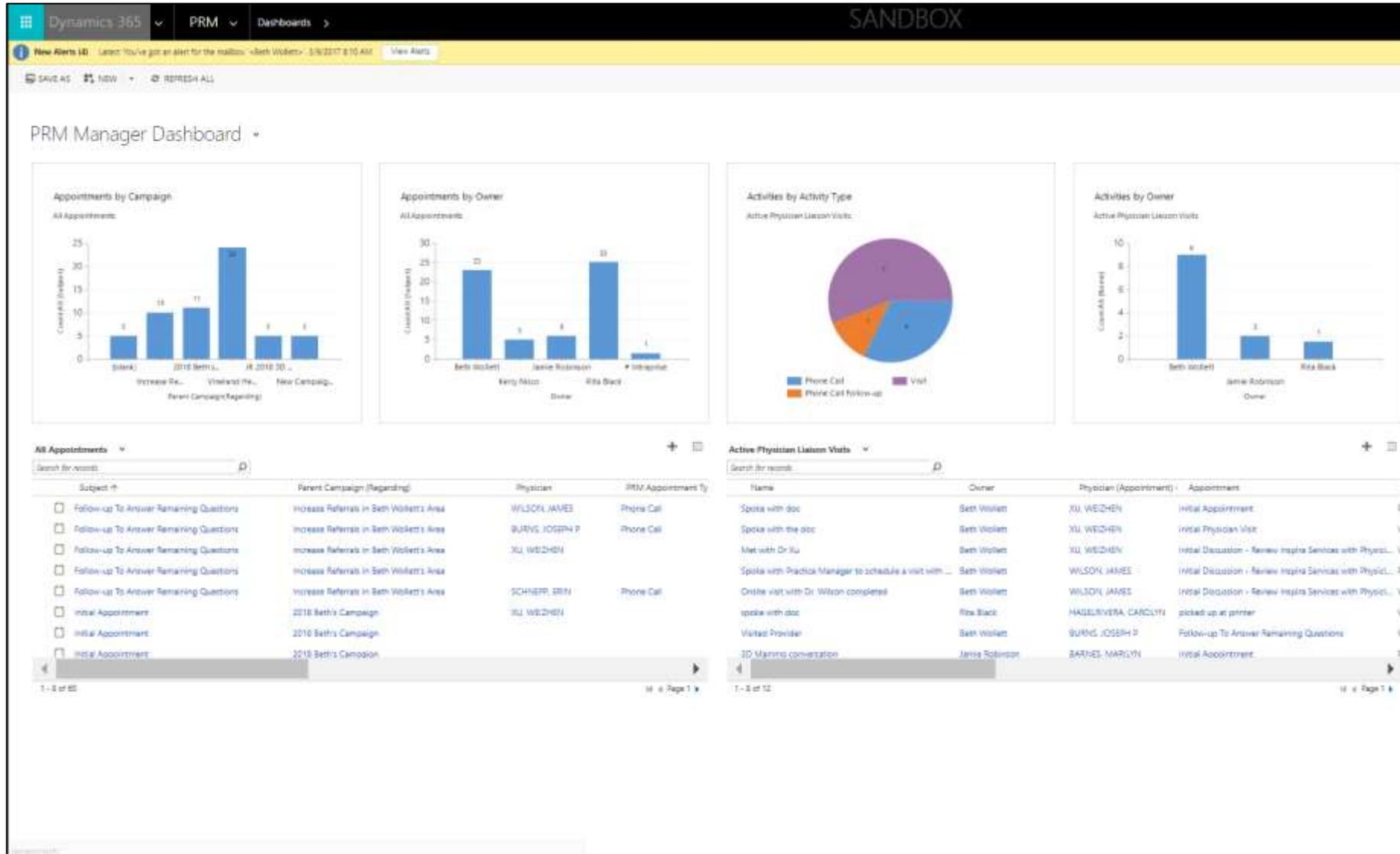
Meeting w/Dr. Wilson went well. He loved Maui! We discussed the new imaging services being offered, new Order sets available, and Patient Portal enrollment counts. Dr. Wilson is very happy with above.

Created By: Beth Wolkett Created On: 2/23/2018 12:52 PM Modified By: Beth Wolkett Modified On: 2/23/2018 12:52 PM

Map interface showing Philadelphia and surrounding areas. Red location pins are placed on the map, indicating specific locations of interest. The map includes major roads like I-76, I-95, I-295, and US-206, as well as landmarks like Wharton State Forest and Vineland.



# PRM - Manager Dashboard



# Health+ Initiative – Health Actions

**Dynamics 365** | Health + | Patients > 900065603 >

**New Alerts (45)** Latest: You've got an alert for the mailbox '# Intraprise'. 2/19/2018 12:28 AM [View Alerts](#)

SAVE | SAVE & CLOSE | + NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | EMAIL A LINK | RUN WORKFLOW | ...

PATIENT INFORMATION  
**900065603**

Owner: Intraprise EMR | Status: Active

### Patient Demographics

Assigning Authority	Inspira_Soarian	Address Line 1	1234 MAINTREE ROAD
MRN or Unique ID	900065603	Address Line 2	--
First Name	MICHAEL	Address City	BRIDGETON
Middle Name	--	Address State / Province	NJ
Last Name	TESTPATIENT	Address Postal Code	08302
Gender	Male	Address Country	--
Date of Birth	6/26/1983	Address Latitude	--
Race	White	Address Longitude	--
Religious Affiliation	--	Home Phone	1 (689) 898-9898
Patient Contact	MICHAEL TESTPATIENT	Home Email	--
Source	CRM	Is Test Patient	--

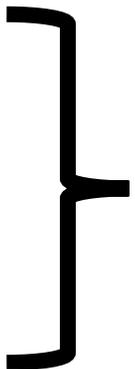
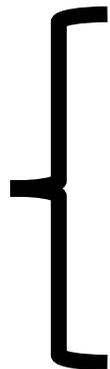
### Actions, Attestations & Data

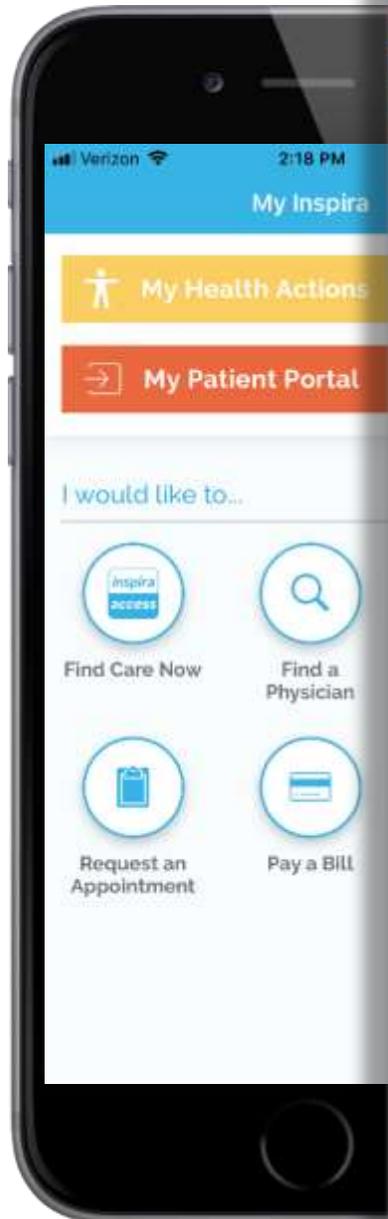
**Patient Health Actions**

Action Type (Health Action Item)	Display Order	Name (Health Action Item)	Description (Health Action Item)	Repetitions Per Week	Action Interval Type	Start Date	End Date	Completion Status	Health Measurement
Measurement	10	Record your blood pressure	During your measurement: Sit or lay down so you are...	3	Day	2/23/2018	5/23/2018	No	Blood Pressure
Measurement	15	Record your oxygen level	Record while: Wearing oxygen, if available Seated, sta...	2	Day	2/23/2018	5/23/2018	No	Pulse Ox
Standard	20	Eat a healthy low-salt diet	Limit your salt to 2,000 mg a day Limit fluids to 6-8 c...	1	Day	2/23/2018	5/23/2018	No	
Standard	30	Drink 10 - 12 glasses of water every day	Each glass should be approximately 8 ounces.\n\nPres...	1	Day	2/23/2018		No	
Standard	40	Take a light/casual walk for 30 minutes	It is recommended to do some light stretching for 5-1...	5	Week	2/23/2018		No	
Standard	50	See your Doctor as recommended	If an appointment needs to be scheduled or reschedul...	1	Open	2/23/2018	5/23/2018	No	

Created By: Intraprise EMR | Created On: 9/25/2017 5:04 AM | Modified By: Intraprise EMR | Modified On: 9/25/2017 5:04 AM

Active





Browser: <https://intraprisesandbox1.crm.dynamics.com/crmreports/viewer/viewer.aspx?action=run&helpID>

Measurement Type: Blood Pressure Report Period (Last x days): 120 View Report

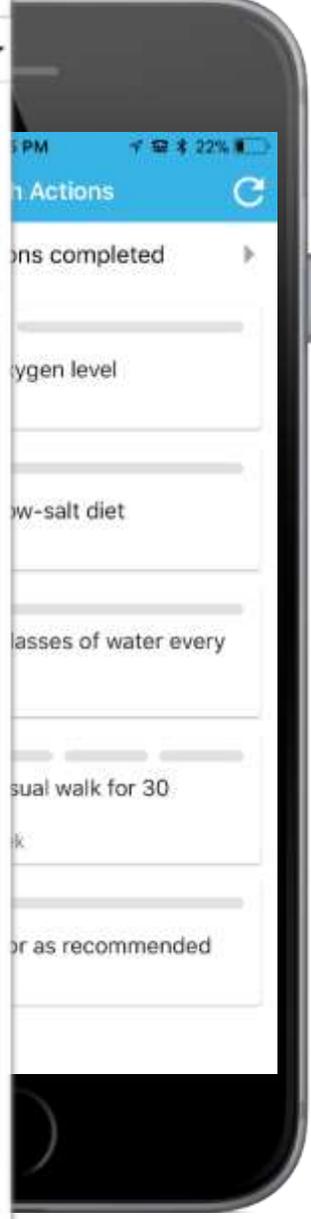
1 of 1 100% Find | Next

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

### Health Data Tracker

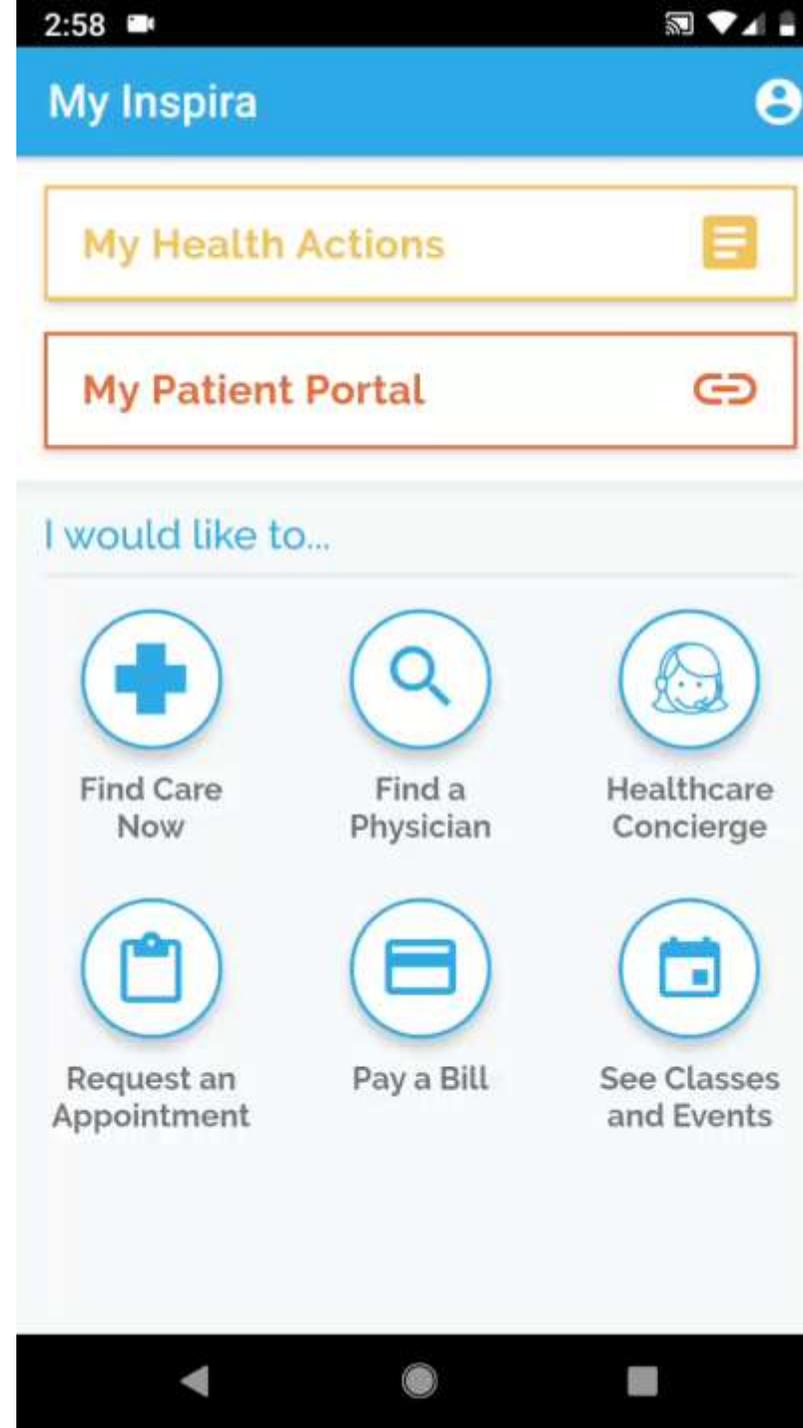
Reported On	Systolic (Value 1)	Diastolic (Value 2)
12/20/2017 3:17 PM	129	91
12/20/2017 3:23 PM	129	84
1/24/2018 2:07 PM	130	80
2/12/2018 12:53 PM	120	60
2/12/2018 12:54 PM	120	65

Patient	Reported On	Measurement Type	Value 1	Value 2
CAROL M JONES	12/20/2017 8:17:39 PM	Blood Pressure	129.0000 mmHg	91.0000 mmHg
CAROL M JONES	12/20/2017 8:23:13 PM	Blood Pressure	129.0000 mmHg	84.0000 mmHg
CAROL M JONES	1/24/2018 7:07:39 PM	Blood Pressure	130.0000 mmHg	80.0000 mmHg
CAROL M JONES	2/12/2018 5:53:42 PM	Blood Pressure	120.0000 mmHg	60.0000 mmHg
CAROL M JONES	2/12/2018 5:54:23 PM	Blood Pressure	120.0000 mmHg	65.0000 mmHg



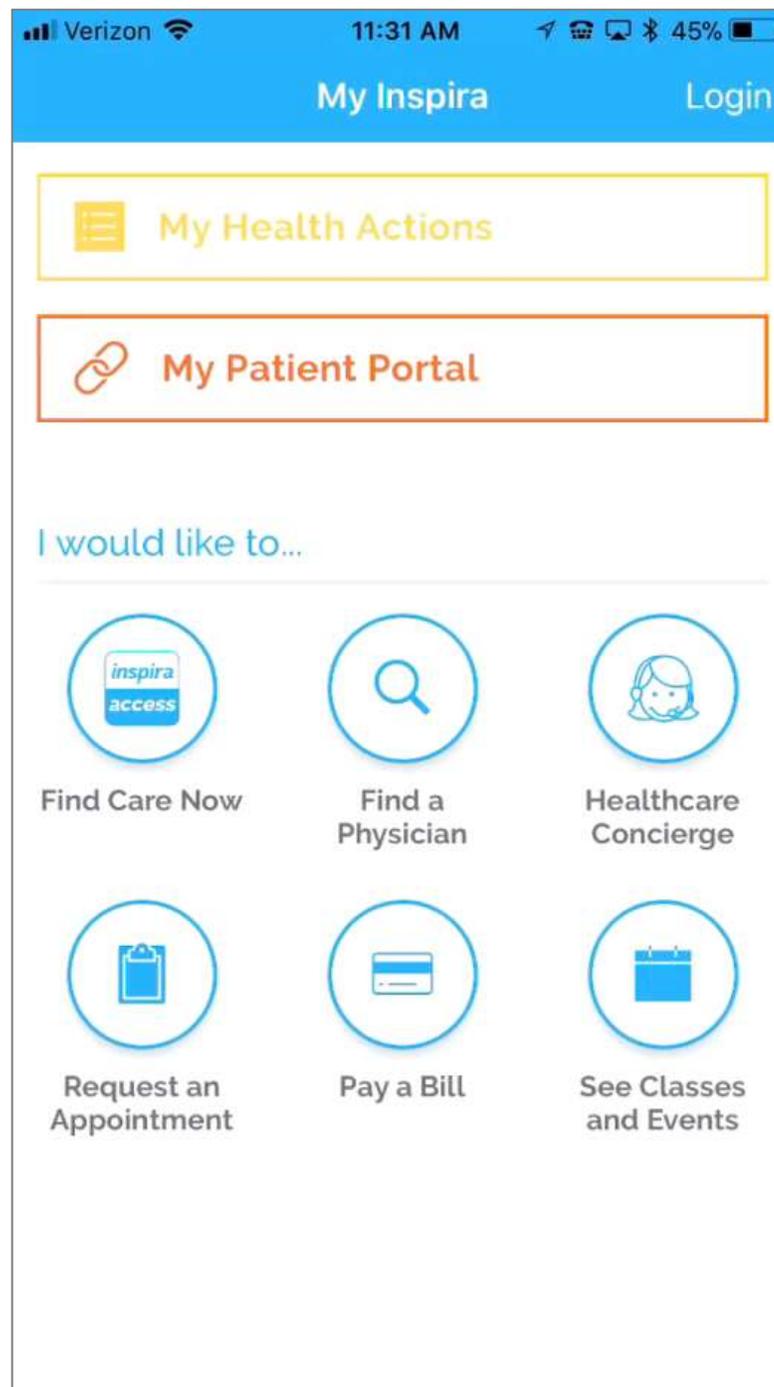
# My Inspira App

- 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



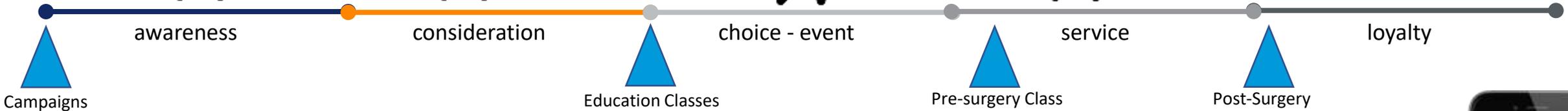
## Surgery

- Navigation
- Family updates
- Comfort & Clarity



## Post-Surgery

- Follow-up
- Accountability
- Recovery Support
- Adherence Support



## Marketing



- Marketing List
- Candidate Tracking
- Education and Nudging

## Bariatric Navigator



- Event Attendance Tracking
- Intervention and Nudging
- SMS / Email / Phone

## Bariatric Coordinator



- Assign Welcome Health Action
- Record interactions
- "Prescribe" My Inspira



## Bariatric Patient



- My Inspira
- Wearables
- Health Action Attestation

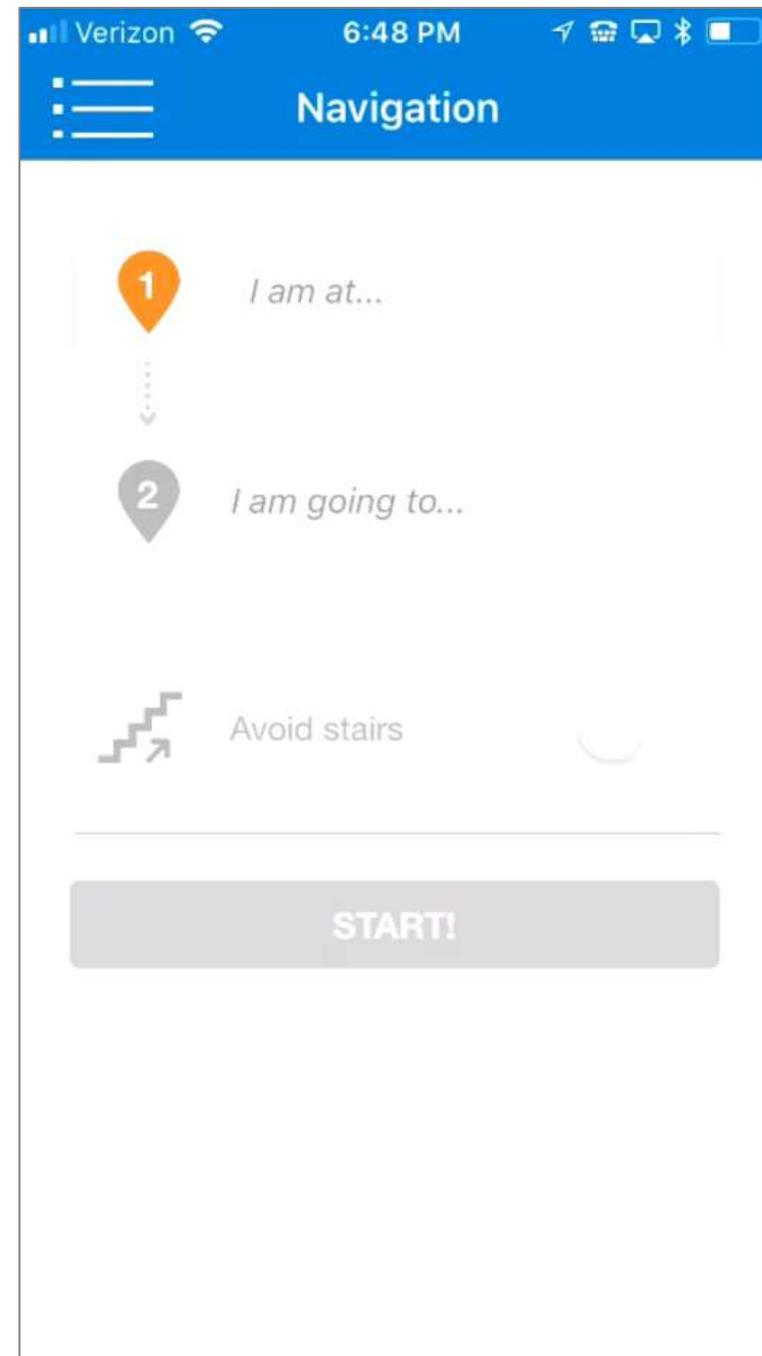


Increase Patient Volume  
Patients for Life

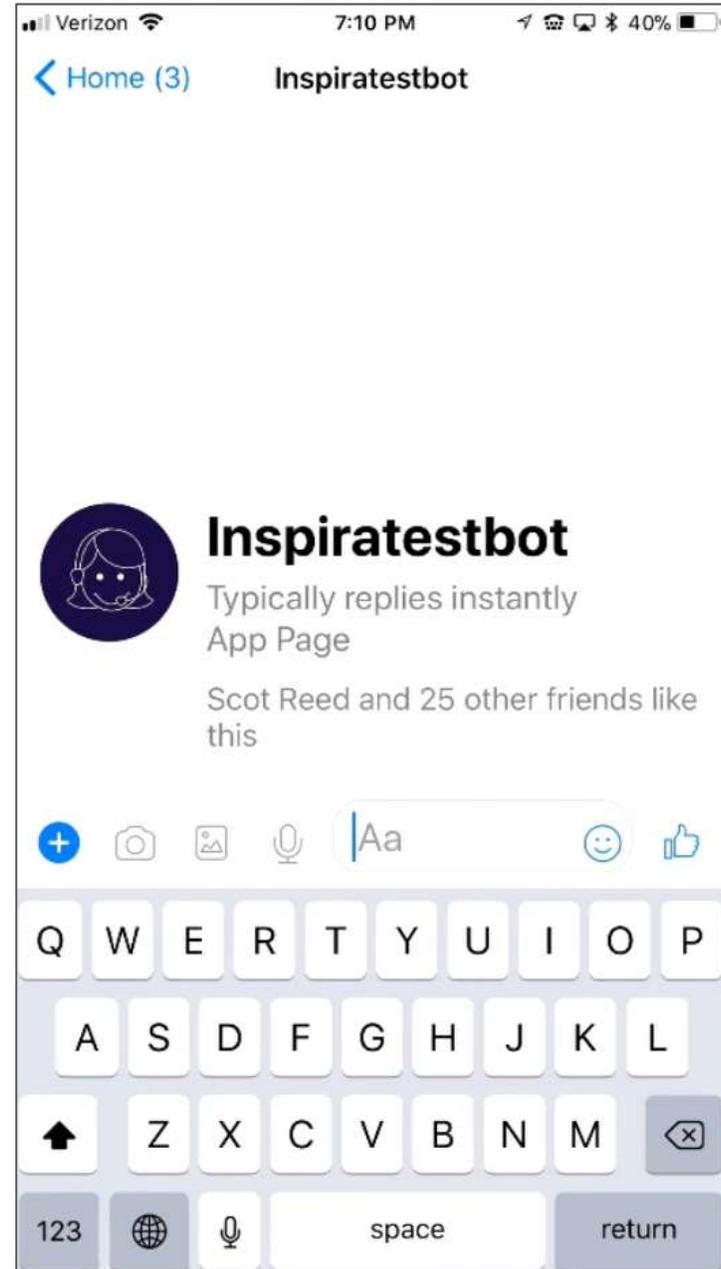
Improve Outcomes  
Wow Patient

# Inspira Compass App

\* Currently in app stores as "Inspira Compass"



# Inspira Messenger Chatbot



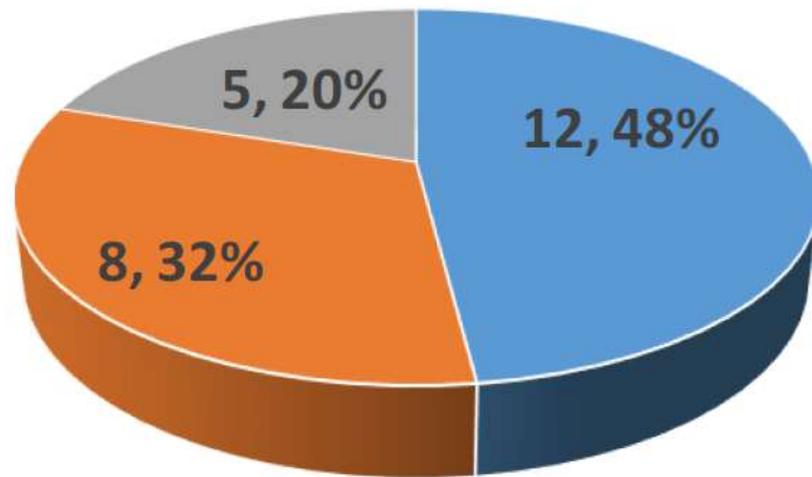
# Findings

- Inspira Health+ Initiatives
- Urgent Care Volume
- Referral Insights

0%

30 Day  
Readmit

## IRB - Clinical Trial Results

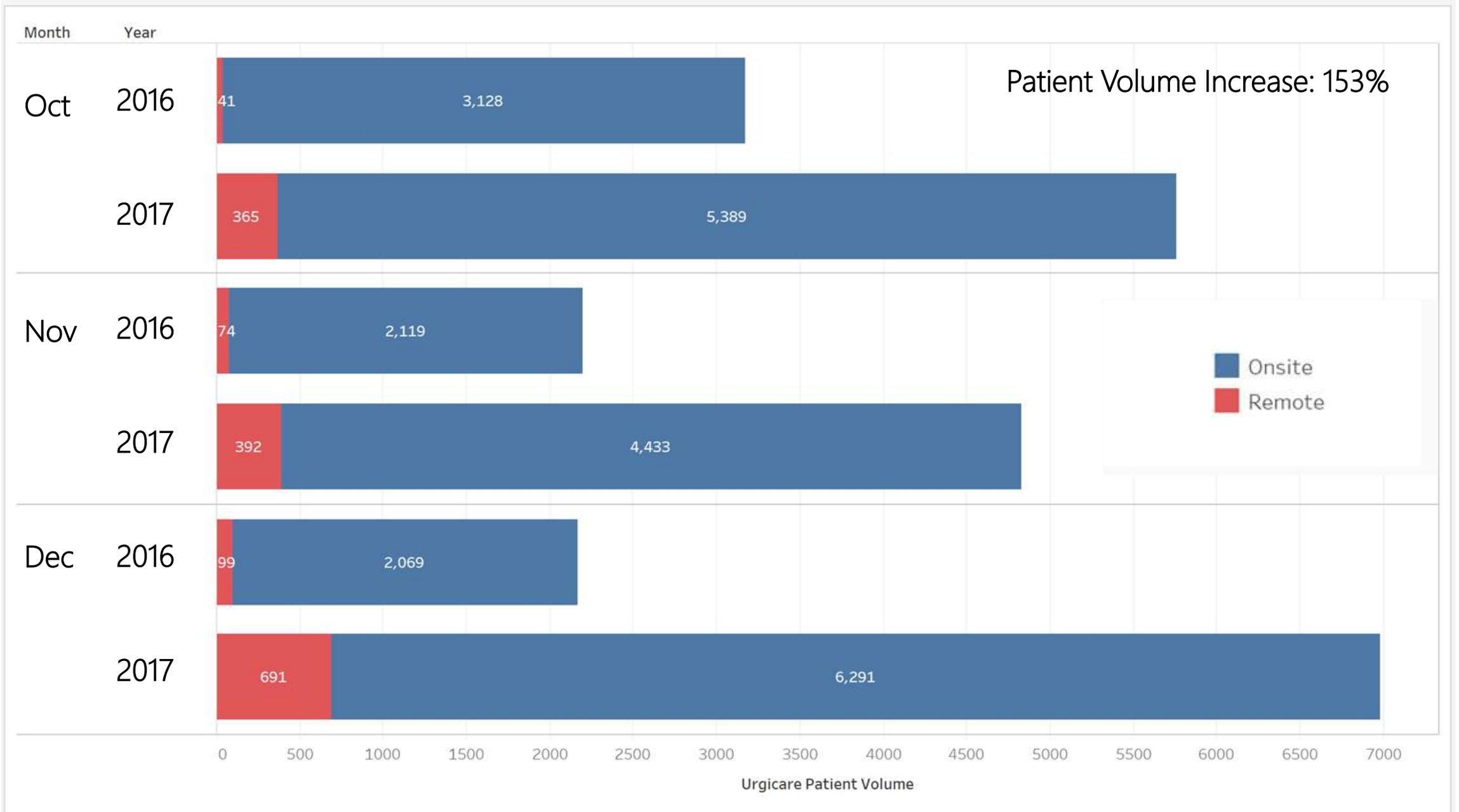


■ Enrolled ■ Users ■ Compliant

## 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



# Urgent Care Center Dashboard

## Average Time by Phase of Visit & Checkin Count

Total Visits

# 104029

CheckinType

- Onsite
- Remote

Location

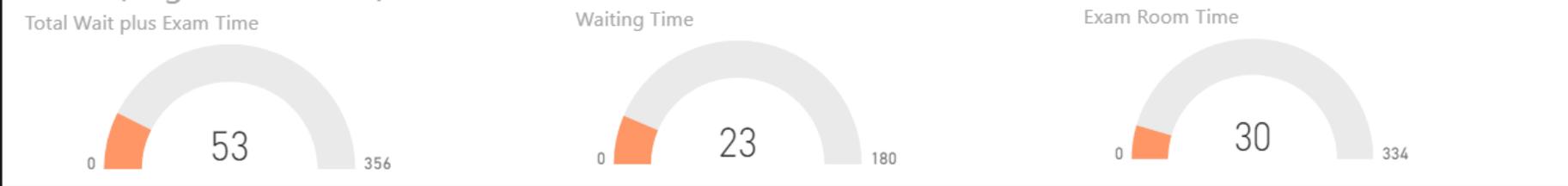
All ▼

Appointment\_Datetime

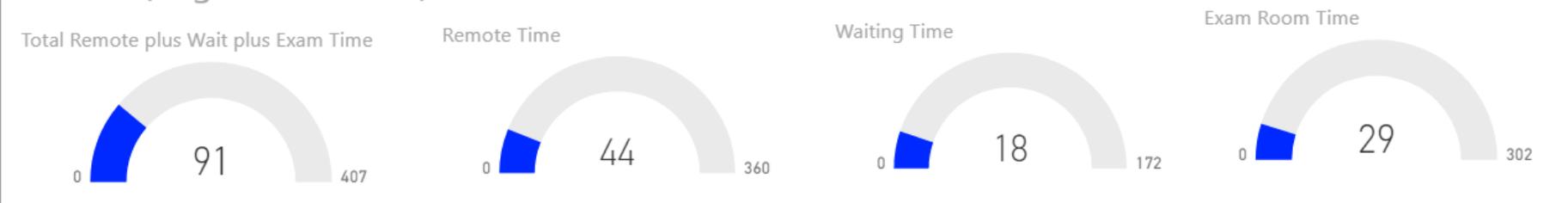
Y Q M W D  
Year

2016 2017 2018

### Onsite (Avg time in mins)\*\*



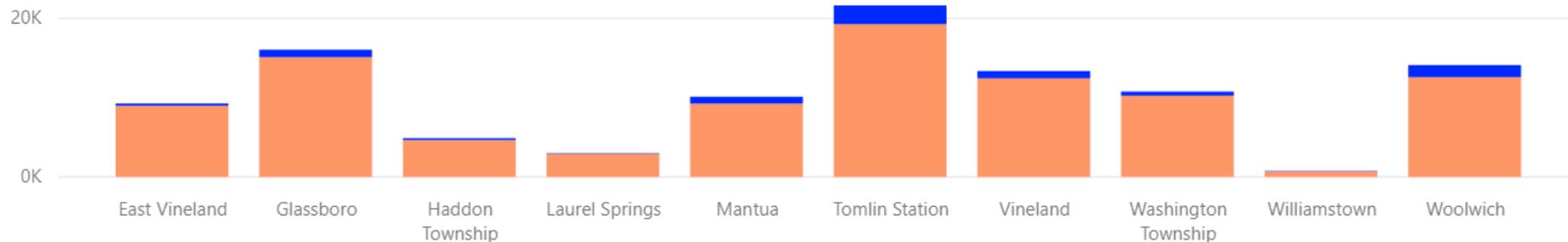
### Remote (Avg time in mins)\*\*



\*\*Average times exclude wait times where patient not moved in system from one phase of visit to another per standard operating procedures

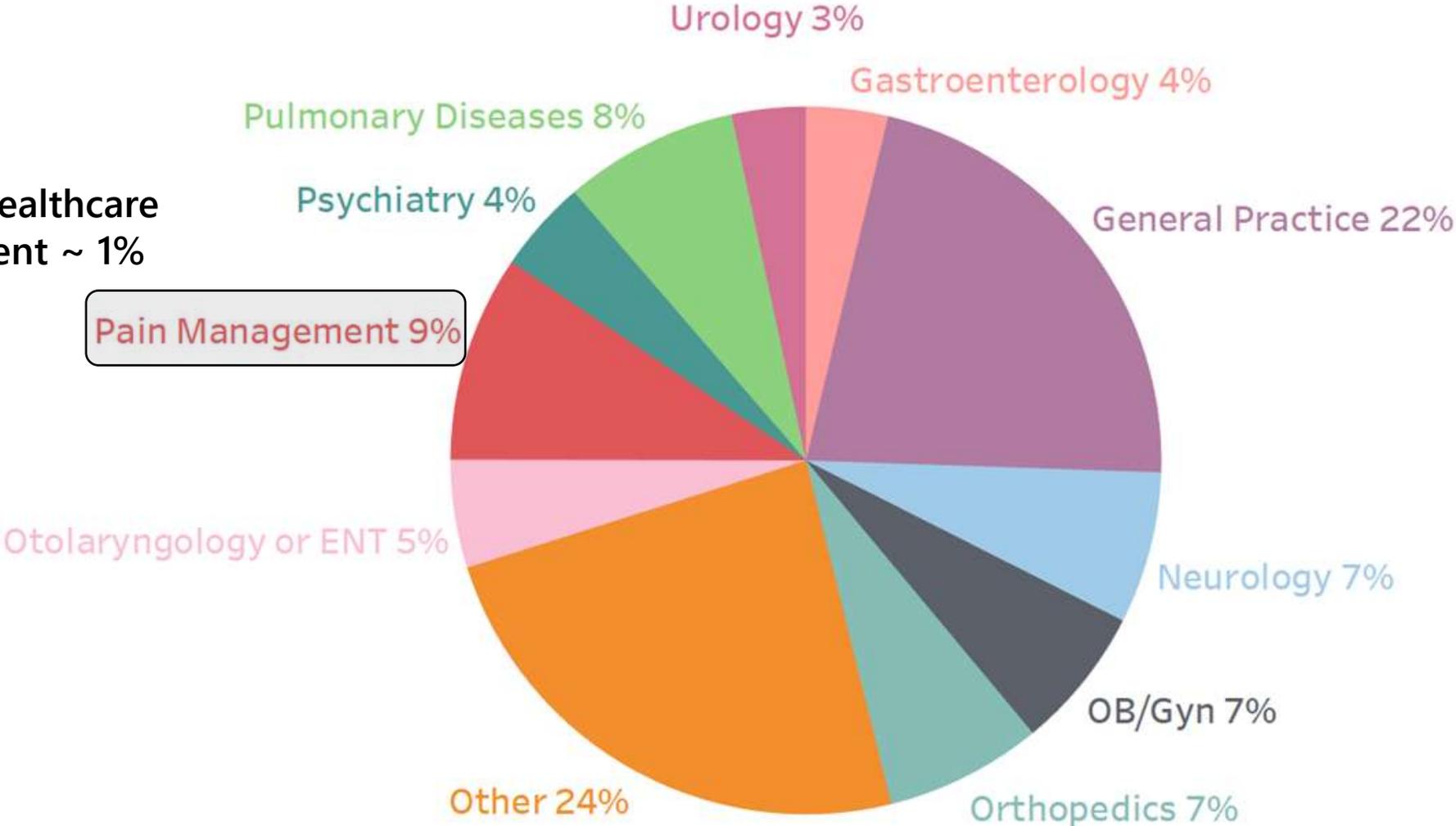
Checkins by Location

CheckinType ● Onsite ● Remote

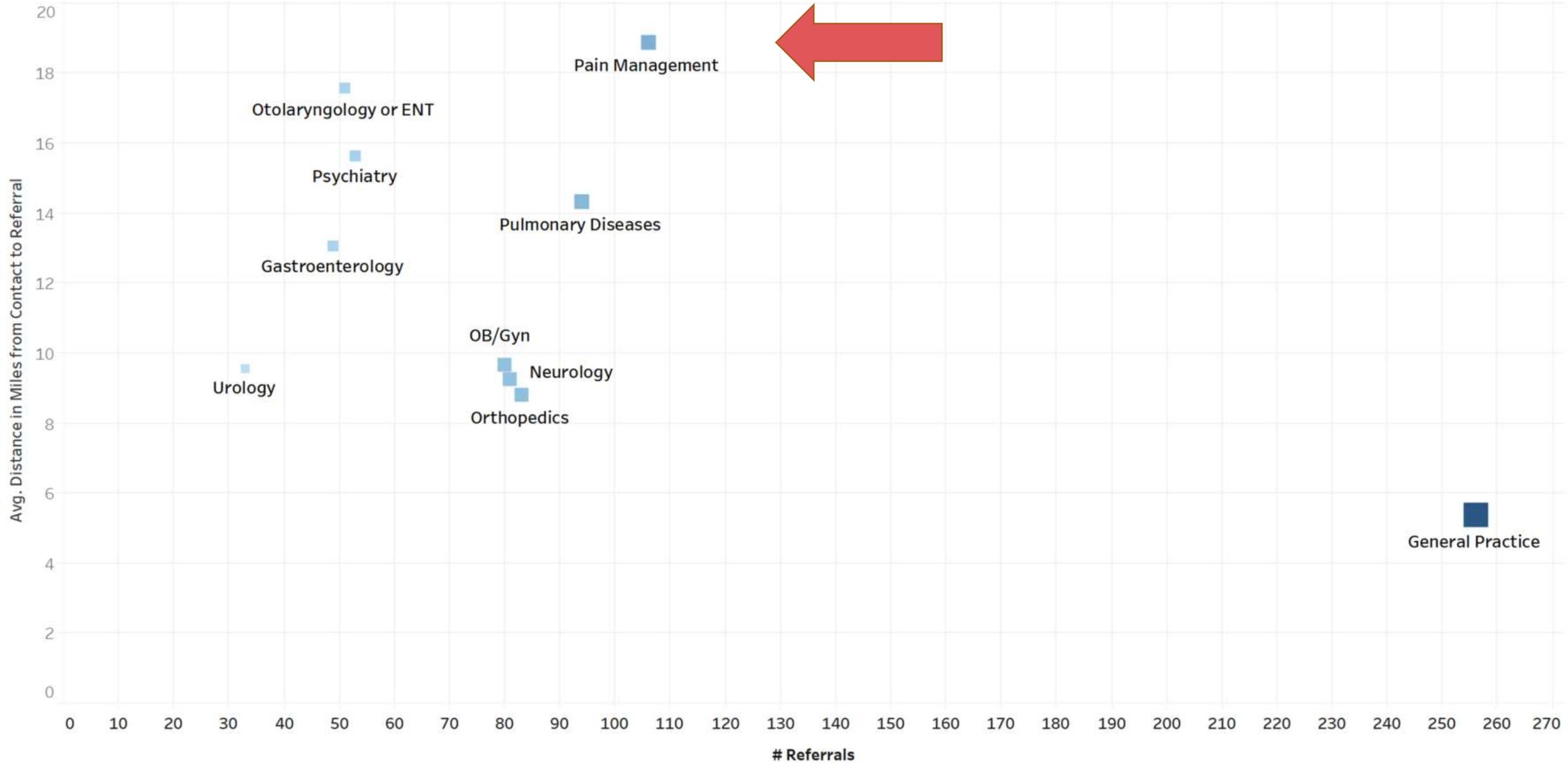


# Inspira Call Center Referral Insights

Compare to Definitive Healthcare  
Stats for Pain Management ~ 1%



# Referral Average Travel Distance



# 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

