

# How the CDPHP Digital Transformation Enabled 360-Degree Care Management With Its Hospital-to-Home Model

Established in 1984 as a physician-founded and -guided health plan, Capital District Physicians' Health Plan Inc. (CDPHP®) and its affiliates currently serve members in 29 counties in upstate New York. With the help of Huron experts, CDPHP accelerated its vision for wellness-focused care by concentrating on technology to create a 360-degree view of its constituents.

## Challenge

Embracing healthcare's shift from disease management to population health management, CDPHP teamed up with Huron to develop and execute a plan to increase the organization's focus on customer-centricity while also keeping members healthy and curtailing the utilization of high-cost services.

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*"We decided to take a step back, consider how our members truly want to be engaged, and then implement those tactics. We knew we needed to reinvest in all of our technologies."*

**SAMUEL MILLER**, VICE PRESIDENT  
OF ENGAGEMENT PROGRAMS

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Leaders understood that a digital transformation was required to achieve their vision and create a more holistic, collaborative, and consumer-centric approach to operations, care management, and communications. By evaluating how to better engage members in more meaningful ways, CDPHP made the decision to dramatically increase its use of Salesforce from deploying it for specific use cases to leveraging it as a full-scale customer relationship management (CRM) system.

CDPHP began a journey to develop a CRM ecosystem within Salesforce that would allow the organization to have a 360-degree view of members, providers, brokers, and employers. To expedite this process, CDPHP decided to work with Huron.

## Approach

Utilizing [Salesforce Health Cloud](#) as the primary technology, Huron helped CDPHP unite multiple data sources to provide a holistic view of members and providers. The comprehensive platform provides CDPHP employees and customer service representatives one place to quickly access the most up-to-date information about members, providers, and brokers.

Streamlining processes and automating manual tasks were foundational to the CDPHP digital transformation across various areas, including insurance operations, sales and marketing, member services, pharmacy services, clinical operations, and care management.

- **Care Management:** Huron and CDPHP collaborated on a customized solution using several Salesforce tools — including Health Cloud, MuleSoft, Communities, and Mobile Publisher — to create an end-to-end care management platform designed to support inpatient members and members transitioning from the hospital back to their homes.

The workflows for each functional area within CDPHP involve in-care transitions (inpatient care managers, outpatient care managers, shared clinical resources, etc.) that are seamlessly connected so every person on the team can access member records as needed to gain a broader understanding of each member's medical history. Huron received the [2021 Salesforce Partner Innovation Award](#) in the healthcare and life sciences industry for helping CDPHP improve these patient outcomes.

- **Member services:** To develop a comprehensive view of members to serve up essential information to member services representatives, CDPHP fully integrated its typical inbound call service option alongside additional channels, including web, fax, mail, and email. All member interactions now live within a single application where they can be recorded, viewed, and reported on.
- **Pharmacy contact center:** A new custom application was built using Salesforce Case Management to manage Medicare pharmacy inquiries. Guided screen flows were created to quickly create cases and complete common actions to allow for more efficient case documentation.
- **Medicare sales:** As part of the project, Huron helped address the Medicare sales team's needs. Using marketing automation solution [Pardot](#), the Medicare sales team automated email sends to prospects, enabling them to track responses and report on campaign effectiveness in real time. Additionally, a new broker community enabled prospect tracking and tied grant management insights to broker activities for the first time.
- **Multichannel marketing:** By using [Salesforce Marketing Cloud](#), Huron was able to integrate data already stored in Salesforce Health Cloud and combine it with additional clinical data to completely automate health-related email to better serve members. In addition to email automation, Huron created a custom communication preference center used in various campaigns to allow CDPHP members to update the frequency, channels, and types of communications they receive.

## RESULTS

Integrated eight legacy systems into one single-view system

Aligned technical teams, business stakeholders, and product owners into a centralized goal of delivering value to their specific areas of the business

**74%** of members being discharged enrolled in the care transitions program

**73%** of members met all program goals, including scheduling and attending a follow-up appointment with their provider, completing a medication reconciliation, completing an SDOH assessment, and addressing any barriers

**8,719** medication reconciliations completed

**2,304** care barriers identified and addressed

Guided member services workflows now result in more efficient case documentation and reductions in new agent training time

Entire sales management team can now track all prospects, tasks, and campaigns to drive membership in the Medicare line of business

Fully automated marketing engagements with members, including custom reporting analytics and 360-degree visibility into member outreach

Improved and guided quoting experience

Huron received the 2021 Salesforce Partner Innovation Award in the healthcare and life sciences industry, which recognizes Salesforce partners for outstanding innovation in transformative solutions that deliver customer success

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- **Small group quote-to-card:** With Huron's guidance, CDPHP implemented [Vlocity Member Maintenance](#) and quote-to-card services within its current health cloud. This included more than 20 integrations with its healthcare payor administration system and DocuSign.
- **Community-based organizations portal:** The Huron team collaborated with CDPHP to adapt Salesforce Community to share information with community-based organizations, such as food banks, to close members' gaps in care or identify social determinants of health (SDOH), such as food insecurity.
- **Engineering, procurement, and construction (EPC) contracting:** Leveraging DocuSign contract life cycle management (CLM) workflows and DocuSign for electronic signatures with an existing document repository, CDPHP enhanced its provider data model. With an automated and digitized contract renewal process, the organization gained a custom health network strategy application in Salesforce Health Cloud, automated email reminders via DocuSign, created custom workflows in DocuSign CLM, stored signed contracts in the document repository, and gained a management dashboard for real-time statuses.

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“We have a true CRM now, where you can follow a member and their relationships with their physicians and their employer groups. That is something that's given us flexibility, adaptability, and agility to handle any use case that either the market or internal customers ask of us.”

**SAMUEL MILLER**, VICE PRESIDENT  
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