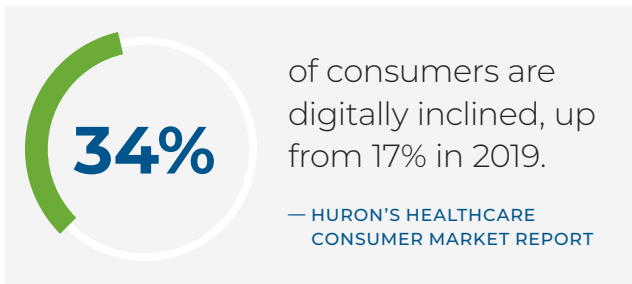


Delivering an Omnichannel Access Experience in Healthcare

HOW A ROBUST ENGAGEMENT STRATEGY ENABLED BY A HEALTHCARE CRM CAN HELP ORGANIZATIONS INCREASE CARE ACCESS AND PROVIDE A BETTER CONSUMER EXPERIENCE

By Scott Brown, Leah McCanna, Fred Stevens, and Annie Zilius

From the acceleration of digital health to the ever-growing number of communication platforms, consumer expectations and preferences for how they interact with their health system are rapidly evolving.



The [desire for more digital functionality](#) and personalized interactions makes it clear that healthcare organizations need to expand how and where they engage with consumers to keep patients healthy and happy.

Healthcare retailers, technology companies, and other market disrupters will continue to challenge patient loyalty as they find innovative ways to deliver convenient, digitally enabled healthcare experiences that consumers want.



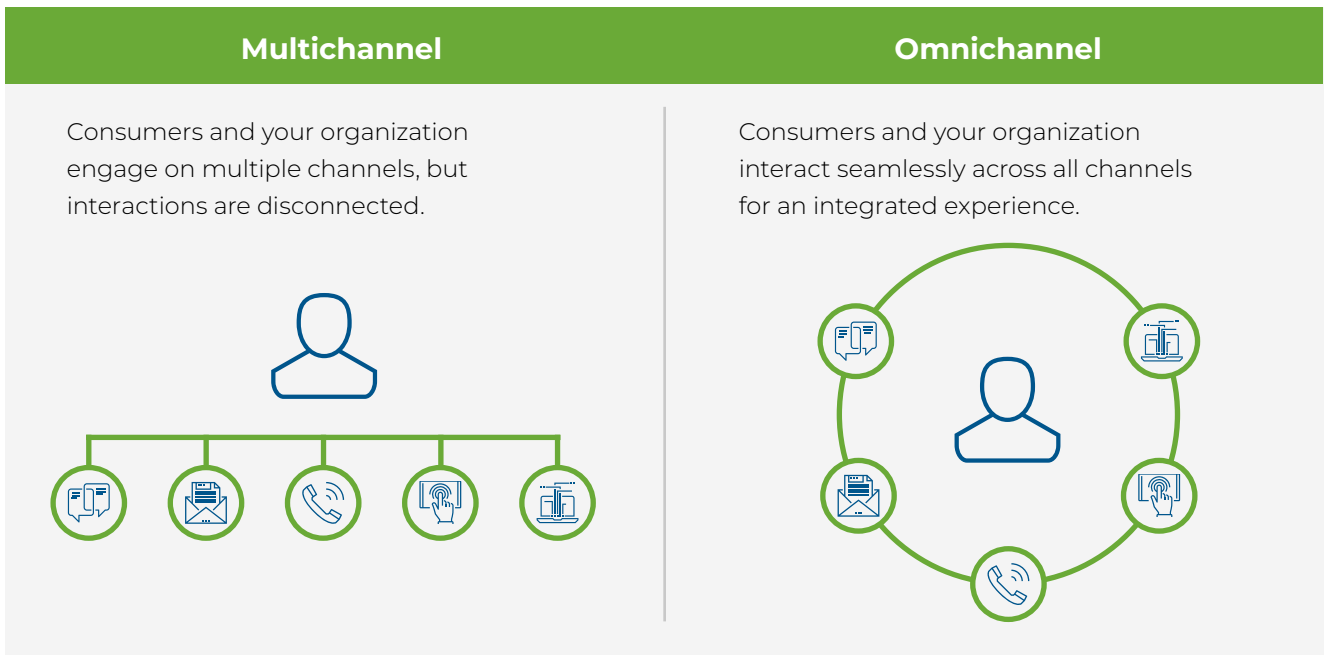
of consumers are willing to switch providers for superior digital offerings.

— HURON'S HEALTHCARE CONSUMER MARKET REPORT

Organizations should plan for how shifts in care settings, from telehealth to acute care in the home, will increase the volume of interactions outside their walls, which further supports the need for robust engagement strategies.

With care access among the [top care transformation challenges](#) identified by healthcare leaders, an omnichannel engagement strategy is crucial to providing a seamless access experience — inside and outside the organization.

Health systems are making headway in diversifying their engagement channels, but to deliver an omnichannel experience, leaders need to focus on connecting and coordinating interactions across channels.



Breaking Down Communication Siloes

Most consumers today use more than one channel to communicate and engage with organizations. When these interactions are siloed and disconnected, consumers are left to make sense of disparate and often conflicting information, leading to poor experiences, or even worse, poor outcomes.

As consumers transition between channels, the flow of communication and information should be continuous, building off previous interactions. To create this seamless journey, organizations need visibility into consumers' touch points to understand where they are in their care journey to facilitate more informed conversations and connect patients with the proper care.

Customer relationship management (CRM) platforms like Salesforce provide the crucial infrastructure to track these touch points and support patient engagement across channels. As organizations consider enterprise platforms like CRM, they should begin with stakeholder alignment on priority use cases as they look to improve the broader consumer and patient experience.

Enabling an Omnichannel Experience With a Healthcare CRM

While [Huron's research](#) into healthcare's digital, technology, and analytics landscape finds that leaders are showing a greater interest in CRM investments, there's still some uncertainty about its value in healthcare.



Here are four ways healthcare organizations can use Salesforce to support an omnichannel access strategy and improve the consumer experience and journey:

Build a 360-degree consumer view: Disjointed data and systems have long been a pain point for

healthcare systems. With Salesforce, organizations can seamlessly connect systems to pull together data from multiple sources for a holistic view of each patient. By combining nonclinical and clinical consumer data into a single view, staff can better identify patient needs and social risks to connect individuals with the right care and resources at every step in their healthcare journey. Artificial intelligence (AI) integrations enable more efficient and effective interactions with features like pop-up scripting to help guide staff to the correct response and action when addressing patient inquiries.

Connect engagement across channels: As consumers transition between channels, creating a continuous, streamlined flow of communication is paramount to delivering an omnichannel access experience. Salesforce enables organizations to connect, set up, and manage communication across channels — from phone and chat to patient portals and social networks — in a single platform. Consumer preferences are captured within the system so staff can engage with patients in the way they prefer.

Manage consumer interactions and encounters: With a unified view of engagement and consumer data, organizations gain visibility into a patient’s touch points, making it easier for staff to identify where they are in their care journey to keep patients moving seamlessly through the system. This visibility, paired with the platform’s integrated communication functionality, provides an avenue to track new consumer interactions and deploy personalized engagement strategies to pull individuals into an organization’s network.

Orchestrate targeted, informed outreach: Equipped with a 360-degree view of patients and their preferences, healthcare organizations can use Salesforce to target populations with messaging personalized to consumer care needs, disease prediction, communication preferences, social determinants, and various other factors. Personalized and proactive outreach like appointment reminders, wellness and disease management program information, and post-discharge communication keeps patients informed and boosts engagement in their care.

Automated communication can be enabled to ensure patients receive relevant information at the right points in their healthcare journey.

Extending the Value of CRM

Ultimately, the goal of a CRM is to engage, acquire, and retain consumers, but when intentionally integrated within an organization’s technology ecosystem, organizations can evolve how they interact with patients and unlock the value of an omnichannel approach.

CONSUMER OUTCOMES	BUSINESS OUTCOMES
<ul style="list-style-type: none"> Seamless, consistent experiences Improved satisfaction Increased access to care Improved patient outcomes 	<ul style="list-style-type: none"> Increased patient and employee engagement Increased market share through patient retention and acquisition Enhanced staff efficiency and improved staff experience Reduced staff burden

As healthcare organizations make progress in re-imagining the access experience to better meet consumers’ needs and preferences, the role of a healthcare CRM like Salesforce can be expanded beyond the access center. From improving collaboration throughout the entire consumer journey to enhancing patient-provider relationships, [building stronger care networks](#), and quantifying marketing return on investment, CRM has the potential to enable transformation across the organization. Developing a vision for the health system’s long-term CRM approach will be essential to maximizing the technology’s value.



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