

Health System Develops Dynamic Patient Journey

A large nonprofit health system utilized Salesforce to personalize the surgical journey for joint replacement patients to improve engagement and outcomes.

Challenge

The leaders at a large health system were committed to building deeper relationships with their consumers by better understanding consumer needs and delivering on the organizations' brand promise to provide the highest standards of safe, evidence-based, and quality care for a personalized and outcome-oriented experience.

With these goals at the forefront, the team focused on improving the consumer experience and health outcomes for joint replacement surgery patients. Leaders had little insight into the effectiveness of their current patient education materials on patient behaviors and outcomes.

Additionally, patients' experiences varied by the facility. Communication and access to preoperative and postoperative resources were inconsistent. Nurse navigators who guided patients through their surgical journey relied heavily on manual processes and lacked the ability to personalize outreach to patients at scale.

In alignment with the health system's digital consumer transformation road map, the team began developing plans to improve patient engagement with joint replacement surgery patients that could eventually be scaled across service lines.

Results

Dynamic **patient education** and engagement

Reduced administrative burden

Streamlined **nurse navigator** role

51% click-to-open email ratios

64% email open rate

Over **half of patients engaged** in email journey

Approach

Huron worked with leaders at the health system to implement an integrated Salesforce Health Cloud and Marketing Cloud solution for patient education and engagement and a care management system for orthopedics nurse navigators.

The approach used Salesforce to **transform and personalize the patient journey** from preoperative to postoperative stages. Journeys were designed to influence patient compliance with behaviors before and after surgery, reducing complications, lowering readmissions, and improving overall outcomes.

“The need for this type of patient journey within our health system is immeasurable. This is how consumers are communicated with in most other aspects of life. To be able to offer this to our patients will hopefully provide better outcomes for our patients. So glad orthopedics was able to be the pilot”

DIRECTOR, ORTHOPEDIC SERVICE LINE

The Salesforce solutions connect and share information seamlessly, enabling a **dynamic patient journey** based on the procedure type, the stage of the procedure (i.e., preoperative vs. postoperative), and the facility.

Patient journeys include the following:

Custom communication: Salesforce enables the organization to deploy patient email programs that are entirely dynamic for the patient based on their pre-screening date, surgery date, and other preoperative and postoperative stages.

Communications are customized to encourage patient compliance throughout the surgical process with checklist items directly in the email. As patients complete behaviors, checklists automatically update in follow-up emails.

Additionally, patients are enrolled in a program for each specific surgical encounter, allowing for further customization and results tracking.

Journey history reports helped to show which programs are most effective, allowing for the ongoing optimization of communications. Half of the total number of unique surgery patients have engaged in the email journey. Email open rates remain at an average of 64% with a click-to-open ratio of 51%.

Dynamic patient education: Before the improvements, patients received an extensive paper manual greater than 50 pages. In their new journey, patients are directed to a customized, dynamic patient education website experience built using Marketing Cloud Web Studio, which gives them access to education for their specific procedure type, stage, and facility. Articles displayed are updated based on what patients have viewed or completed along their journeys, further individualizing their education.

Salesforce records update in real time to show nurse navigators which content and version is consumed, allowing them to follow up with more personalized communication and reminder emails.

Patient education materials are stored with Salesforce Knowledge articles, allowing for standardization and quick updates to education materials. One month into the program, more than 1,280 patient education articles or playlists have been viewed.

Improved nurse navigator performance and compliance: Nurse navigators view a single orthopedics joint replacement care plan for each surgical appointment per patient so that all audit and reporting fields are in one place and format. Care teams have visibility into a patient's overall marketing cloud journey process, including engagement with email communications and articles read on the education site.

Required reporting to The Joint Commission is standardized across all facilities, allowing nurse navigators to quickly complete the auditing process at each checkpoint, helping to ensure accreditations are maintained efficiently.

Scalability and Ease of Use

The work with Huron provided the health system with a structure and process for patient journeys and patient education programs. The existing framework allows leaders to quickly develop personalized patient journeys for other departments, with little to no support from outside consulting or vendors.



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