

September 28, 2023

Unlocking Patient-Centric Care

Harnessing CRM, Data Analytics & AI



MEET

Our Presenters



Carmel Wynkoop

Partner

Business Analytics & Automation
Industry Experience: 20+ years



Ron Present

Partner

Healthcare Industry Group
Industry Experience: 30+ years



KNOWLEDGE

Learning Objectives



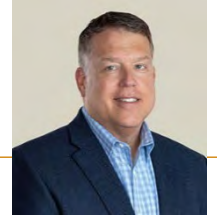
Learn how the right CRM system can unlock a better experience for your patients



Gain valuable insights into how CRM data can optimize healthcare operations and reduce costs



Review implementation best practices to ensure the privacy and security of your patient data



Healthcare Industry Challenges





Technology Addressing Healthcare Industry Challenges

*Transforming Patient Care, Optimizing Operations and Ensuring
Data Privacy & Security*



AI TRANSFORMING PATIENT INTERACTIONS

Leveraging AI for Engagement and Personalization

Patient Engagement through AI:

- *Chatbots and Virtual Assistants:*
 - AI-driven chatbots provide instant responses to patient inquiries
 - Enhances patient engagement by offering 24/7 support and information access
- *Personalized Health Apps:*
 - AI algorithms tailor app content based on individual health data
 - Encourages continuous patient engagement and adherence to health plans

Streamlined Access to Information with AI:

- *Voice-Activated Interfaces:*
 - AI-powered voice recognition facilitates hands-free access to health information
 - Improves accessibility for patients with varying levels of tech literacy
- *Predictive Search and Recommendations:*
 - AI analyzes patient history to provide relevant health information
 - Streamlines access to personalized health resources and recommendations

Personalized Communication Enabled by AI:

- *Automated Messaging Systems:*
 - AI automates personalized appointment reminders, follow-ups, and health tips
 - Enhances communication efficiency while maintaining a personalized touch
- *Behavioral Analysis for Tailored Communication:*
 - AI analyzes patient behaviors to tailor communication strategies
 - Ensures messages resonate with individual preferences and health needs



CRM DATA OPTIMIZATION FOR HEALTHCARE OPERATIONS

AI-Driven Operational Optimization

- **Appointment Scheduling Optimization:**
 - AI algorithms analyze historical data to predict peak appointment times.
 - Enables dynamic scheduling for improved resource utilization and reduced wait times.
- **Resource Allocation and Staff Scheduling:**
 - AI-driven models consider patient flow patterns and staff availability.
 - Facilitates optimized resource allocation, minimizing operational bottlenecks.
- **Real-time Analytics for Decision Support:**
 - AI-powered dashboards provide real-time insights into patient data and operational metrics.
 - Supports data-driven decision-making for administrators and healthcare providers.
- **Patient Feedback Analysis:**
 - Natural Language Processing (NLP) algorithms analyze patient feedback.
 - Identifies trends and areas for improvement, enhancing service quality.
 - Auto-generated surveys and analysis based on feedback
- **Outcomes Tracking and Predictive Analytics:**
 - AI analyzes patient outcomes and historical data to predict future trends.
 - Supports proactive decision-making for better patient care.



ENSURING PATIENT DATA PRIVACY & SECURITY

Implementation Best Practices for Data Privacy and Security

- **Data Encryption:**
 - Implement strong encryption protocols for data at rest and in transit
 - Ensure that sensitive patient information is securely stored and transmitted
- **Access Control:**
 - Establish role-based access control to restrict data access to authorized personnel
 - Regularly review and update access permissions
- **Compliance with Regulations:**
 - Adhere to healthcare data privacy regulations (e.g., HIPAA)
 - Conduct regular compliance audits and assessments
- **Data Backups:**
 - Maintain frequent and secure backups of patient data
 - Test data recovery processes to ensure data availability
- **Training and Awareness:**
 - Provide staff training on data security protocols and best practices
 - Foster a culture of data security awareness among employees
- **Incident Response Plan:**
 - Develop a robust incident response plan for data breaches
 - Ensure swift detection, containment and reporting of security incidents

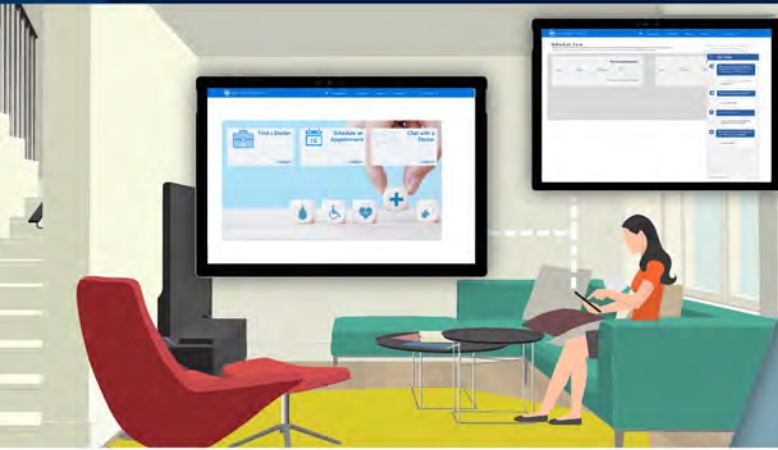


Example CRM

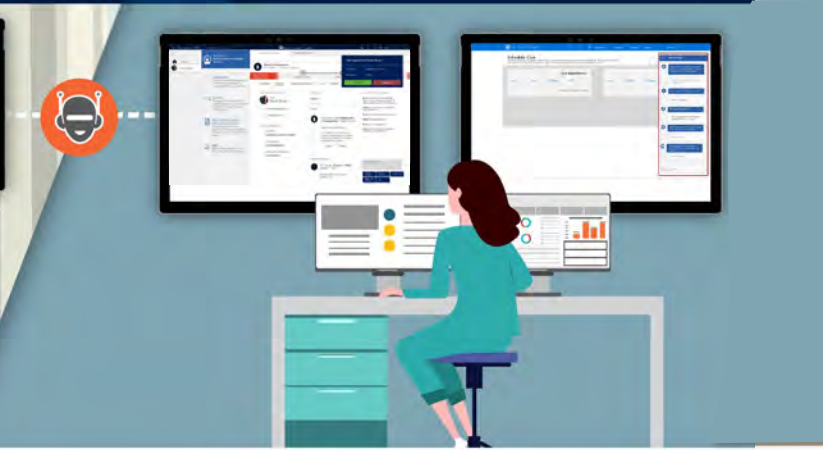
Microsoft Cloud for Healthcare

Enhance Patient Engagement

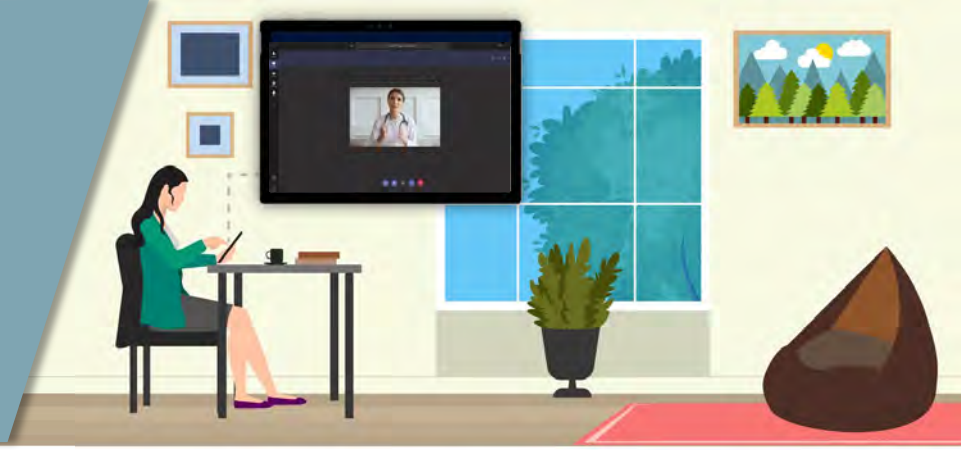
1 Digital Patient Portal



2 Automated & Live Health Bot



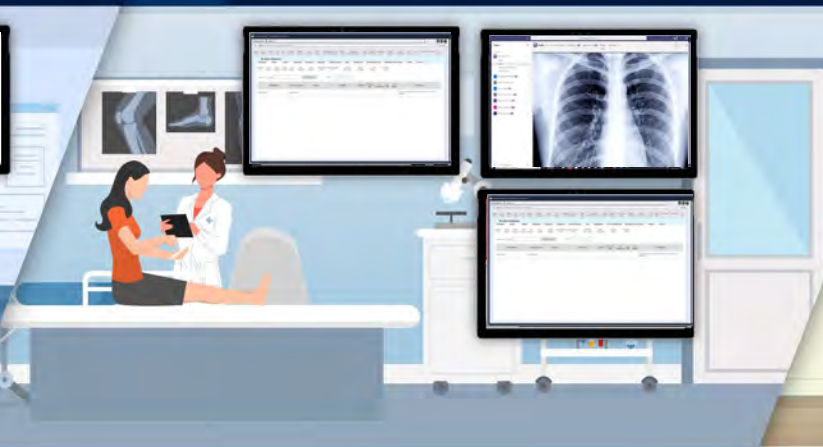
3 Tele-Health Consult



4 Acute Care Triage

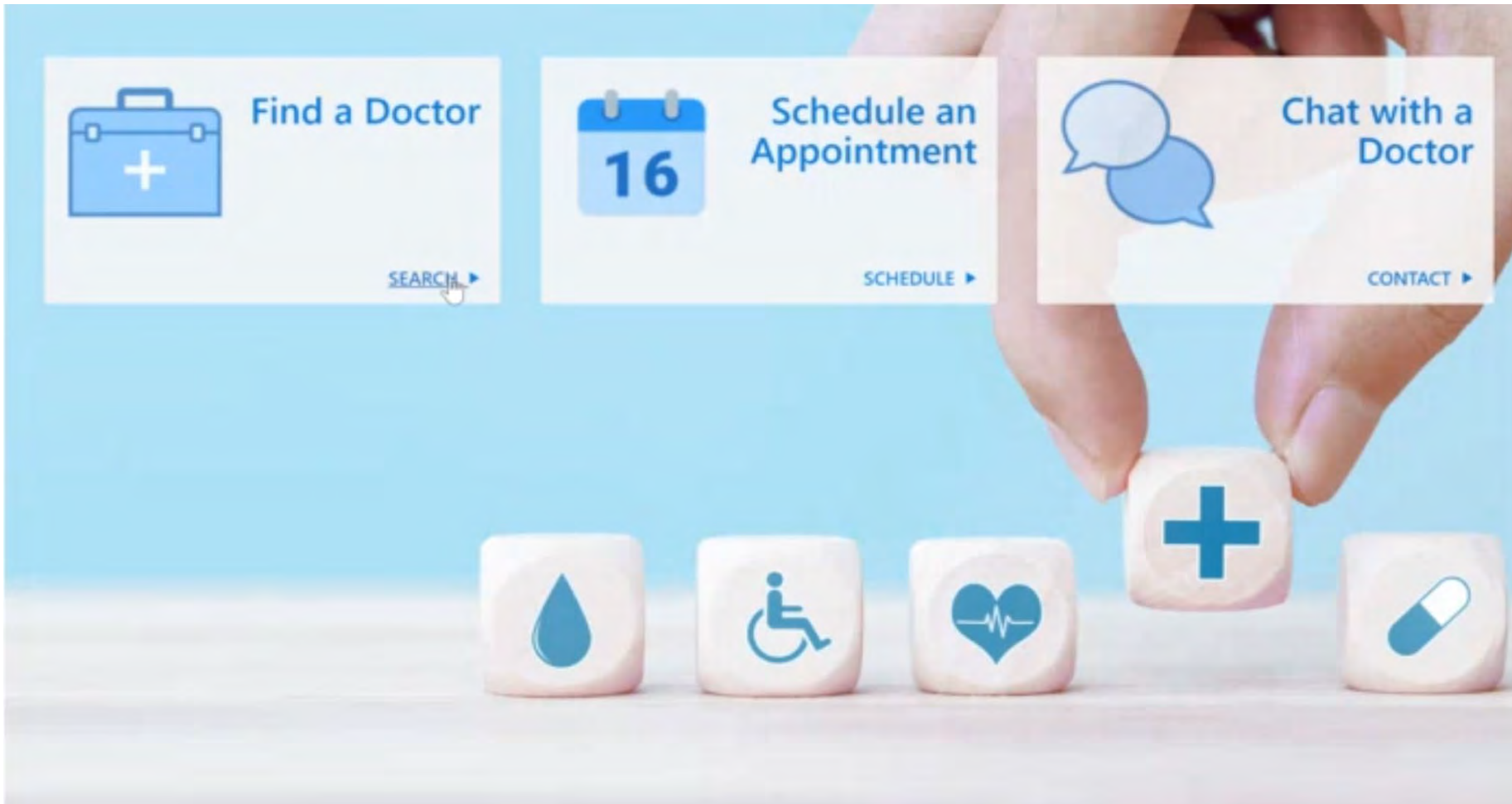


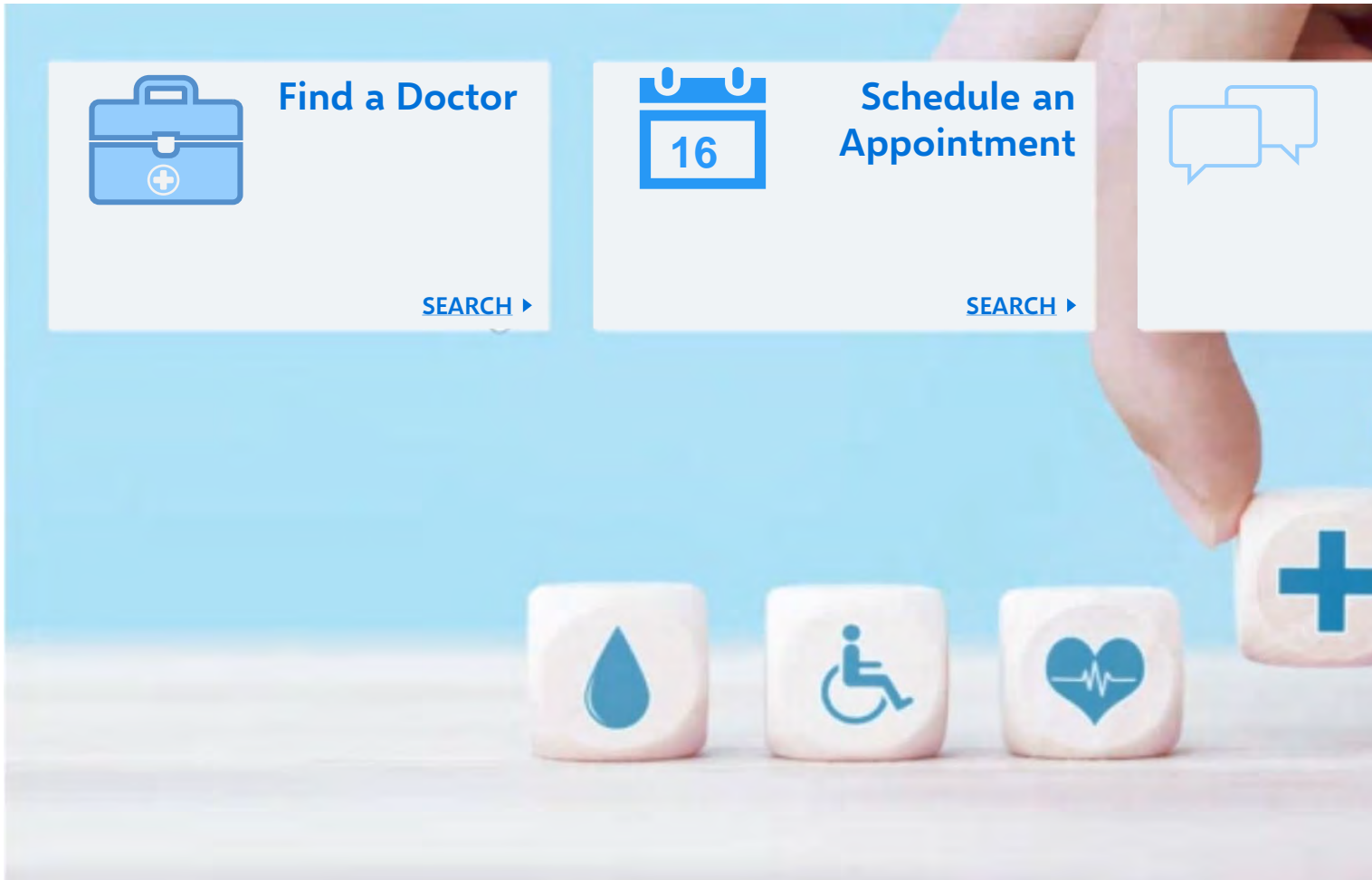
5 COPD Diagnosis and Treatment



6 Smart Assist Long-Term Follow Up







Let's Chat! [Close]

Welcome to Van Arsdel Health Cheryl. How can I help you today? To talk to a person, just say "Talk to agent"

I'm not feeling very good and have a slight fever.

How long has that been going on?

For just a few days

Any other symptoms?

Yes, I've got some swelling in my left leg. Pic is attached. [Image icon]

Type your message [Send]

Home

Cheryl Bryan

Welcome to Omnichannel for Customer Service

Quick Replies
Send templated messages for consistent communication experiences for your customer

Transfer
Reassign the conversation to another agent in your queue, or to another queue using the easy inline option

View Customer summary
Know the customer you're interacting with from the Customer 360 page. Dive deep into each section to know more details.

Notes
Capture the summary of your interaction with the customer

Customer Summary Knowledge Article... +

New Conversation
Conversation Customer summary

Case Process Active for 4 minutes

Identify (1 min) Evaluate

Summary Details Case Relationships SLA Related

Chat request from Cheryl Bryan

Comment Escalation from bot

Wait time 117 sec

Accept Reject

GENERAL INFORMATION

Patient **Cheryl Bryan**

cheryl@example.com

+(425) 555-1212

CASE INFORMATION

Case Title
HealthBot_Chat020-A7836589

Case Number
CAS-010406-8G6Y

AGENT SCRIPT

Claims Status

- > Greet Customer
- > Start Interaction
- > Schedule Tele-Health
- > Schedule Acute Care
- > Consult / Transfer to Supervisor
- > Identify Solution - KB Search

TIMELINE

Timeline

Enter a note...

TODAY

Conversation with **Healthcare Bot** on **Patient Portal** - Today 7:05 AM

Respiration related issue

Bot escalated as it has moved beyond normal protocol. Reason shortness of breath and possible associated leg swelling.

Assign Delete ...

Smart Assist

Next best action
Schedule Transportation
Schedule a transport for the customer from their source to the destination.
Send

Next best action
Schedule Appointment
Based on symptoms, please schedule a tele-health consult with a consulting nurse.
Send

CONVERSATION SUMMARY

Bot: Welcome to Van Arsdel Health Cheryl. How can I help you today? To talk to a person, just say "Talk to agent"

Cheryl: I'm not feeling very good and have a slight fever.

Bot: How long has that been going on?

Cheryl: For just a few days

Bot: Any other symptoms?

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Type your response

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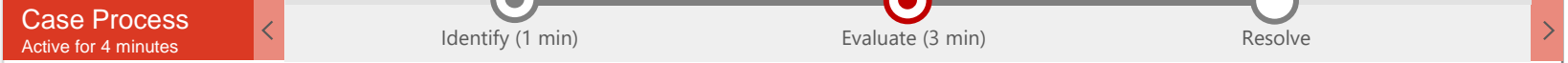
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Summary Details Case Relationships SLA Related

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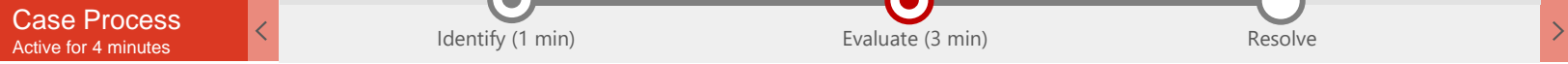
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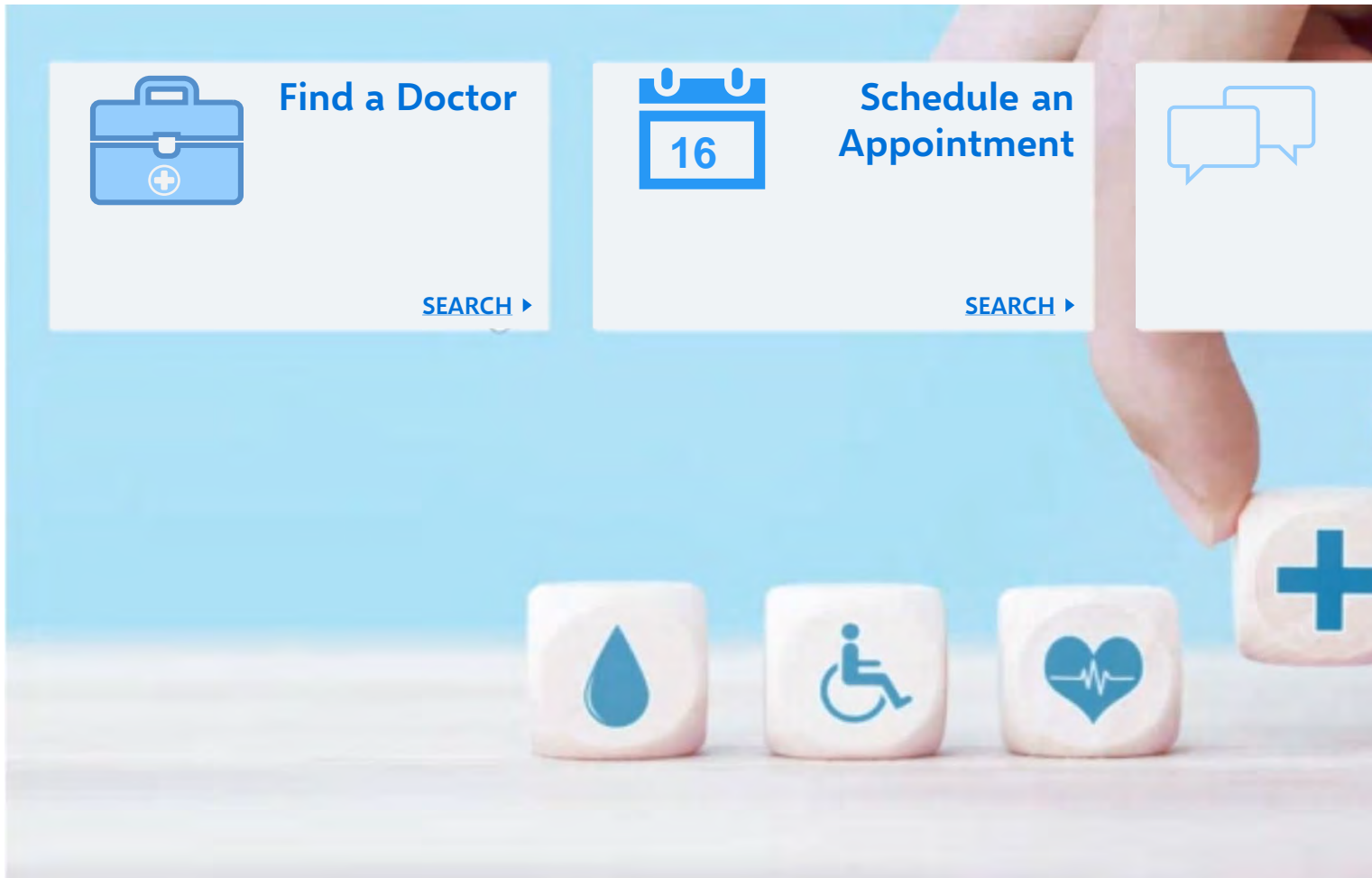
Jon (Agent): Cheryl, this is Jon, a call center agent. We should have you talk to a tele-health nurse. When are you available?

Cheryl: Anytime today.

Jon (Agent): We can get you a tele call at 9am. Is your email address still cheryl@example.com?

Cheryl: Thanks!

Type your response



Let's Chat! [Close]

Cheryl: Welcome to Van Arsdel Health Cheryl. How can I help you today? To talk to a person, just say "Talk to agent"

User: I'm not feeling very good and have a slight fever.

Cheryl: How long has that been going on?

User: For just a few days

Cheryl: Any other symptoms?

User: Yes, I've got some swelling in my left leg. Pic is attached.

Cheryl: Cheryl, this is Jon, a call center agent. We should have you talk to a tele-health nurse. When are you available?

User: Anytime today.

Cheryl: We can get you a tele call at 9am. Is your email address still cheryl@example.com?

User: Yes

Type your message [Send]

Inbox ★ Filter

van Arsdel
 Confirmed: Initial consult 9:38 PM
 Confirmed booking for Cheryl Bryan Initial c...

Confirmed: Initial consult

Cheryl Bryan

Initial consult with Eleanor Faulkner, RN



Today
9:00 AM - 9:30 AM

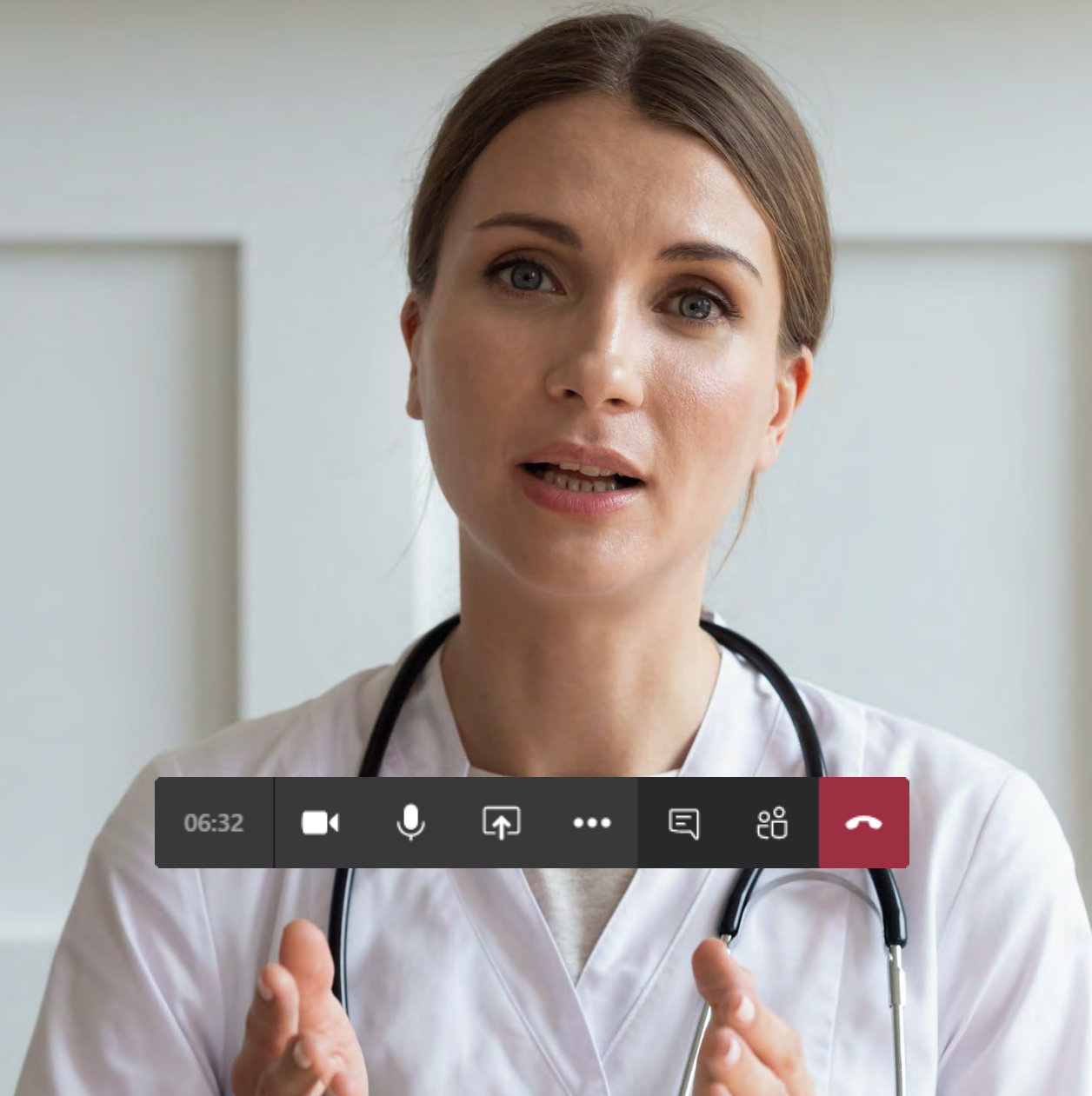
(UTC-08:00) Pacific Time (US & Canada)



Microsoft Teams Meeting



[Join Teams meeting](#)



06:32 [Video Off] [Microphone Off] [Screen Share] [More] [Chat] [Participants] [End Call]

Eleanor Faulkner, RN




Customer Insights Healthcare


Search patients


Engaged Patients

Segments


 **Ad Waeland**
Male – January 1, 1970 (50 years old)
📍 451 Jana Drive

 **Albrecht Kunze**
Male – December 5, 1981 (38 years old)
📍 466 Lotheville Alley

 **Sian Dunbar**
Female – June 17, 1943 (76 years old)
📍 4 Caliangt Point

 **Dennyon Giffon**
Male – January 25, 1974 (46 years old)
📍 3 Cherokee Crt

 **Joelly Simenet**
Female – May 18, 1996 (23 years old)
📍 83 Sunnyside Crossing

 **Cheryl Bryan**
Female – January 5, 1990 (30 years old)
📍 3326 Harper Trail



Home



Insights




Resources

Customer Insights Healthcare

Cheryl Bryan

Engaged Patients

Segments

 **Cheryl Bryan**
Female – January 5, 1990 (30 years old)
📍 3326 Harper Trail



Home



Insights



Resources



Cheryl Bryan



Summary

Dx/Rx

Home Data

Insights



Cheryl Bryan

Female – January 5, 1990 (30 years old)
📍 3326 Harper Trail

📁 Communication preference: Phone

📁 Primary physician: Jim Gadsen

📁 Next visit: 5/22/2020 – Wellness visit

Weight

120

Blood Pressure

120/80

Avg Daily Steps

10,674



Healthcare Bot chat about shortness of breath.
Tele-health consult. Refer to Acute care
Today 9:05 AM



Sick visit with Dr. Gadsen
1/11/2019 9:34 AM



Wellness visit with Dr. Gadsen
12/11/2018 1:03 PM



Home



Insights



Resources



Bryan, Cheryl

Van Arsdel
 Ht: 63 in. Wt: 135 lbs. BDA: 1.64 BMI: 25.1
 Allergies: **No Known Allergies**

30y female
 Admit Sate: Today
 Planned / Actual Discharge / Today

- Tracking Board
- Orders
- Results
- Documents
- Flowsheets
- Patient Info
- Clinical Summary
- Reporting
- Clinical Viewer
- Timeline
- CVI S
- TRUESee
- 2bPrecise
- Pedigree
- Enterprise Viewer
- Schedule View
- Insights
- Patients

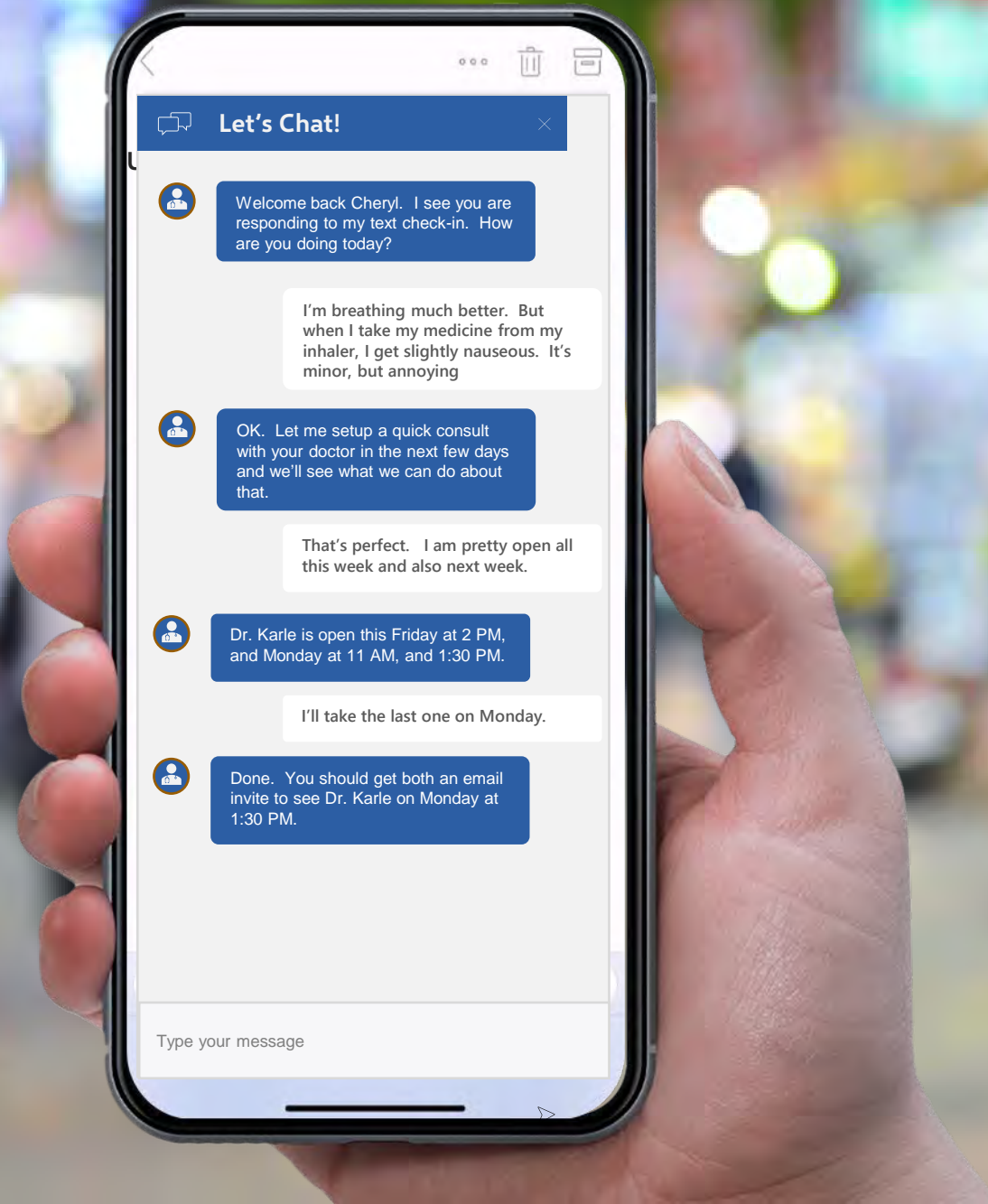
Tracking Board

Department 04. Acute Care View 1. Clinic View Filters Applied: ED

Active Patients: 6 Waiting Room: 0

Appt Date / Time	Patient	TLoc	Status	Age Sex	Schedule Reason	Portal	MA Reasons for Visit	Lab	Urine	Rad	EKG	Echo	To-Do	Physician
Today 12:00:00 PM	Bryan, Cheryl	Acute 1	Ready for PA	30y f	Tele-referral	<input checked="" type="checkbox"/>	shortness of breath, left leg swelling. Picture of swelling attached							Herriman, M
Today 11:56:15 AM	Waeland, Ad	Acute 3	Ready for MD	50y m	Reflux	<input type="checkbox"/>	Heartburn							Herriman, M
Today 11:47:23 AM	Kunze, Albrecht	Acute 4	Waiting	38y m	Ankle Swelling	<input type="checkbox"/>								Herriman, M
Today 11:30:00 AM	Dunbar, Sian	Acute 12	Ready for MD	76y f	Cough	<input type="checkbox"/>								Herriman, M
Today 11:22:56 AM	Giffon, Dennyon	Acute 7	Waiting	46y m	Cough	<input type="checkbox"/>								Herriman, M
Today 11:18:28 AM	Simenet, Joelly	LAB	Waiting	23y f	Abominal Pain	<input type="checkbox"/>								Herriman, M

- Refresh
- Settings
- Find Patient
- Add Patient
- Personnel Assignment
- Apply Shift
- Quick Launch Doc (s)
- Workflow Management
- Assign Me Physician
- Display Board



Let's Chat!

Welcome back Cheryl. I see you are responding to my text check-in. How are you doing today?

I'm breathing much better. But when I take my medicine from my inhaler, I get slightly nauseous. It's minor, but annoying

OK. Let me setup a quick consult with your doctor in the next few days and we'll see what we can do about that.

That's perfect. I am pretty open all this week and also next week.

Dr. Karle is open this Friday at 2 PM, and Monday at 11 AM, and 1:30 PM.

I'll take the last one on Monday.

Done. You should get both an email invite to see Dr. Karle on Monday at 1:30 PM.

Type your message





Additional Questions?

Carmel Wynkoop

Carmel.Wynkoop@armanino.com

Ron Present

Ron.Present@armanino.com