

Providers Edition

360 DEGREES *of* HEALTHCARE

How providers can improve the patient experience with an integrated CRM platform



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Healthcare professionals are laser-focused on improving patient outcomes, but many still depend on disparate, legacy systems including electronic health record (EHR) and lab systems and imaging applications. As they toggle between screens searching for the right information, providers lose precious face time with patients and struggle to meet patients’ expectations for personalization, engagement, and convenience.

In this guide, you’ll learn how a customer relationship management (CRM) platform can help you achieve a 360-degree view of the patient and meet their expectations. Once seen exclusively as a solution for sales teams, **Salesforce reimagined as a healthcare CRM seamlessly connects systems of record and improves visibility into the entire health journey**, enabling personalized interactions that strengthen relationships and build trust with patients.

LEARN ABOUT SALESFORCE

We bring companies and customers together by breaking down technology silos and giving everyone a single, shared view of the customer. [Learn more.](#)

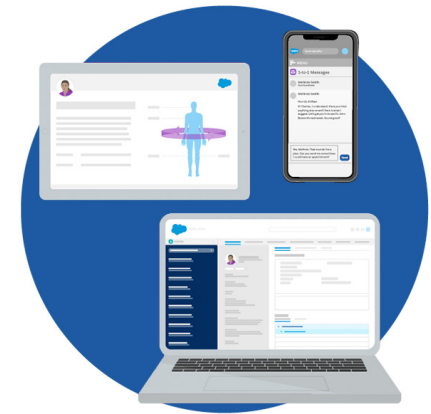
CONNECT SYSTEMS

Healthcare professionals lack a complete view of the patient's health record and are constantly switching from one system to another to find the information they need. When healthcare professionals spend time toggling between screens, they spend less time interacting with patients.

Healthcare professionals want a system that surfaces critical data and makes it actionable. **With a connected integration layer, the CRM helps providers break down barriers between disparate systems and software applications to share information across a range of sources**, including hospitals, pharmacies, laboratories, billing, and marketing. Through HL7 and FHIR standards-based application programming interfaces (APIs), a CRM pulls data from various systems to create a single view of the patient, which improves service, collaboration, and operational efficiencies.

PROVIDERS CAN ALSO ADD NEW CAPABILITIES TO THE CORE CRM PLATFORM WITH MINIMAL IT EFFORT USING EXTENSIBLE CLINICAL DATA MODELS.

- **Personalized communications:** Integrate EHRs and other systems of record to identify, segment, and deliver personalized communications to patients on their preferred channels. Patients can also take control of their experience with HIPAA-compliant self-service portals.
- **Care coordination:** Simplify collaboration among the care team with a consolidated, real-time view of patient records to give providers access to important clinical and nonclinical insights that can improve operational efficiencies.
- **Risk stratification:** With predictive analytics, providers can identify and predict which patients are at high risk for disease and proactively manage those patients with appropriate care-management programs.



Salesforce pulls data from various systems to create a single view of the patient to improve services, collaboration, and operational efficiencies.

ENHANCE PERSONALIZATION

Interactions with the healthcare system often occur at the most vulnerable times for patients. Providers must have access to comprehensive medical records to deliver the most effective, individualized treatment at those critical moments.

An integrated CRM platform consolidates all clinical and nonclinical patient information from existing systems into a single console. The rich, contextual view surfaces conditions and medications, appointment history, wearable device data, communication preferences, and social determinants of health, such as employment, finances, housing, and transportation.

With this level of visibility, healthcare professionals can deliver personalized experiences everywhere – when an agent is handling a patient inquiry or when a doctor is discussing a care plan with a patient during an appointment. **This deepens the patient-provider relationship, builds trust, and powers care decisions that translate to better health outcomes.**



Tribeca Pediatrics personalizes and automates emails to their network of 70,000 patients.

[See the case study.](#)

USE DATA INTELLIGENTLY

Healthcare providers are awash with data thanks to years of heavy investment in EHR systems. Until now, it's been unclear how to make sense of it all. An integrated CRM could be the answer. **By embedding artificial intelligence (AI) into a CRM platform, providers can extract data from disparate systems and turn insight into action.**

Within the CRM platform, data can be segmented by population to create personalized, contextualized engagement. AI can suggest the next best actions for call center staff to arrange transportation for patients at risk of missing their appointment or alert a care manager of patients falling behind on their care plan and recommend personalized outreach. Providers can assess the effects of such efforts and iterate future communications.

AI CAN BE APPLIED TO ACHIEVE A MULTITUDE OF OTHER BENEFITS, TOO:

- Surface appropriate training resources for staff education
- Help healthcare professionals anticipate issues based on patient history
- Guide call center agents to the right response to a patient inquiry with next best action recommendations



Data can be segmented by populations to **create personalized patient engagement.**

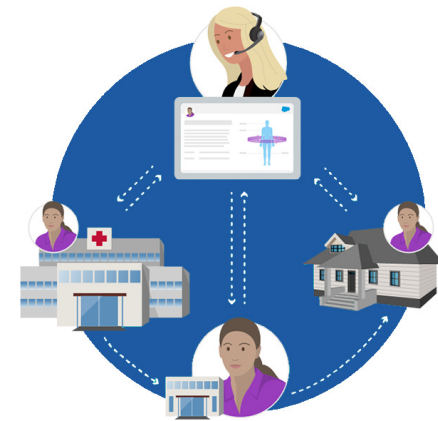
COORDINATE CARE EVERYWHERE

Collaboration among the care team is key to delivering an improved patient experience, but often data is tucked away in siloed systems, prohibiting an up-to-date patient view.

With an integrated CRM platform, users on the care team can access the latest patient information and see upcoming tasks. For example, if a patient has a complicated question and the primary doctor is unavailable, another doctor or nurse in the practice can advise without delay because of updated information in the console. If there's a next step, like a follow-up blood test, information about the test and lab location can be automatically sent to patients on their preferred channel of communication.

And if the system detects that the patient lacks access to transportation – captured as part of their social determinants of health – the provider is alerted and can help the patient arrange a ride to avoid missing the appointment.

These are the types of seamless patient experiences that encourage better adherence to care pathways and ultimately influence better health outcomes.



Salesforce connects clinical teams and caregivers for a more coordinated post-acute care experience.

ENGAGE PATIENTS ON ANY CHANNEL

Patients prefer different modes of communication. Some might like text, email, or webchat, while others want to pick up the phone or receive information through the mail.

A CRM platform can capture these preferences, so providers are always engaging patients when and how they want to be contacted. **Proactively sending messages to patients about upcoming appointments, lab results, and wellness- and disease-management programs can help improve patient satisfaction, promote care plan participation, and reduce costs.** Patient journeys can even be automated so that organ recipients or hip-replacement patients receive relevant communications at the right point along their health journey to recovery for greater engagement and adherence.

80%



of patients still schedule appointments by phone.

However, when communicating with primary care doctors to view health data, patients tend to use more modern technologies, with online portals at 35% and email at 14%.¹

¹ "The Connected Patient Report," Salesforce Research, 2017.

TRIBECA PEDIATRICS

New York City-based Tribeca Pediatrics has always taken a personalized approach to care for its 70,000 patients, but existing technology solutions prohibited a complete view across 28 offices and resulted in cumbersome processes. As growth outpaced an existing EHR solution and email volume continued to increase, Tribeca Pediatrics sought a centralized solution that lived up to the promise of patient-centered care.

SEAMLESS EHR INTEGRATION

- The EHR offloads processes to Salesforce Health Cloud, which gives greater visibility, flexibility, and automation
- If a patient visits multiple doctors within the Tribeca Pediatrics network, all details are recorded for a complete view across offices
- The automated referrals process decreases staff resources by 33% and eliminates the eight hours previously spent per week reaching out to patients and specialists

PERSONALIZED COMMUNICATIONS

- Marketing Cloud Journey Builder personalizes and automates milestone emails and visit reminders
- When a parent or caretaker calls, computer telephony integration (CTI) surfaces relevant patient information to the agent so information is only given once



“Having our referrals in Salesforce gives us a lot more visibility into the department and shows the staff that this is a really powerful tool that’s more than email management.”

LESLIE PENNYPACKER,
EXECUTIVE DIRECTOR

LET'S GET BETTER TOGETHER

There is nothing more important than health. That's why it's critical to deliver the individual attention, affordable care, personalized treatment, access to health records, and communications on any device, at any time, that healthcare consumers want, expect, and deserve.

Salesforce can help you deliver more personalized experiences, improve operational efficiency, and become more agile in a competitive industry. We do this by connecting care teams, EHR data, researchers, and many other business workflows on a single, secure digital platform.

That leads to better outcomes for your business, your employees, and your customers. Let's connect to healthcare consumers in a whole new way. [Learn more.](#)

