Transform Care Management and Consumer Engagement with Salesforce Health Cloud
Addressing Twin Challenges with Healthcare CRM

Healthcare provider and payer administrators are currently facing twin challenges. First, consumer data lives in disparate systems. Healthcare professionals are treating and communicating with consumers without a holistic view of information. This is not only inconvenient, but can have significant consequences.

Secondly, the healthcare industry is just beginning its journey in consumer centricity and engagement. It’s no secret that both provider and payer organizations must move quickly or risk losing consumers who are now often “shopping” for healthcare and healthcare insurance for the first time.

Yet, many healthcare provider and payer organizations do not have a sophisticated consumer relationship management (CRM) tool. This is poised to change: the global healthcare CRM market is expected to grow from $7.27 billion in 2017 to $28.89 billion by 2026, a compounded annual growth rate of 16.6 percent.¹

A healthcare-specific CRM tool can address both challenges that are keeping administrators up at night.

An estimated 250,000-440,000 deaths per year are attributed to medical errors, making medical errors the third leading cause of death in the United States.²

Approximately 90% of healthcare organizations say improving key elements of the consumer experience is a high priority, but only 30 percent say they have instituted tools or practices in those areas.³

“With a healthcare CRM tool...

**HEALTHCARE PROFESSIONAL**

I can access a 360-degree view of the entire consumer population I serve."

AI-based guidance helps me identify the next best actions for each consumer I am responsible for.”

I can access holistic views on each individual’s demographic and clinical care data.”

Previously disparate systems are integrated to give me a single source of truth.”

**CONSUMER**

I am confident that my healthcare team is up-to-date with my latest care and insurance information.”

I receive proactive communication from my healthcare provider or insurance company at the frequency I want and via my preferred channel.”

I am empowered to participate in and advocate for my own healthcare - I can book my own appointments, see my claims, etc.”

¹ Statistics Market Research Consulting, Healthcare CRM - Global Market Outlook (2017-2026), December 2018
² John Hopkins, Medical Error - the Third Leading Cause of Death in the US, May 3, 2016
³ KaufmanHall, 2017 State of Consumerism in Healthcare
CRM designed for the healthcare industry

Salesforce Health Cloud is the world’s number one CRM platform tailored specifically for the healthcare industry, offering a complete view of the consumer, intelligent care management, and connected, collaborative experiences. It integrates data sources from the healthcare ecosystem, including electronic medical records (EMRs), scheduling systems, physician credentialing solutions, patient portals, member portals, enrollment engines, and membership databases. Health Cloud also helps transcend functional silos within healthcare organizations and allows for improved integration across care delivery, customer service, and customer acquisition/retention teams.

Health Cloud can be integrated with other Salesforce Clouds to transform the way healthcare organizations interact with consumers across the entire relationship lifecycle:

**Acquire:** Marketing Cloud tracks opportunity pipeline

**Service:** Service Cloud empowers agents to take calls, chats, and create and respond to cases

**Engage:** Marketing Cloud allows organizations to send targeted communications directly to consumers via channels including email, text, and social media

**Innovate:** With Community Cloud, healthcare organizations can create patient or member portals to empower consumers to participate in their own healthcare, or a physician portal for caregivers to collaborate internally

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47% of consumers believe the healthcare and life sciences industries are more focused on industry needs than patient needs.

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- Salesforce, Connected Healthcare Consumer Report, November 2019
Health Cloud for providers: Closing gaps along the patient journey

Salesforce Health Cloud makes connections between disparate data residing in multiple clinical, scheduling, marketing, and billing solutions. It establishes a singular, 360-degree view of each patient that can be drilled down to help employees throughout the organization support patients at each point of contact. For example:

**Customer service desk agents** can pull up a single screen with all the relevant patient data from multiple data sources as a call or chat from a patient comes in. This allows agents to more efficiently handle incoming calls, quickly help patients resolve billing inquiries, refill requests, scheduling requests, pre-registration inquiries, etc. The first call resolution rate is improved.

**Marketers** can access AI-powered proactive recommendations for patients, turning every interaction into an opportunity to increase patient satisfaction, and provide healthcare education and tips.

**Care managers** can see their assigned patients and prioritized tasks, and review rich, contextual information on each patient. This allows them to determine and drive the next best action based on clinical disposition. For example, when a patient is discharged from the emergency room, outgoing calls or text messages can be sent with follow up instructions.

Second, with integration of Health Cloud and additional data sources, physician liaisons can see in- and out-of network physicians, and develop plans to segment and target physicians.

Third, executive leadership teams are able to set more informed targets around things like increasing annual visits or increasing compliance with clinically prescribed follow up visits or medications.
Health Cloud also improves the patient experience. Patients realize less communication fatigue as messages coming from their providers are coordinated and informed. Health Cloud also generates insights to help providers guide patients on a personalized journey that maximizes potential for positive health outcomes.

Here is what a connected patient journey might look like for an expecting mother:

**ATTRACT**
An expecting mother is looking for a new obstetrician. You want to highlight your organization’s world class services and facilities.

**SERVE**
She’s joined your healthcare organization and now needs support along her journey.

**ENGAGE**
Now it’s time to deliver the right personalized content (what to expect at OB visits, nutrition recommendations, setting up a nursery, etc.) at the right time throughout her pregnancy and beyond.

**INNOVATE**
Your organization can expand the relationship with the new mother by offering online classes, in-person events, etc.

**TAKE THE BURDEN OFF THE CONSUMER**
60% of consumers have had to manage their care between different parties.

– Salesforce, Connected Healthcare Consumer Report, November 2019
PURSUING GROWTH WITH HEALTH CLOUD AND MARKETING CLOUD

PwC worked with a Fortune 500 health plan serving individuals and families covered by government programs to implement a solution that would allow for the pursuit of aggressive growth targets.

We designed, developed, and delivered a Salesforce Health Cloud and Marketing Cloud solution in under five months that redesigns the prospect and member journey across the awareness, acquisition, lead nurturing, management, and conversion stages. It also has a sales attribution model to track sales conversions tied to marketing campaigns.

The solution was successfully adopted by telesales, broker support, and field service associates, and was leveraged during the 2019 open enrollment period. The integration between Health Cloud and Marketing Cloud allows the client to nurture personalized campaigns through a preference center, and trigger behavioral-based campaigns leveraging member 360 data.

Health Cloud for payers: Reimagined CRM for health plans

Now more than ever, people have purchasing power when it comes to selecting a health plan. Salesforce Health Cloud helps health plans work smarter to acquire new members and keep the members they have.

Guided workflows are available to assist employees in delivering personalized service during every interaction with a member. For example:

- **Membership service representatives** can easily support members in the enrollment or re-enrollment process.
- **Customer service desk agents** can see all the right information at the right time to resolve everything from simple tasks like adding or removing a member to a plan, to more complex issues like supporting appeals and grievances cases. These interactions can take place across any channel and any device based on member preference.
Health Cloud also improves the member experience. Payers can create highly personalized and connected journeys for members, overcoming barriers to care while increasing access to clinical and support services.

Nearly 3 out of 4 Americans (72%) say it’s important that their health insurance providers use modern tools such as live chat and two-way video when communicating with them.

- Salesforce, Connected Healthcare Consumer Report, November 2019

Here is what a connected member journey might look like for a father searching for a new health plan for his family:

**ATTRACT**

A father submits an online form requesting more information about health plan options for himself, his wife and their two young children. An agent captures his information, calls him to set up a consultation appointment, and promises to send information to review via email.

**SERVE**

A 360-degree view is created for him and each of his family members as he onboards to his new health plan; a care manager creates a personalized health plan for his young son who has a chronic illness.

**ENGAGE**

He calls his health plan following an unexpected trip to urgent care. The agent already has the pertinent information about the visit allowing for an informed, productive conversation.

**INNOVATE**

Health Cloud provides an opportunity to engage members at the right time on the right channel with personalized, relevant content to motivate healthy behavior.
Enable your future with Health Cloud and PwC

PwC has the expertise to guide your Health Cloud implementation whether you are upgrading to Health Cloud from an existing Salesforce platform or migrating from a legacy system. Our proven approach will enable a seamless journey toward streamlined care coordination, and help you put every consumer at the center of the care system.

Assess and advise: during this phase, we will investigate the key pain points within your current solution and solidify the goals of a Health Cloud implementation. We’ll also begin to share advice based on our deep understanding and experience with Health Cloud, and assess the impact and complexity of a migration.

Roadmap development: based on the assessment, we’ll create a detailed transformation roadmap and suggested implementation options.

Implementation: our team of specialists will execute on the roadmap. Healthcare organizations that have a low complexity rating coming out of the assessment could be up and running quickly on Health Cloud.

The Salesforce specialists at PwC can guide you through your Health Cloud transformation with our proprietary toolkit developed in coordination with Salesforce and proven with our clients.

**WE CAN HELP YOU ACHIEVE GOALS INCLUDING:**

- Increased compliance with annual wellness programs (e.g. annual visits, prostate exams, mammography screens, etc.)
- Increased patient satisfaction scores
- Decreased overall IT expenditures on disparate systems
LET’S DO THIS TOGETHER

When it comes to digital transformation in healthcare, the team at PwC excels with years of experience in custom Salesforce implementation and extensive industry knowledge.

To learn more about upgrading to Health Cloud, please visit: pwc.com/salesforce

Ready to get started? Contact:

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