

# Scaling population health programs with automation.

A step-by-step guide.

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## Meet the new healthcare consumer

Meet Maria. Maria is a typical American healthcare consumer. Probably like you, she's glued to her smartphone day and night. At work, she spends most of her day on a computer, checking email many times each hour. At night, she watches TV while browsing the Internet on her tablet.

**She's connected.** And because she's constantly connected, she expects the companies she patronizes to be connected too. If her checking account gets low, she wants her bank to tell her so. If her flight is changed, she wants to hear it from her airline before she heads to the airport. And as a connected consumer, Maria wants these reminders via the channels she uses everyday—text, smartphone push, email and other mobile channels.

### Why is Maria's story so important to your organization?

Something you may not know about Maria is that she has type II diabetes. She's one of the millions of Americans managing a chronic condition — conditions that account for more than 75% of the money we spend on healthcare each year.

Just as she expects an overdraft reminder from her bank, she expects reminders and guidance from the healthcare organizations that have an interest in her well-being, including her providers and her health plan.

When it's time to refill a prescription, schedule an important screening, or submit key health data, she wants a proactive nudge from you.

The good news? Many organizations are finding that automating elements of their population health management programs not only helps to improve health outcomes but also allows them to serve a wider group of consumers at a lower cost.

But how do you implement, optimize and scale automated outreach to better serve members?

Here, we give you a step-by-step blueprint for success.

# 75%

of health care costs are due to chronic conditions.\*

\*Source: <http://www.cdc.gov/chronicdisease/>

## Scaling Population Health Programs

The healthcare industry is undergoing a massive paradigm shift in the way it approaches patient care. In years past, healthcare organizations were focused on single episodes of care. A patient reported a pain or illness and received treatment.

Today, it is no longer enough to treat patients only when they're sick. Today's population health management approach means implementing programs that enable prevention, deliver help for the chronically ill, and support outpatient care over the long term.

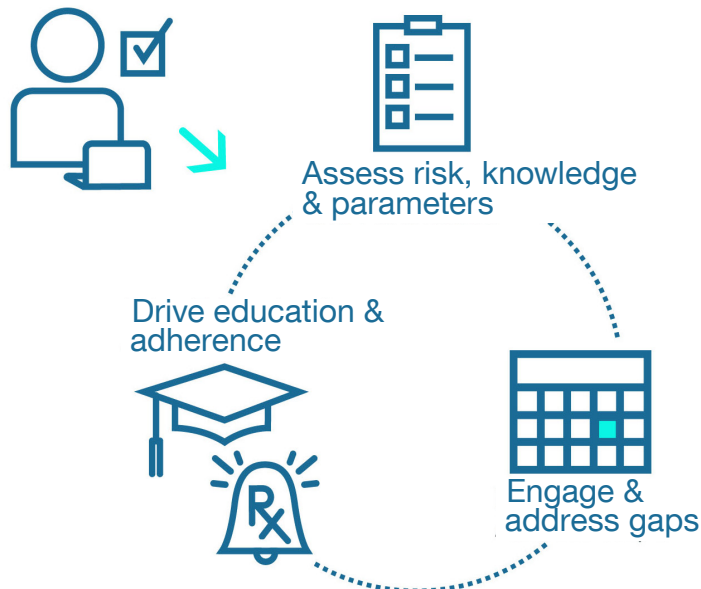
We've found that the most effective population health programs leverage automated, HIPAA-compliant outreach—voice, text, email, etc. —to proactively engage with members during the following stages of care:

- **Reach & enroll.** The initial outreach to engage and recruit members to appropriate health management programs.
- **Assess risk & parameters.** The ongoing process of determining a member's health risk, treatment knowledge, and clinical parameters.
- **Engage & address gaps.** Proactive efforts to help members reduce future complications by changing behavior or better managing chronic conditions.
- **Drive education & adherence.** Outreach designed to inform and help members adhere to programs and avoid more serious conditions.

# 65%

of healthcare consumers are interested in receiving reminders from their doctors or healthcare providers for services such as annual flu shots, cancer screenings and recommended tests.\*

### Reach & enroll



### 4 stages of care that benefit from automation outreach

## About The Guide

This guide is designed to help you add, or optimize, automated member outreach in order to cost-effectively scale your programs and improve health outcomes.

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### Navigating the guide

We've provided suggestions and best practices for optimizing automated outreach based on three stages of adoption.

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**Getting Started:** It's early in the process of automating your outreach.

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**Ramping Up:** Basic automation is in place and it's time to extend.

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**Optimizing:** Outreach is automated across key programs. It's time to expand channels and maximize the return of your efforts.

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# 67%

of patients say they would likely submit key health measurements through a smartphone app, text, email, automated voice or web survey.\*

Before we dive into the guide, let's first get to know Maria better. Before her health plan and provider implemented automated proactive outreach, she was struggling to manage her chronic condition.

Like most of us, Maria is busy. Work obligations and the fast pace of modern life keep her running breathless between responsibilities. So before outreach from her health plan became more frequent, care for her chronic condition would often fall by the wayside.

Required check-ups would frequently go unscheduled, and prescribed medications would sit untaken. Take-out was her food of choice, and exercise was a long-abandoned practice.

Her weight and blood pressure were increasing, she was hypoglycemic, and she was on the verge of renal failure. Her condition was getting downright dangerous, and she was just too busy to keep up.

That is until one day when Maria received a friendly interactive voice message from her health plan—the gentle nudge she needed.

**“Hi Maria. This is Paladin Healthcare calling to offer a personal support program to help you live a healthier life. People who participate in this program are able to better manage their chronic conditions...”**

## Reach & enroll

Leveraging automation in the enrollment process will help you boost results by cost-effectively reaching a larger number of members in a shorter period of time.

### Getting started

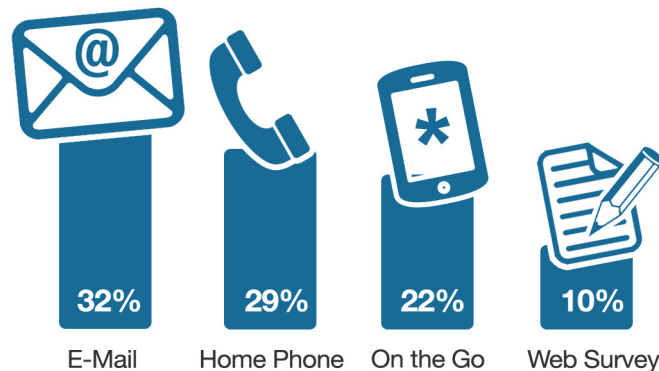
If you are just beginning to introduce automated outreach into your enrollment process, begin with a narrow focus on enrolling a population with an addressable condition, such as diabetes or congestive heart failure. This will allow you to more easily measure and assess the impact of automating your outreach.

# 70%

more non-white patients prefer texting than white patients, while 49% of Medicare beneficiaries want email communications.\*

Having selected a target population, you can begin to consider the best channels—voice, email, text message, smart phone app, social media, etc.—for reaching and engaging them. To increase your enrollment rates, you'll want to use channels that will successfully supplement your current communication strategy and align with member preferences.

### Preferred Channels for Sending Health Measurement Data



For example, traditional enrollment campaigns typically involve mailing materials to identified candidates. With automation, you might consider adding an automated voice message or email to let members know to expect materials or as a follow-up after they've been mailed. Two leading population health companies implemented a similar multi-channel approach and saw enrollment increase by 500% over non-automated programs.

When identifying the channels you'll use, remember to keep your members' preferences in mind. Engaging patients through the channel they prefer will increase engagement as well as effectiveness. Research shows that patients exhibit commonalities in channel preference by age, gender, geography, race and income subsets. For example, when it comes to communications from providers, 70% more non-white patients prefer texting than white patients, while 49% of Medicare beneficiaries want email communications.

To maximize engagement, make sure you're reaching members where they want to be reached.

**Ramping up**

Expanding the use of mobile channels, including text messaging and smart phone push notifications, and personalizing your messages are two strategies for enhancing the effectiveness of your outreach.

Increasingly, consumers want to receive service-related reminders and notifications on their mobile devices. A study by Wakefield Research found that an equal number of consumers prefer this type of communication via text or calls to their mobile phones as those who prefer outreach to their home phones. And more than 30% of millennials—those born between 1980 and the early 2000s — prefer text messages over any other method of communication.

Outreach to mobile devices is federally regulated and requires express consent from your members before you call or text them. To successfully comply, it is critical to be able to discern between mobile and landline numbers and have a strategy for gaining consent. If you don't currently have these capabilities, an experienced automated outreach vendor should be able to assist you.

The quality of your outbound voice messages and the level of personalization you employ will humanize the automation and increase engagement.

We strongly recommend using professional voice talent to properly convey your brand. On any channel, a personalized message will feel more authentic and carry more credibility. For example, Maria frequently receives calls and emails from her health plan that use her name and provide specific personalized messaging.

Through an innovative partnership with Maria's provider, her health plan reminds her that, "Dr. Richardson wants you to schedule your next eye exam."

When Maria sees these personalized messages she feels as though her health plan is truly looking out for her best interests, and it increases her engagement.

**Optimizing**

To further improve your engagement rates, regularly tune your communication strategy. While it's tempting to "set and forget" the timing and content of your outreach, you'll drive improved results by continuously adjusting your channel mix and the length and phrasing of your messages.

Consider implementing asymmetric calling cycles. By varying your communications by day of the week and time of the day, you can optimize your campaigns to maximize responses. A sophisticated proactive engagement vendor will have established best practices to share and be able to provide you with analytic tools to determine what works best for your programs and members.

For example, an optimal enrollment strategy initiates engagement with an automated call before the enrollment packet arrives in the mail. This practice cost-effectively engages those members who are most open to enrollment, allowing you to appropriately target a multi-channel campaign to those who need more education. A possible outreach strategy might include an automated pre-mailing call, a mailing, a live agent follow-up call and an automated "unable to reach call", if needed.

# 30%

of millennials - those born between 1980 and the early 2000s - prefer text messages over any other channel.\*

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**Best-Practice:** Remember that phone numbers change far less frequently than email addresses. Consider reaching your members via automated voice or text to ensure they get your messages.

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## Assess risk, knowledge and parameters

Current information on the health of your member population empowers care managers to efficiently reinforce new behaviors and intervene as necessary.

Automated assessments streamline essential data collection on topics from health risk to medication adherence and ensure you're aware of important changes in your members' health.

### Getting started

If you're not yet delivering automated assessments, you'll want to begin by determining which assessments make sense for your organization.

The assessments available to leverage are many and may include:

- Chronic Member Knowledge
- Chronic Clinical Parameter
- Chronic Treatment/Program Adherence
- Medication Adherence
- Satisfaction with Health Coach, Nurse or Program
- Health Risk
- Post-discharge/Readmission Reduction

Automating health risk assessments is often a great place to start.

Consider delivering assessments via automated voice, email, text or smartphone application, depending upon your targeted segment and their preferred outreach channels.

Utilizing automated assessments, you can determine which members are candidates for wellness or disease management programs, which enrollees need intervention and which members are successfully managing their health themselves.

Armed with this knowledge, you can then scale expensive resources such as nurses and health coaches by assigning them only when necessary.

For example, because of Maria's answers to medication adherence assessments, her health coach has regularly made adherence an area of discussion during their monthly phone calls.

# 67%

of patients say they would likely submit key health measurements through a smartphone app, text, email, automated voice or web survey.\*



**Ramping up**

When expanding your assessment efforts, analyze your channels to improve completion rates. The key concept here: reach your members where they want to be reached. Specifically, using text, smartphone push, or other interactive mediums that are likely to boost engagement. The most effective programs we've seen utilize a cross-channel approach that makes responding and engaging easy and effortless.

For example, consider sending a text message with a link to a web-based assessment or prompting engagement with a voice-based assessment through automated outreach to mobile phones.

Another widely-used assessment application is the automated collection of key health measurement data, or clinical parameters. This also allows you to routinely monitor your members' progress, without requiring time-consuming and costly trips to the doctor. It will also allow your organization to scale expensive resources such as nurses and health coaches by allocating their time only where they are most needed, such as complex, co-morbid and high-utilizing members.

**Optimizing**

In order to enhance the utility of the information gathered through assessments, be sure that you are preparing your system of record to consume your data. Otherwise you risk letting all the data you've worked so hard to collect languish in hard-to-use files.

When Maria's health plan started with assessments, her responses were being stored in spreadsheets, rather than frequently accessed information systems, and as a result, they often went unused by the care management team. Maria eventually stopped responding to the assessments.

Since then, her health plan has integrated their assessment applications with their medical management system so that nurses have easy access to the response data and use it as talking points in their appointments with chronic members. Maria has since started to respond to the assessment applications once again.

# 17%

of patients want text messages from their doctor or healthcare provider. However, only 9% of patients receive text messages today.\*

## Engage and address gaps and problems

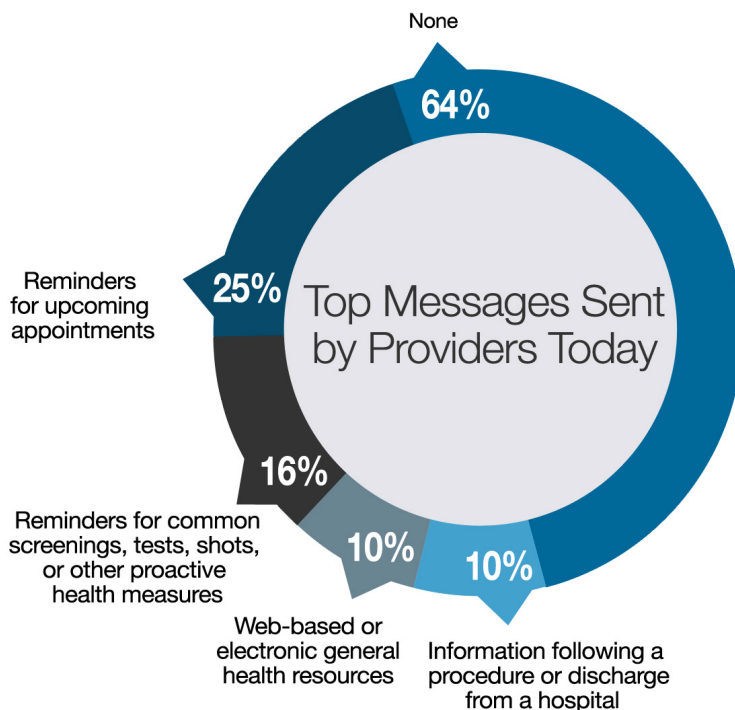
An effective population health management program will include communications that drive engagement program protocols as well as continually address any gaps in care.

Automated outreach can be used to deliver many of these messages simply, and cost-effectively.

78%

of the members enrolled in health and wellness programs forgot to schedule a preventive or wellness appointment in the past 12 months.\*

**Missed opportunities:** While patients readily engage with a range of communications, many healthcare organizations fail to reach out.



### Getting started

One of the fastest-growing uses of automation is to help members remember key tests and screenings. According to a study by Wakefield Research, 78% of the members enrolled in health and wellness programs forgot to schedule a preventive or wellness appointment in the past 12 months.

Proactively reminding members to schedule quality-related screenings and treatments can provide a significant lift in outcomes.

When determining where to automate reminders, take care to choose services that will be significantly impacted. For example, proactive outreach is highly likely to increase participation in breast cancer screenings but have little impact on participation in fall risk assessments.

\*Source: Wakefield Research

### Ramping Up

As you begin to expand your use of automation, consider targeting communication around specific measure sets for improvement. We recommend reviewing your line of business mix, as this may point you toward a specific program like Medicare Star or HEDIS.

To further drive engagement, you can also implement more sophisticated messaging to educate members about why these services are important.

Not all members will believe that a particular service, be it a flu shot or cancer screening, is of value. Consider using an email, text or automated voice communication that includes an initial statement of importance, with an option to hear or see more information from a credible source.

For example, Maria was dismissive of the importance of eye exams until she heard an explanation of their importance through an automated voice application.

### Optimizing

As your quality improvement programs gain traction, you'll want to optimize your outreach to ensure maximum engagement and ROI.

Begin by leveraging data to optimize your efforts. We recommend relying on claims and/or encounter data to narrow your recipient lists. This will ensure your communications are relevant. Where possible, avoid sending out a "blanket" reminder to members about specialized tests or screenings.

When Maria hears or sees "according to our records you are due for a foot exam" and she knows it's accurate, it elevates her trust in the reminder messages.

In all your outreach, remember to use channels and applications that make it is easy for members to schedule appointments then and there. Consider minimizing use of postcards or automated reminders that don't include options for immediate engagement. If you are partnering with a provider who can make it possible to directly schedule services with a clinician, consider providing an "agent transfer" option.

If you choose to provide an "agent transfer" option, you'll want to work to establish agent-transfer best practices. When reaching out for the purpose of enrollment, allowing candidates to transfer to an agent or enrollment specialist can be an extremely effective tactic—but only if properly implemented.

Outreach via text message or smartphone app should include a hyperlink or "clickable" phone number that empowers the member to take the appropriate next steps. This will maximize the value of your communications and ensure a higher response.

Consider stratifying member outreach and response according to acuity—a sophisticated automation vendor will have a logic-based application that can automate this process and transfer members according to their level of risk.

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The most cited reason for non-adherence: **forgetfulness\***

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## Drive education and adherence

As the old adage goes, knowledge is power. If your population is educated about their treatment plans and understands what constitutes healthy choices, they are more likely to adhere to their treatments and make good decisions in their everyday lives.

### Getting started

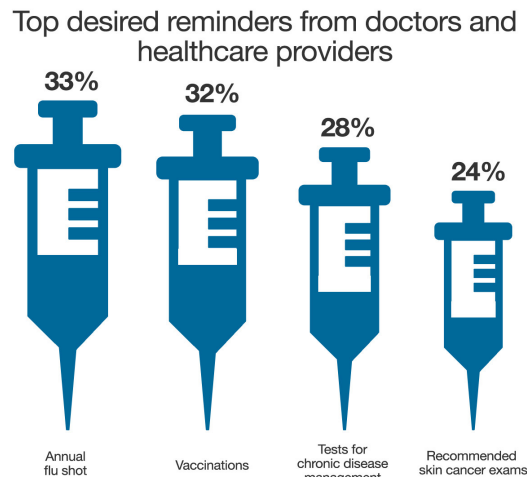
Among the simplest and most valuable adherence processes to automate are appointment reminders with health coaches and nurses. These are valuable, expensive resources and when appointments with them are missed, it not only means that members fail to receive the guidance they need, it also means your staff's time isn't being monetized. Use automated outreach, such as an automated voice or text message to confirm members' attendance.

When crafting your messages, consider integrating links and other response mechanisms so that members can cancel or reschedule as needed.

# 33%

of patients would like to receive annual flu shot reminders from their healthcare provider. They would also like reminders for vaccinations, tests for chronic disease management, and recommended skin cancer exams.\*

Like many people, Maria's work schedule changes frequently. Before receiving automated reminders, she would frequently forget to let her health coach know when she was going to miss an appointment. She's now prompted to confirm or reschedule through her health plan's reminders.



**Ramping up**

In addition to appointment reminders, automated prescription refill reminders are an effective way to increase adherence and improve health outcomes.

Some health plans even choose to include complex applications such as brand-to-generic conversion, retail-to-mail conversion and temperature-sensitive medication delivery confirmation. Work with your PBM to ensure they have the capabilities to support this.

**Optimizing**

Utilizing the data you've collected in your assessments, you can take your coaching to the next level by delivering just-in-time content such as nutrition tips, healthy recipes or reminders to exercise.

“Instant information” channels such as text and smartphone push notifications are perfect for delivering value-added information and reminders to help members maintain their health despite their busy schedules.

## Next steps to expand your use of automation

It is clear that healthcare organizations are experiencing a significant shift in how they serve their members.

Today's healthcare consumer is a proactive, connected consumer. It is no longer enough to treat your members when they are sick. You must provide them with the resources they need to be stewards of their own health.

As healthcare costs continue to rise, and consumer demand for proactive outreach increases, automated member engagement will be one of the few ways healthcare organizations – whether a payer, population health manager, pharmacy benefit manager or provider -- can scale their business to stay competitive.

But this is good news.

Because when properly implemented, proactive outreach will help your organization lower costs, improve health outcomes, and increase loyalty among members.

Consider Maria. Today she's in her best health in years. Thanks to supportive reminders from her health plan, Maria eats healthy and exercises on a regular basis. She frequently tests her blood glucose levels, and always takes her prescribed medications. In addition, she hasn't missed an eye or foot exam in a long time.

To get started helping your Marias, email all the stakeholders that will be involved with your automation initiatives, and set a meeting to discuss how the use of automated outreach should be expanded within your organization. The members of your organization, and community, will thank you.

**To learn how other plans are using automation or get access to additional resources such as sample business cases, [contact us today](#).**

### About proactive engagement

Nuance works with the nation's leading brands, improving the reach and effectiveness of their customer service and collections campaigns. We deliver results by blending the scalability and efficiency of cloud-based automation with sophisticated personalization based on known preferences and previous response patterns. Orchestrating the use of channels most preferred by consumers – voice, text, email, mobile application and live agent– further ensures cost-effective results. Fortune 500 companies who build loyalty based on their service, trust Nuance to proactively engage one in five Americans each year with the right information at the right time. Follow us on Twitter: @NuanceEnt

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**About Nuance Communications, Inc.**

Nuance Communications is reinventing the relationship between people and technology. Through its voice and language offerings, the company is creating a more human conversation with the many systems, devices, electronics, apps and service around us. Every day, millions of people and thousands of businesses experience Nuance through intelligent systems that can listen, understand, learn and adapt to your live and your work. For more information, please visit [nuance.com](http://nuance.com)

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