

**CHIME<sup>®</sup> 22**  
**FALL FORUM**  
30TH ANNIVERSARY

**Transforming patient experiences  
with a CRM strategy**

The Geisinger Experience

John Kravitz  
Paddy Padmanabhan

Nov 9, 2022





**SPEAKER**

---

**JOHN  
KRAVITZ**

MHA, CHCIO

V.P. Strategic Business Development, Workday

Former CIO, Geisinger Health





**SPEAKER**

---

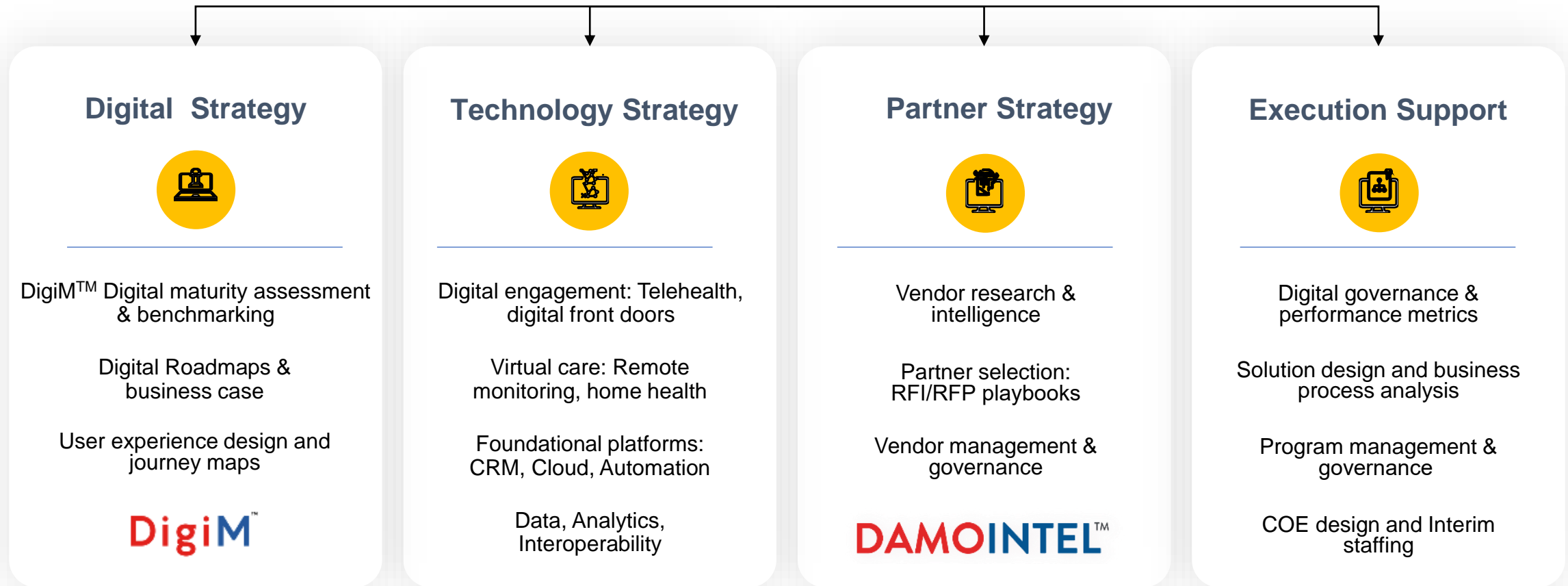
**PADDY  
PADMANABHAN**

MBA, CPHIMS

CEO, DAMO CONSULTING

# Damo: Digital Transformation Advisory: Built On Deep Healthcare + Technology Expertise

## Digital Transformation Advisory



# Geisinger: Integrated Health System, \$ 8.8 Bn in revenues



*We care for patients.*

- 10 hospital campuses
- 125 clinic sites
- 26,000 employees
- 1,677 employed physicians



Geisinger Hospital Sites  
Geisinger Bloomsburg Hospital  
Geisinger Community Medical Center  
Geisinger James Street Hospital  
Geisinger Lehigh Valley Hospital  
Geisinger Medical Center  
Geisinger Shamokin Area Community Hospital

Outpatient Clinics  
Woodbine Geisinger Woodbine  
Gray's Woods Geisinger Gray's Woods



*We provide quality, affordable healthcare coverage.*

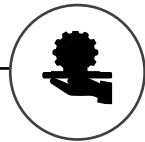
- 550,000 members
- 29,000 contracted providers
- 100+ hospitals in network



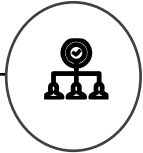
*We teach, research and innovate.*

- 582 MBS/MD students at GCSOM
- 51 GLH School of Nursing, 2,300+ other nursing students
- 569 residents/fellows
- 1,000+ active research projects

# The Geisinger CRM Journey: 2019 to date



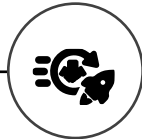
Operationalized COE in a very short time, onboarded skilled SF architects and consultants, set up cross-functional stakeholder groups



Established operational oversight, governance and management, business liaison and leadership, vendor management



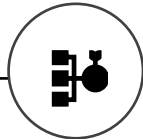
Developed 3-year CRM strategy and roadmap for enterprise, identified CRM priorities, business case and dependencies, designed an org model and governance framework



Technology strategy for unified customer data, platform integrations, marketing campaigns: SFMC, Health Cloud, Epic Cheers



Vendor management and governance, vendor selection, multi-vendor impact assessment, vendor governance framework, contract negotiations



Data strategy and governance, security/privacy compliance, unified patient/member data strategy

**Building a strong CRM foundation for health system and health plan**



# CRM Guiding Principles

Business strategy and objectives to drive CRM priorities

Shift from technology focus to business focus: business-led, IT-enabled

Establish alignment across stakeholder groups

Build a strong technology foundation for scale and growth

Create and prioritize business value

Drive increased Salesforce platform usage for lower unit costs



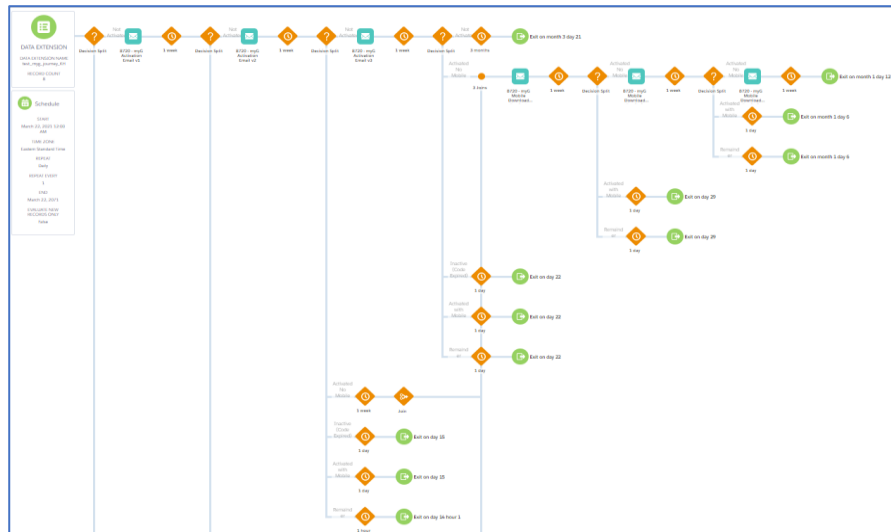
# CRM alignment to enterprise strategic goals

Strategic Priorities	Strategic Objectives	CRM Initiatives
<p><b>Operational Excellence</b> Achieving continuous improvement among measures of organizational health</p>	Patients and members	<ul style="list-style-type: none"> <li>• Patient &amp; Member Marketing Campaigns</li> <li>• Patient Contact Center Transformation</li> <li>• Patient/Member communication preferences</li> <li>• Health Plan Sales Operations</li> <li>• Health Plan: Broker Partner Portal</li> <li>• Employer Service portal</li> </ul>
	Quality	
	Geisinger family	
	Market leadership	
	Financial health	
<p><b>Managing Total Health</b> Growing our share of risk membership and enhancing our ability to manage the at-risk population</p>	Grow the number of “at-risk” lives, especially Medicare Advantage	
	Achieve well-managed utilization benchmarks	
<p><b>Access and Ease of Use</b> Putting the consumer first by delivering the access, convenience and coordination they desire</p>	Achieve best in class access to primary and specialty care	
	Bring healthcare to the consumer (e.g., digital front door, mail-order pharmacy)	



# Marketing CRM

Objectives	End Users	Use Cases	Results
<ul style="list-style-type: none"> <li>Drive market share growth and customer retention through multi-channel digital campaigns.</li> <li>Create an analytics platform connecting all customer touchpoints to build a 360-degree view of the customer</li> </ul>	<ul style="list-style-type: none"> <li>Internal users – digital marketing and analytics teams</li> <li>Patients and health plan members who interact through forms embedded on the website.</li> </ul>	<ul style="list-style-type: none"> <li>Marketing campaigns based on patient or member journey stage</li> <li>Drive appointment scheduling and completion for top service lines</li> </ul>	<ul style="list-style-type: none"> <li>107 campaigns configured</li> <li>150 journeys launched</li> </ul>



Journey Builder: Automated, Personalized Journeys

**Geisinger**

Hi Kamila,

The myGeisinger patient portal gives you a more convenient way to manage your care, with everything in one spot. It's secure, fast and free — and available 24/7 from your computer or mobile device.

**You can use myGeisinger to:**

- Schedule or cancel appointments
- View test/lab results
- Renew prescriptions
- Message your care team
- Access your medical records
- And more

myGeisinger is easy to navigate, secure and only takes a few minutes to set up. Click below to get started and take charge of your health.

[Register for myGeisinger now](#)

You are receiving this message because you are a member of the Geisinger family. If you have activated your myGeisinger account, please disregard this email.

**Geisinger**

Hi Kamila,

Managing your health doesn't stop once you leave the doctor's office. Take charge of your healthcare with myGeisinger and manage your medical information in one place.

**Use myGeisinger to:**

- Renew prescriptions
- Track your vitals and health stats (blood pressure, weight, etc.)
- Schedule or cancel appointments
- Share your medical record
- And much more

Access all your medical information right from your computer or mobile device, 24/7.

[Sign up now](#)

You are receiving this message because you are a member of the Geisinger family. If you have activated your myGeisinger account, please disregard this email.

**Geisinger**

Hi Dave,

Your health journey is unique — so is the way you manage your health. As a myGeisinger user, the MyChart mobile app makes managing your health both easy and convenient.

**Use the MyChart app on your smartphone or tablet to:**

- Renew current medications
- Message your care team
- Manage a loved one's care
- Track your vitals and health stats, like weight and blood pressure
- And more

It's secure, easy to navigate and free. Click below to get started.

[Download the MyChart app](#)

You are receiving this message because you are a member of the Geisinger family. If you have activated your myGeisinger mobile app, please disregard this email.

Sample Journey: MyChart Activation














# Patient outreach and campaigns

Objectives	End Users	Use Cases	Results
<ul style="list-style-type: none"> <li>• Reduce time to be seen for primary and specialty care</li> <li>• Improve population health through care gap closures</li> <li>• Improve patient satisfaction through increased access and scheduling</li> <li>• Increase revenue/margins through improved provider utilization</li> </ul>	<ul style="list-style-type: none"> <li>• Digital Marketing &amp; Analytics teams</li> </ul>	<ul style="list-style-type: none"> <li>• Patient outreach: multi-channel communications</li> <li>• Marketing campaigns (in collaboration with clinical operations)</li> </ul>	<ul style="list-style-type: none"> <li>• Increased outreach campaigns</li> <li>• Increased order conversion</li> <li>• Decreased order work queues</li> <li>• Increase ease of contacting</li> <li>• Increased ease of scheduling</li> </ul>
	<ul style="list-style-type: none"> <li>• Patient Contact Center agents</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Next Best Actions:</b> <ul style="list-style-type: none"> <li>• MyChart activation</li> <li>• Active orders – schedule</li> <li>• Mail order pharmacy</li> <li>• Past due balances</li> </ul> </li> <li>• <b>Outreach campaigns</b> <ul style="list-style-type: none"> <li>• Care Gaps – cancer screenings</li> <li>• Provider cancellations &amp; reschedules</li> <li>• Patient no-show/cancellation &amp; reschedules</li> <li>• Wellness reminders</li> </ul> </li> </ul>	



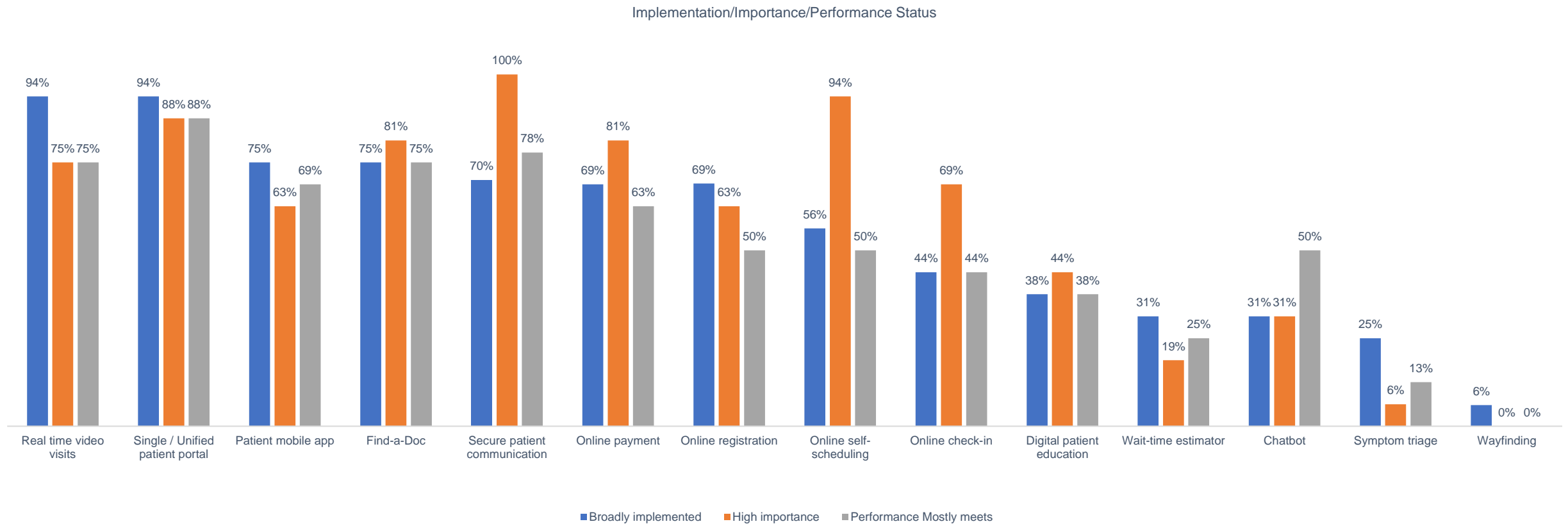
# CRM implementation : technology components

 <p>Master data management &amp; identity resolution</p>	 <p>Sync Epic campaign activity with patient contact records; update attributes, update SFCRM</p>	 <p>Broker/Employer CRM</p>	 <p>HCRM + Payer CRM</p>	 <p><b>Enterprise Automated Letters</b> GHP solution for document management/ automated direct mail of templated, personalized letters to members</p>	 <p>CTI adapter</p>
 <p>Centralized repository of person and prospect marketing data and demographic attributes. Epic updates persons and lead records to update SFMC</p>	 <p>Report on Epic campaigns; receive data from Cheers, SFMC, SFCRM, Twilio/Acqueon. Encounters, prospects, patients, members, revenue</p>	 <p>Outbound communications honoring consumer's communication preferences (Phone, letter, email, SMS, MyChart secure message, MyChart app push notifications)</p>	 <p>Event management, registration, communications</p>	 <p>Execute SMS portions of Epic &amp; SFMC campaigns; receive data from SFMC &amp; Epic</p>	



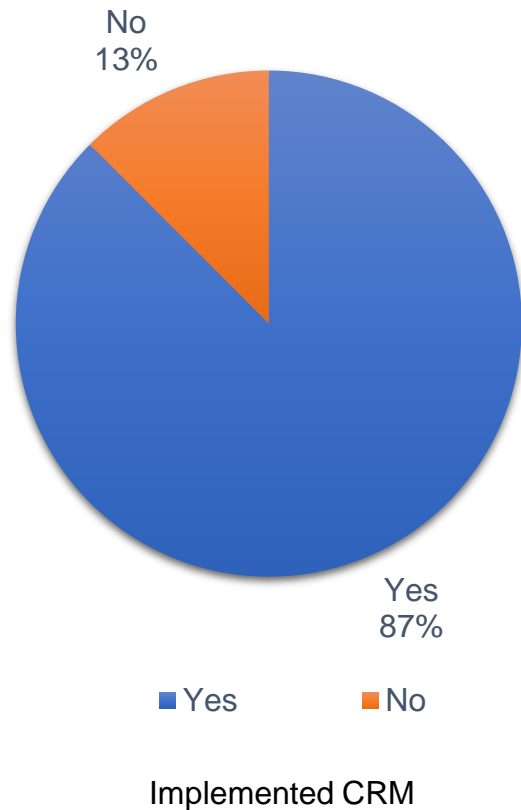
# CRM and Digital Patient Engagement \*

Significant opportunity to improve performance in high-impact engagement touch points

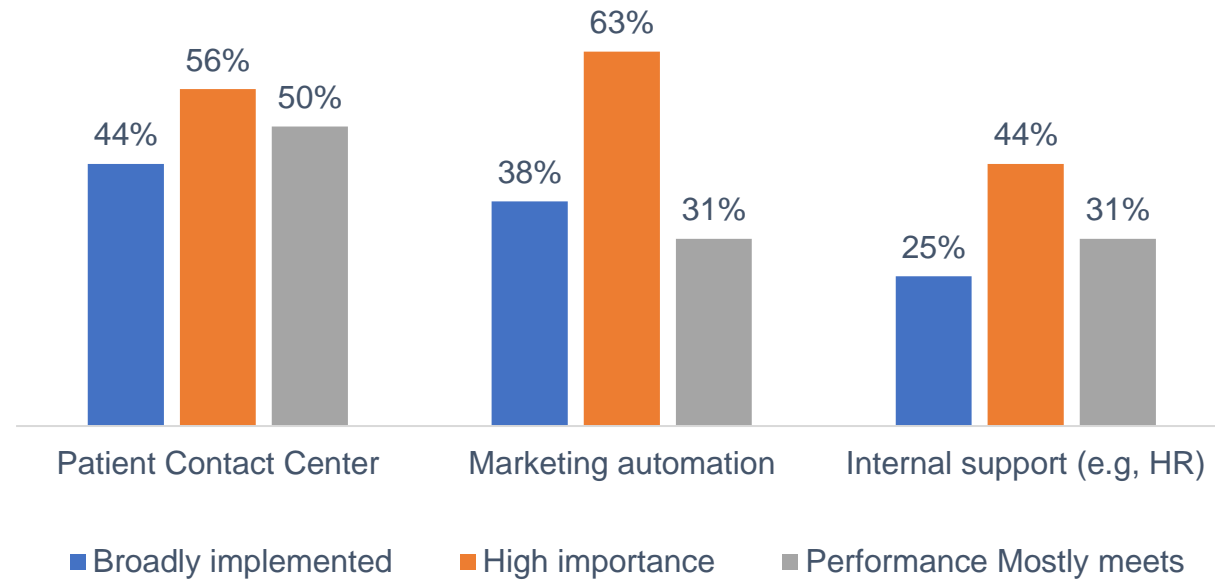


Source: Damo Consulting DigiM™ Digital Maturity Model Benchmarks

# DigiM™ Industry Benchmarks: CRM\*



## CRM Implementation by use cases



# How leading healthcare enterprises are leveraging CRM\*

S/N	Healthcare Enterprise	Marketing automation	Patient engagement	Claims management	Patient 360	Broker engagement	Internal support (e.g., HR)
1	Integrated Health System	Y	Y		Y	Y	Y
2	Integrated Health System	Y	Y		Y		Y
3	Integrated Health System	Y	Y		Y		Y
4	Integrated Health System	Y		Y		Y	
5	Integrated Health System	Y	Y		Y		
6	Integrated Health System	Y	Y		Y		
7	Integrated Health System		Y	Y	Y		
8	Integrated Health System	Y	Y		Y		
9	Integrated Health System	Y	Y				
10	Integrated Health System	Y	Y				

\*Source: DAMOINTEL™ Digital Health Intelligence Database



# Learnings

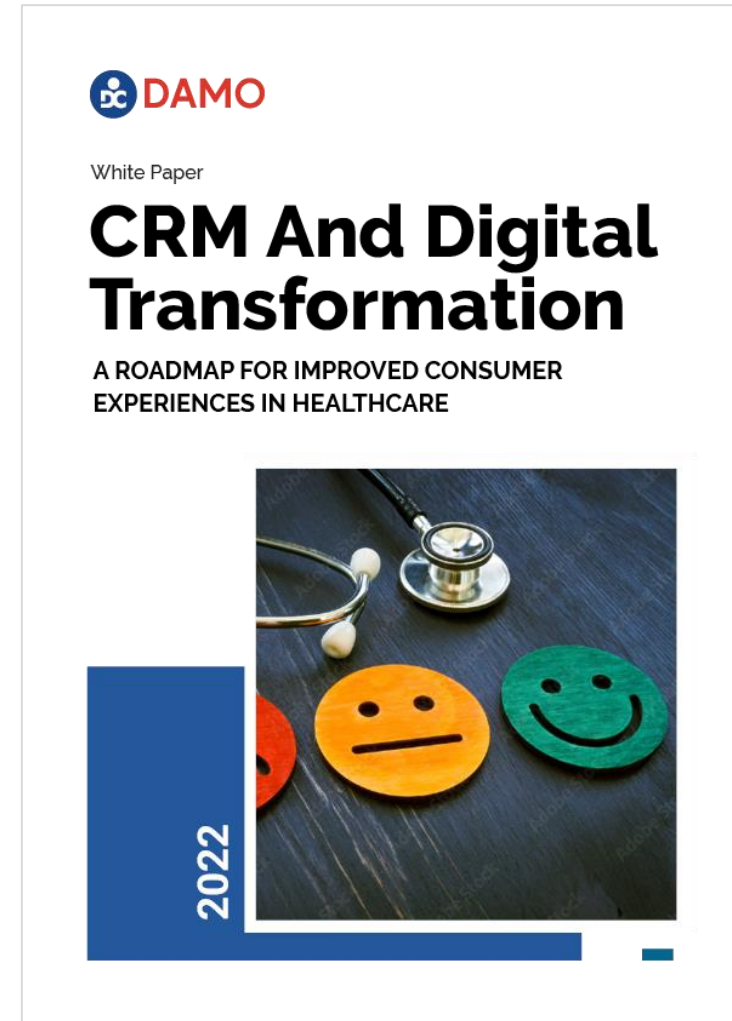
- ✓ Ensure CRM alignment with enterprise strategic priorities
- ✓ Prioritize CRM initiatives with cross-functional stakeholder inputs
- ✓ Ensure readiness with internal resources to support planned initiatives
- ✓ Identify best practices across healthcare and other sectors
- ✓ Consider overall TCO and tradeoffs across CRM technology stack
- ✓ Assess integration and data management needs early
- ✓ Assess impact of multi-vendor environment for platform and services
- ✓ Ensure robust governance involving business and technical teams

**CRM is not a technology; it is an approach and framework for engaging with customers**

# CRM and Digital Transformation

## New White Paper

---



# Thank you!

**Paddy Padmanabhan**

[paddy@damoconsulting.net](mailto:paddy@damoconsulting.net)

<https://www.damoconsulting.net/>

**John Kravitz**

[John.kravitz@workday.com](mailto:John.kravitz@workday.com)

<https://www.workday.com/>