

CASE STUDY



HOW DAMO HELPED SENTARA DEVELOP AN ENTERPRISE CRM STRATEGY AND ROADMAP IN THREE MONTHS



Sentara Healthcare is a large not-for-profit integrated healthcare delivery system on the East Coast with more than 29,000 employees, 12 hospitals, and a health plan that is recognized nationally for clinical quality and safety. They are strategically focused on innovation and creating an extraordinary healthcare experience.

Sentara Healthcare has a well-defined strategic vision to deliver personalized experiences for customers that are both a patient of their health system and a member of their health plan. Sentara's leadership recognized that their Customer Relationship Management (CRM) program would be a key enabler for achieving this vision. Damo was engaged to develop a 3-year enterprise roadmap for their CRM strategy. This involved documenting and analyzing their current state, finding gaps and opportunities, and creating a roadmap to inform how CRM would play a key role in working toward their strategic vision.

Lack of an enterprise-level CRM strategy put the strategic vision at risk

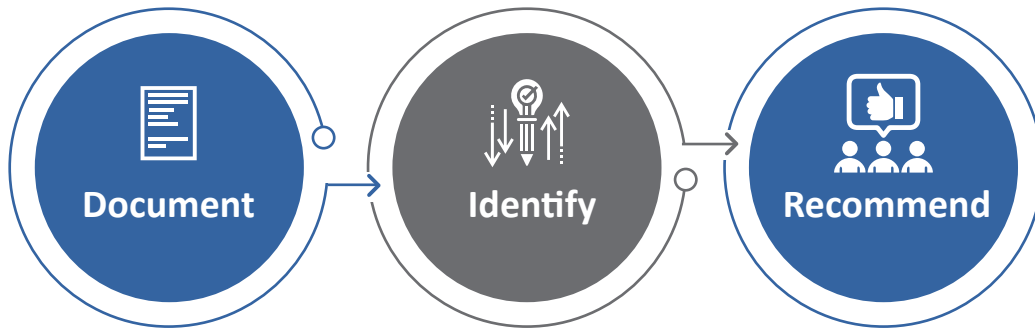
Sentara's strategic vision includes delivering an omnichannel, personalized experience. They recognized that their CRM approach was highly fragmented and that the financial investment was growing significantly year after year. Sentara knew the potential and the rising importance of a robust CRM to fuel growth, deliver better communications and experience, and as a tool for their efforts to consolidate contact centers. With the introduction of Epic Cheers as an EHR-based CRM solution, they also wondered if there were compelling reasons to formally evaluate the capabilities of Cheers as part of their CRM program.

The Damo team used a proven three-step methodology for developing an enterprise CRM strategy and roadmap:

- 1 Document and understand the current state and establish the baseline;
- 2 Identify gaps, opportunities, and needs through a combination of deep industry knowledge and careful discovery of the Sentara's internal expectations and capabilities; and
- 3 Define specific recommendations and projects along a three-year roadmap with prioritization and dependencies.

Working closely with senior executive stakeholders, the Damo team documented the current state of CRM and, leveraging the [DAMOINTEL™](#) platform, performed a gap analysis and industry research. Ultimately, Damo identified six projects to advance the Sentara's enterprise CRM in the near term and additional priority projects for years two and three.

Methodology



1

Documenting the current state

Insights into the organizational understanding and support for an enterprise CRM approach were documented and analyzed through interviews with key executives and stakeholders. Additional perspectives were captured through an internal survey of over 125 distinct roles throughout the organization. The insights were categorized into six key learnings that highlighted communication deficits and shared concerns, along with ways to align around first use cases and build capabilities and support for the CRM program.

Other components of the current state included an analysis of the use of Salesforce across the health system and health plan, planning for contact center consolidation, current governance, vendor management, and an assessment of Epic Cheers as a potential additional platform for CRM.

Damo's proprietary database, [DAMOINTEL™](#), provided market research on how leading healthcare organizations utilize Salesforce and approach CRM. Popular first use cases for CRM include marketing automation, patient/member engagement, patient 360, and online scheduling.

Four focused conversations with peer organizations followed to learn how each approached their CRM journey, the platforms they are using, which platforms they have considered, technical considerations, integrations, third-party applications, and governance. These conversations revealed that while Salesforce is being used as an initial CRM almost universally, many were piloting and using newcomer Epic Cheers for various reasons, including the potentially lower cost and easier integrations.

2

Uncovering and identifying gaps and opportunities

Based on the current state analysis, vendor analysis, and market research, Damo found that Sentara had gaps and opportunities in six main categories:

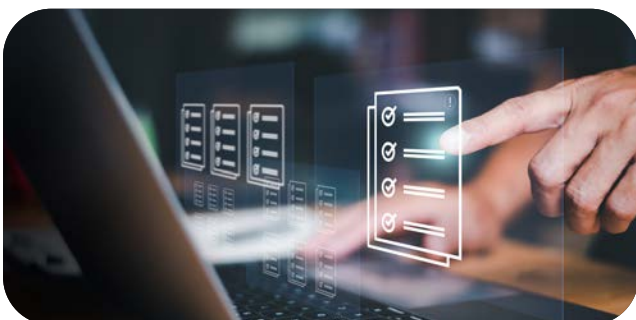
- Communication and alignment
- Governance of CRM and planning for a CRM Center of Excellence
- Support for projects in flight
- Understanding the patient/member journeys
- Selection of an optimal implementation partner
- Developing and adding internal CRM capabilities and skills

An understanding of the Sentara's unique needs and internal capabilities allowed the Damo team to develop an opportunity landscape to help meet their strategic goals and ensure the success of the projects that Sentara already had underway.

3

Recommendations for Sentara's three-year enterprise CRM Strategy roadmap

Based on the specific findings in steps 1 and 2 and using Damo's extensive industry research and experience, the team recommended six projects that would provide immediate value and be foundational to Sentara's growing CRM program. The Damo team also built longer-term projects into the roadmap that would increase the Sentara's ability to expand and stay competitive in a very crowded geography. With proper resources and attention, these projects could be executed on a three-year timeline.



Resulting plan enables Sentara's strategic vision

Customer experience is the current battleground in healthcare. Like many leading healthcare organizations, Sentara needed to reimagine their customer experience and engage them more compellingly. CRM capabilities and functionalities are powerful enablers for providing the personalized, meaningful experience that Sentara aims to deliver.

Often, support for initial high-value use cases is the building block for CRM success. Sentara immediately implemented support for the most highly prioritized CRM use case with dedicated subject matter experts on the Damo team.

Strong internal leadership and sponsoring of this project led to a plan that thoughtfully coordinated and enabled Sentara's rapidly expanding CRM footprint. The plan also helped to manage their growing CRM-related costs. This project developed and delivered an actionable strategy in **THREE months**.

3
months

Delivered actionable strategy



Sentara recognized the importance of partnering with an experienced firm for our CRM strategy. Damo brought a team with deep industry knowledge that developed an Enterprise CRM Strategy and Three-Year Roadmap. Their recommendations and insights provided a strong foundation and framework for our CRM program as well as the immediate projects to pursue."

Tim Skeen

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For more information



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Damo Consulting provides digital transformation advisory services to enable healthcare organizations navigate the technology-enabled transition to telehealth and virtual care. We bring deep industry knowledge, market insights and technology skills to help develop and implement enterprise digital roadmaps.

