



2023

**State of Healthcare
Experience**



Agenda

- ▶ Insights regarding the state of healthcare experience
- ▶ 3 strategies successful systems and disruptors are implementing to create better HX
- ▶ Ochsner Health case study for identifying and tackling friction points in the consumer experience

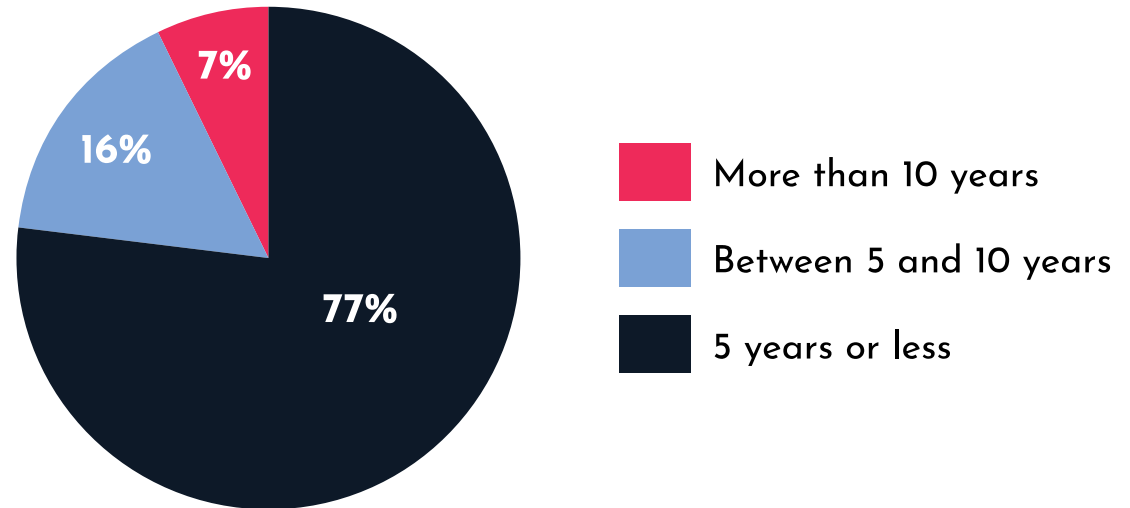
Where are we now?



“*The metaverse has become the newest macro-goal for many of the world’s tech giants.*”

-Matthew Ball, EpyllionCo

77% of consumers expect brands to have the ability to use the metaverse for customer service in the next 5 years.



Brands in the Metaverse



Nike launch of Nikeland in Roblox overlaps physical and digital engagement strategies.



With the April 2022 launch of Chipotle Burrito Builder in *Roblox*, the brand lets users roll virtual burritos in exchange for IRL food vouchers.

“We’ve tapped into play-to-earn, an emerging engagement model in the metaverse,” says Chris Brandt, CMO at Chipotle.



Disruptors are making plans...

CVS plans to bring its pharmacy and health clinics into the metaverse.

The metaverse could open an entirely new avenue for customer service and personalized care in the mass-market health retail sector. Following chain drugstores' collective step into the role of care providers, **virtual clinics and counseling could prove a way to deepen that shift—alongside an evolution of over-the-counter commerce.**





**Healthcare can't think about the
experience of the future until they've
mastered the experience of the present.**

Methodology

22 interviews with leaders at healthcare systems and healthcare disruptors



“For providers, they're typically focused on providing care, leading edge medicine and keeping people healthy or treating them when they're sick. [sic] Other administrative aspects are secondary, they're housekeeping. You got to keep the business going, even if you're a nonprofit. Thinking about the patient as a consumer has not been at the forefront.”

VP, Product, Customer & Partner Marketing, Disruptor



The gold standard for care has been outcome based.



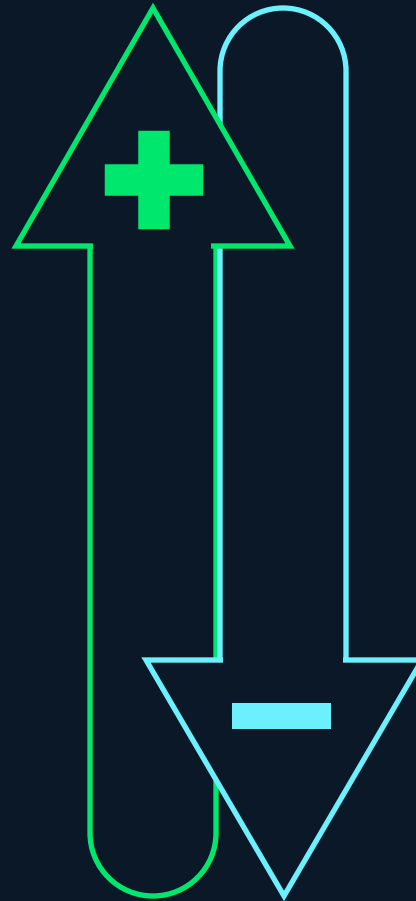
Patient experience goes beyond care delivery.

While disruptors have some major advantages, they are also at a disadvantage...

—————
Born with consumer 1st mindset

Singular focus/expertise

Agile and flexible
—————



—————
Don't understand the complexities of
healthcare

Lack patient trust
—————



The **TRUST** Advantage



“You know the immediate advantage that I think health systems and providers will continue to have is the trust and relationship in the community. Our locations are...just embedded in the community and you see your doctors at the grocery store. And so, there's this trust and relationship and expectation of high quality and personalized care.”

- System, CSO



Hospitals emphasize the level of trust they have with the end consumer and the advantage that affords them. However, while they are trusted to deliver care, what about the other parts of the patient journey?



The CONSUMER 1st Advantage



“The single most important metric that we have as an organization is consumer activation and consumer adherence. And there is a commercial reason for that: consumers don't use, we don't get paid.”

– Disruptor, CEO



One of the primary reasons disruptors have made so much progress so quickly is their Consumer 1st attitude.



Patient vs. Consumer



Previous perceptions of a healthcare consumer is to classify them as a “patient.”



However, the “patient” experience really begins and ends with care.



All other components of the experience are being compared to consumer experiences outside of healthcare.



“Consumer” indicates choice. And your “patient” has a choice to continue their journey with you every step of the way.

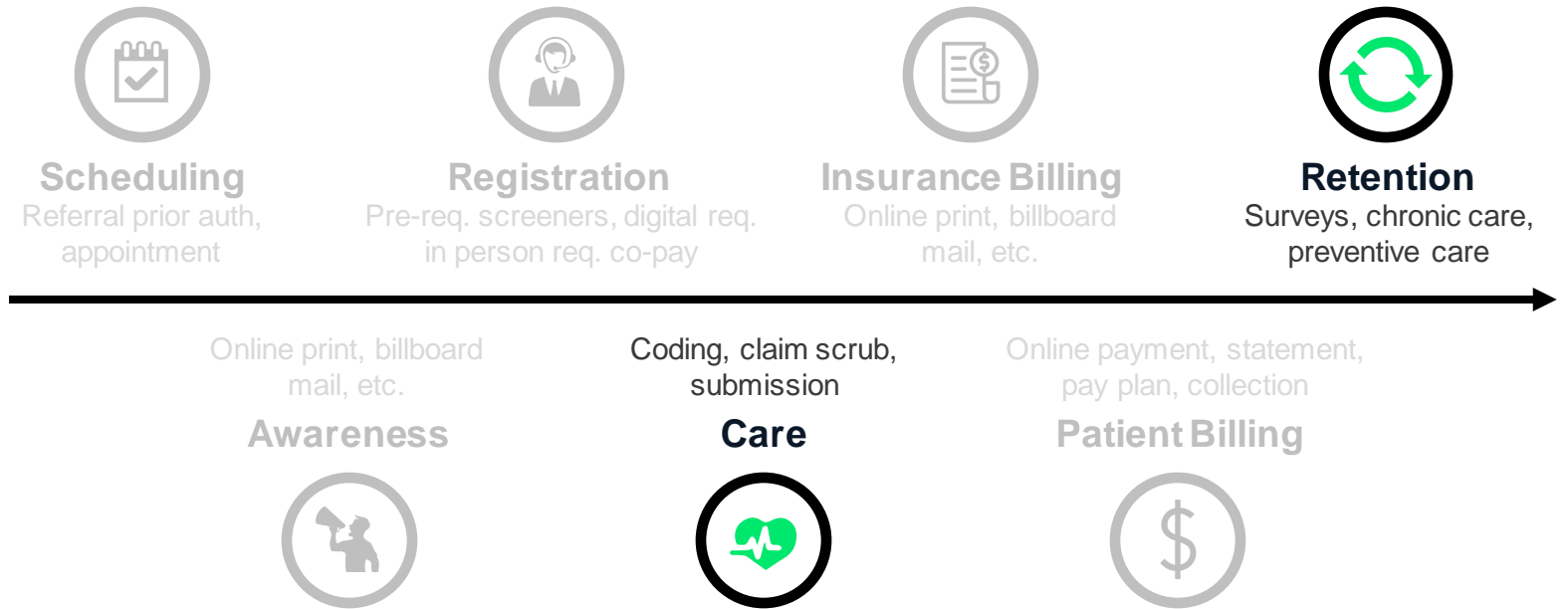


Patient vs. Consumer

Systems already own trust and the *patient* experience but must shift focus to own the entire healthcare *consumer* experience.

Consumer Journey

■ Patient Centric



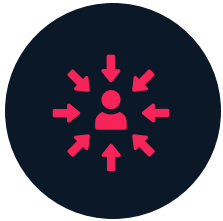
Patient vs. Consumer

“I remember the very first time I used the word consumer or customer in a presentation...back in the early 2000s in front of a group of physician leaders, and they almost threw me out of the room.”

-Chief Marketing and Communications Officer, System



Defining Customer Experience



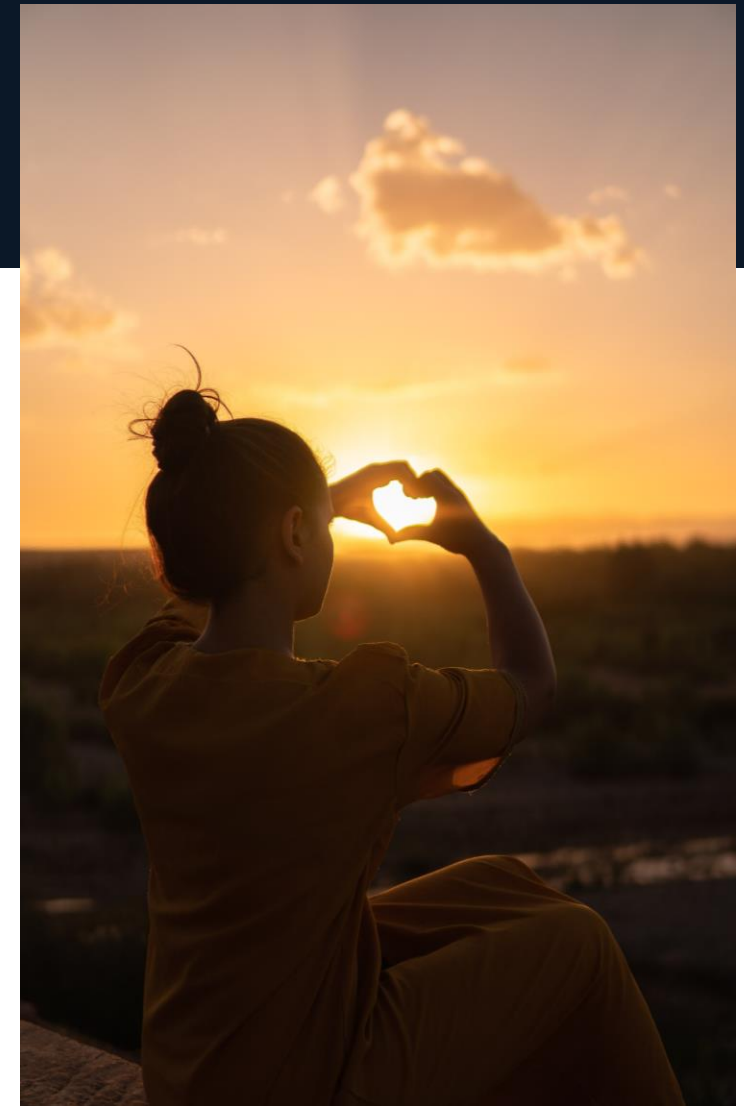
Putting the patient at the center

- Connecting the full journey with seamless transitions (solving for a fragmented system)
- Enriching with technology
- Creating uplifting moments

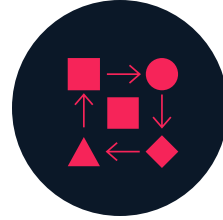


Having a CX team means someone represents the consumer within the organization

- Bringing traditionally siloed departments together to reduce patient friction



**To be successful,
healthcare entities
must create
experience
strategies that...**



Prioritize the Consumer Experience

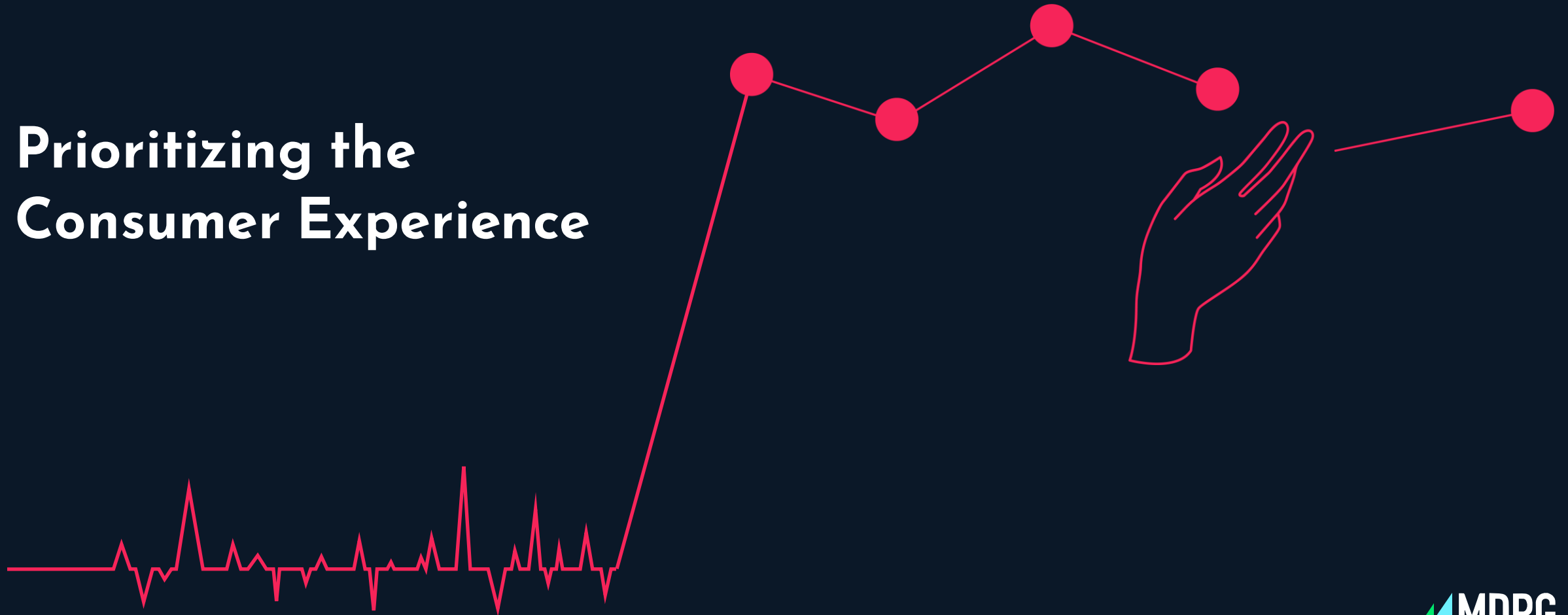


Integrate Voice of the Consumer



Focus on Engagement

Prioritizing the Consumer Experience





Disruptor Advantage



Often started to “fix” a single pain point.



From inception, the consumer IS the priority.



“Consumers don’t use, we don’t get paid.”
-Disruptor, CEO

Healthcare has come a long way



“Folks don't have a lot of patience for brands to not meet their needs anymore.”

-Chief Marketing and Communications Officer,
System



“...my experience with booking travel or a restaurant reservation have been made easier, more autonomous, frictionless for me. Those are the expectations... so we want to look outside and better understand what are they doing.”

– Chief Strategy Officer, System

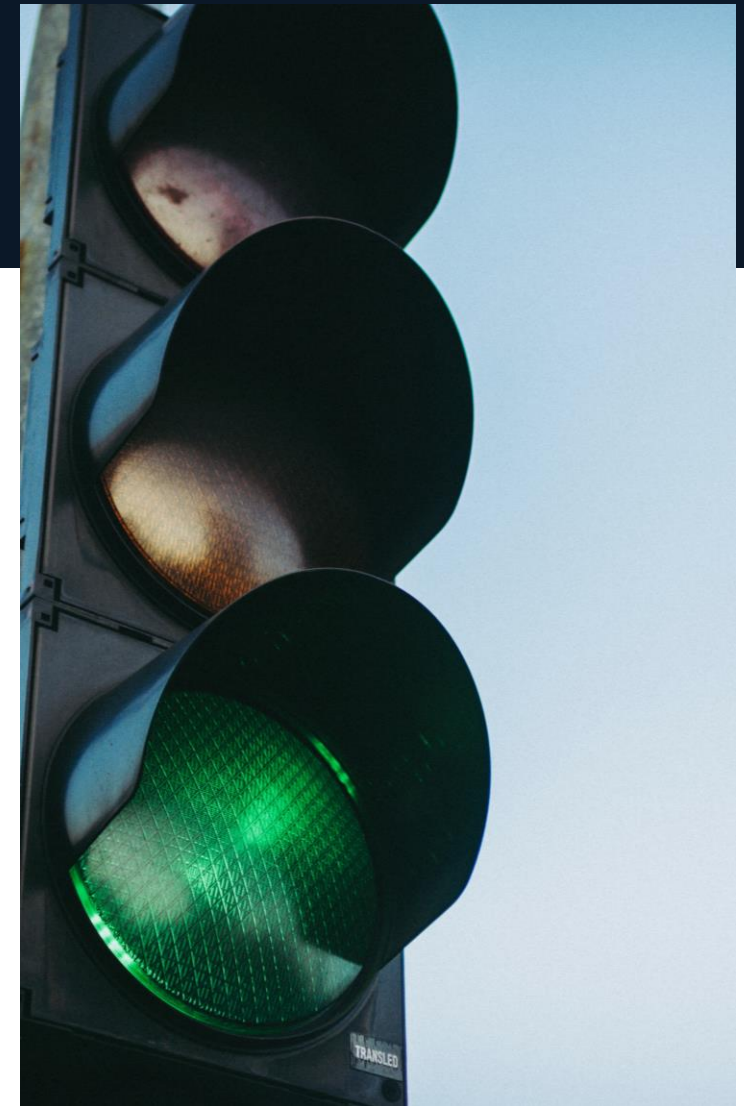


Defining Customer Experience



“Really, it originated from the CEO getting too many complaints from other executives and board members and saying, ‘man, my wife came here to get service. And can you believe how horrible it was for us to get an appointment for us to understand? How much we were going to owe for us to work through their authorization?’ Nothing about the clinical experience. The clinical experience was fabulous, right? But it was everything else that was sort of bringing down that overall feeling of what a positive interaction and what we tend to say is, you know, you've got the sort of the clinical experience and everything else, but patients don't separate the clinical experience and everything else.”

- Partner, Disruptor

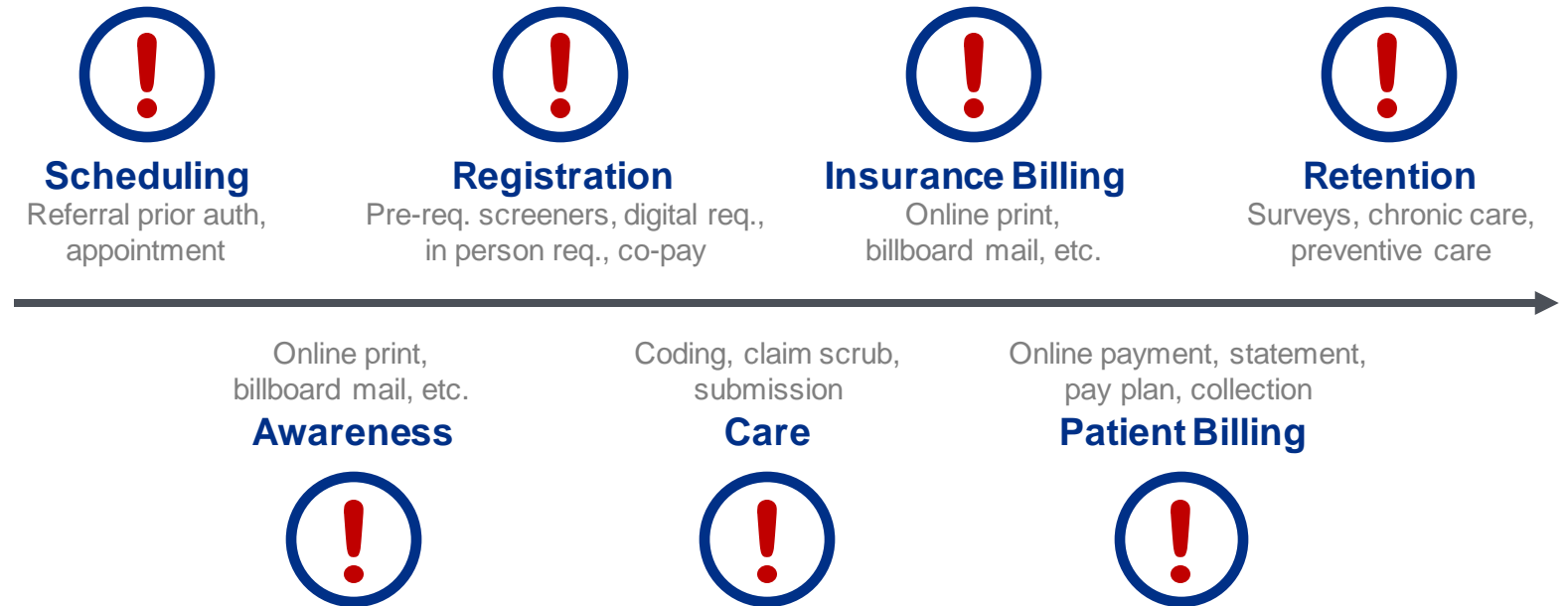


Successful systems are focusing on identifying points of friction and optimizing the micro-journey.

The customer journey is the most common tool used to elevate CX within an organization to align CX goals with organizational priorities.

It also helps to identify pain points of the customer within that journey and allows organizations to create plans of action to solve the pain points.

Helps to align resources beyond marketing and customer experience.

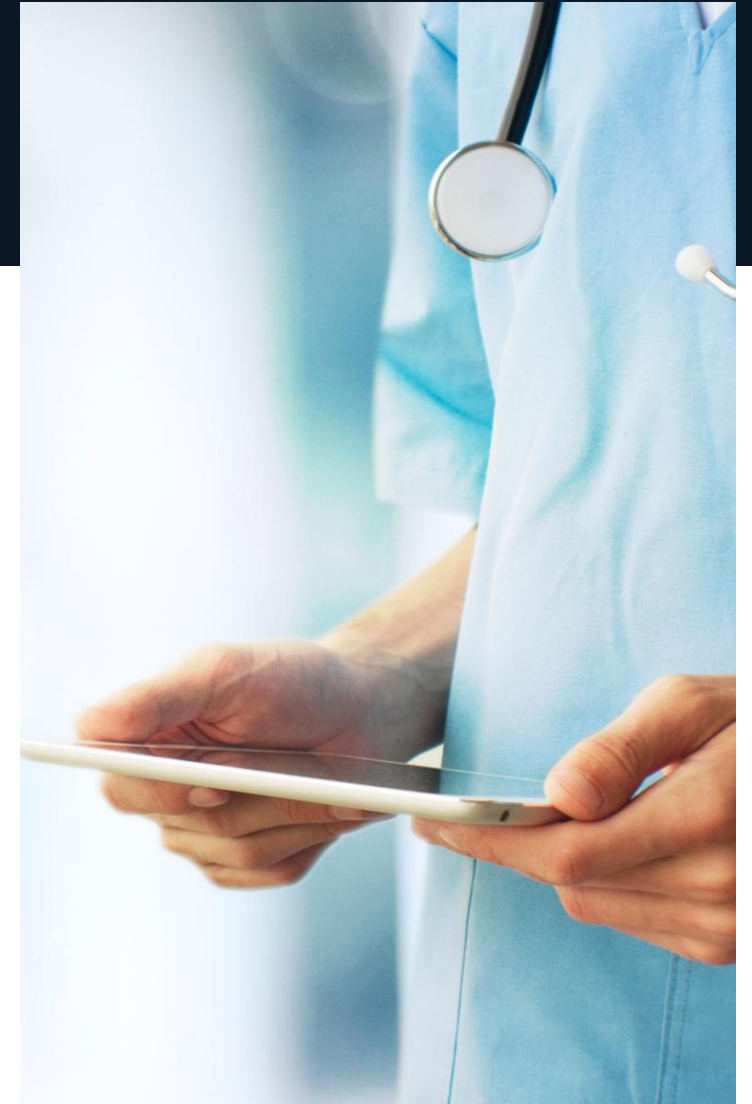


Prioritizing CX throughout the organization



“Preregistration, it's paperwork, it's clipboards. It's filling the same thing out a million times. Friction as you go from one department to another. Let us ask you the same 5 Dang questions, even though it's all right there in Epic, why?”

Chief Strategy Officer, System

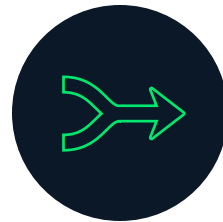


Prioritizing CX throughout the organization

Elevate the customer journey as a singular point of reference for all departments.



Include all parts of the organization that impact the journey.



Align individual departments around friction points and priorities.



Make it easy to understand and act on.

Integrating Voice of the Consumer





Disruptor Advantage



Voice of the consumer (VOC) is integrated into disruptor processes for decision making.



“We have consumer test panels and will get updates from our product or our technology. (We’ve) [sic] added certain decision gates into our own internal processes, ...ensuring that it's been reviewed by consumers? (Have we) gotten a broad perspective of different consumers into the process? And if the answer is no, then we don't advance and we make sure that we go back and do that.”

CEO, Disruptor

Disruptor Advantage



Digital disruptors live for UX testing.



As healthcare begins to blend the digital experiences into the customer journey, understanding whether or not the experience is easy will be critical to gaining adoption.



Disruptor Advantage



“(There are) design principles that we really strive for...one of them is ease of use. That's a key one for us like if it's a mobile app. It needs to be really easy to use. Folks aren't feeling well. The easier it is to use, you're more likely to keep people coming back when they need to use it again.”

Disruptor

Systems vary in sophistication integrating VOC

Challenges

- Lack of alignment
 - For example, IT moving initiatives forward without customer feedback or insight
- Urgency to demonstrate progress, no patience for research to ensure it's the right solution
- Research is not accessible
 - It exists but lives in silos within certain departments
 - It is not easy to digest and understand why it matters



Systems vary in sophistication integrating VOC



“It's episodic and I think it puts a lot of burden on leaders who are launching the programs, looking at new initiatives...to stop and pause and ask, do we know what consumers think? You know, you're in a presentation to leadership and someone in the leadership team or Doctor Who himself, our CEO would say, well, do we know what the public thinks of this? So, I think it's coming up...sometimes as an afterthought”

-Chief Marketing and Communications Officer, System



The most successful systems see VOC as a requirement, not an afterthought.



“...any road map item, any new enhancement or change that we're looking to make, it's a requirement that VOC is baked into that rubric or that decision making process. And at the bigger macro level, we've required voice of customer to be included even when building new hospitals.”

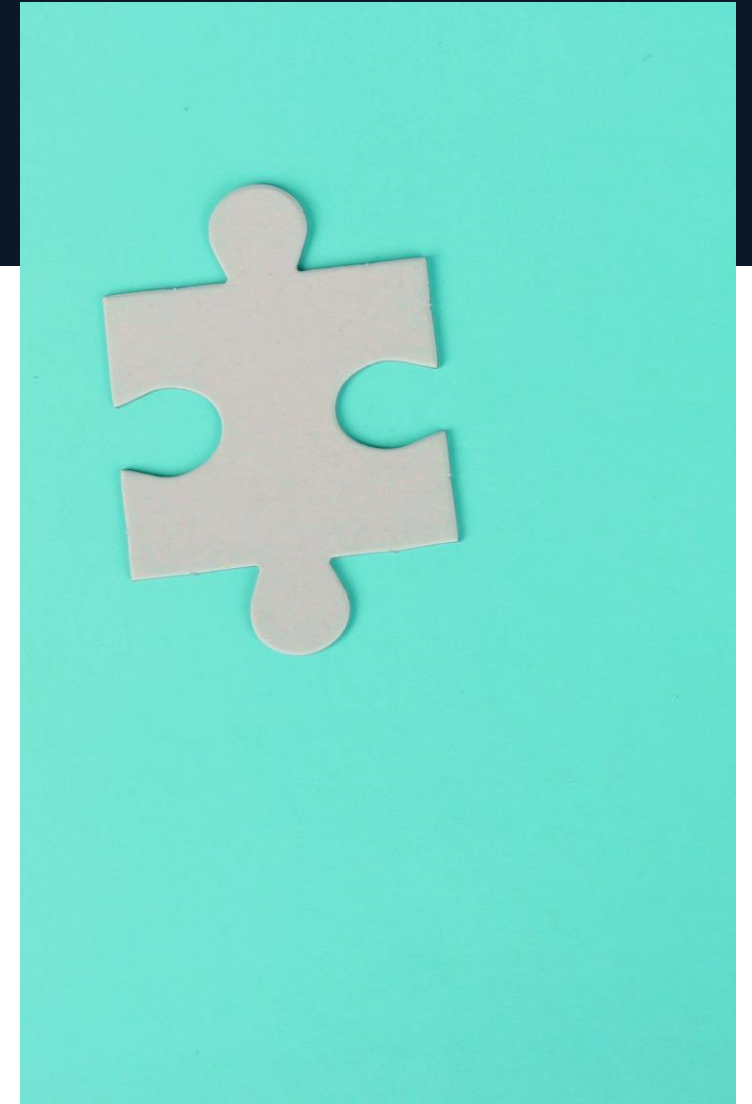
-Executive Director, Digital Marketing & Experience, System



Common System Gaps in VOC

Most systems have critical gaps in their VOC programs

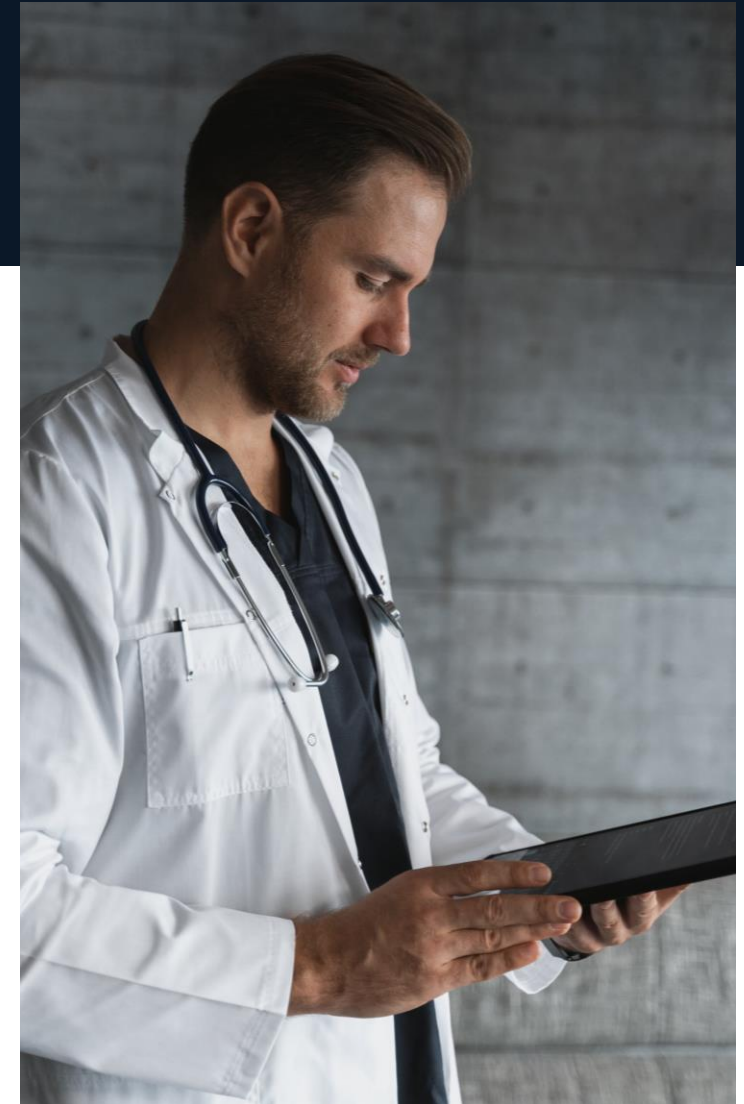
- Feedback throughout patient journey (not just after the visit)
- Trends/future forecasting research
 - Only one organization interviewed had a futurist on their team
- Exploratory pain point research to identify true consumer friction with their organization
- Persona development
- Ethnography
- Sentiment analysis



Incorporating employee experience

Disruptors and innovative health systems also look at employee experience scores

- Provider team experience directly impacts customer experience
 - Reducing provider friction in turn reduces patient friction
 - Educating providers on how to communicate with patients
 - Even more important in a post-COVID world where care teams struggle with burnout



Incorporating Employee Experience

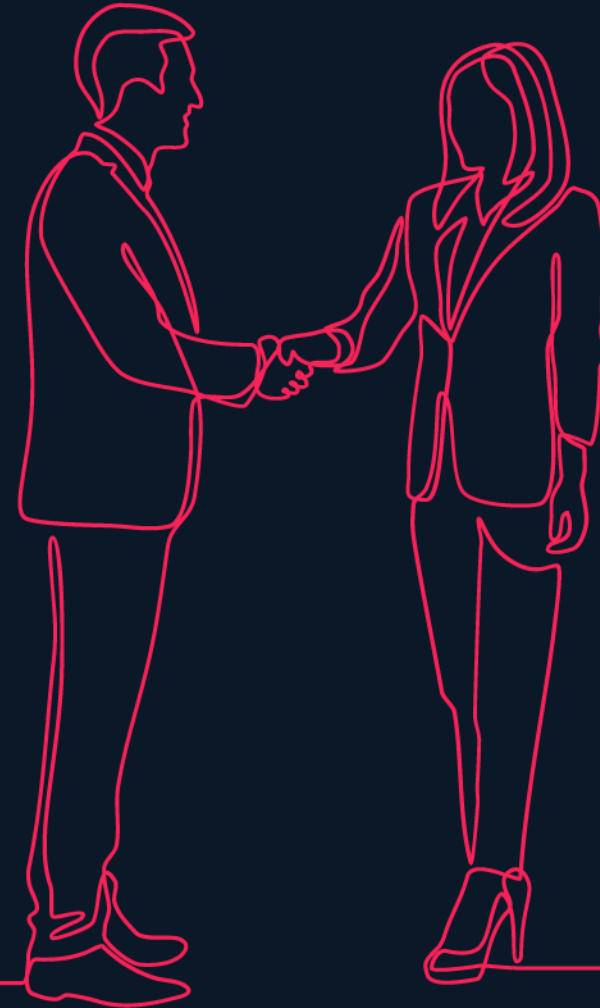


When you treat brand as separate and you treat your team members or employees as separate, you really don't have customer experience because those are the individuals that are going to be delivering that experience to your consumers, and I see this play out in healthcare hospital systems where all these things are considered separate. But in your more consumer leaning organization, those things typically are combined.

-Executive Director, Digital Marketing & Experience, System



Focusing on Engagement



Disruptor Advantage



Disruptors measure success by engagement. Engagement is a **leading indicator** for revenue and loyalty.



As healthcare begins to blend the digital experiences into the customer journey, understanding whether or not the experience is easy will be critical to gaining adoption.



Disruptor Advantage



“It all goes back to engagement and that's under personalization. We deliver the right information at the right time to optimize engagement. That's our DNA. If there's no engagement, there won't be any results.”

-Disruptor

Systems are beginning to see the value in engagement metrics.

However, reliance on KPIs that act as lagging indicators is pervasive and institutionally ingrained.

“ We're looking at a lot of what I call transactive metrics in different spaces, right? So over time, are we a brand that we see increasing engagement by our patients and their family members? Is it a brand that's being chosen for broader and deepened relationships, as opposed to one and done?

-Chief Experience Officer, System



Most mentioned system KPI's:

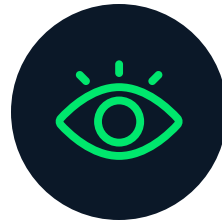
- NPS
- Press Ganey
- Loyalty/Retention
- HCAHPS/CGCAHPS



Where CX is Headed



Deeper investment in customer experience (budget and incorporated into priorities) will be critical not just to differentiate but to keep up.

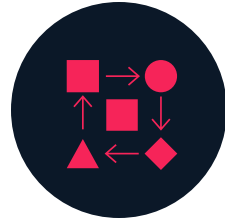


Clear vision not only for leadership but also for staff. Care teams will know what to do and why.



Better device and technology integrations and increased mechanisms of personalization will support continued development of CX programs.

**To be successful,
healthcare entities
must create
experience
strategies that...**



Prioritize the Consumer Experience



Integrate Voice of the Consumer



Focus on Engagement

Thank You

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