

## WHAT IS A HEALTHCARE CRM? (AND HOW DOES IT FIT IN WITH MY SYSTEMS?)

A **CRM** (which stands for customer relationship manager) is a database of potential and current customers that is combined with automation tools to manage interactions and relationships.

A **healthcare CRM** is a database of patients that automates health care access and closes gaps in care. It is context-aware and guides the agent all the way through a simple holistic workflow. As the result, patients receive a safe, secure, and personalized experience for every interaction with their healthcare organization.

# Types of CRM

## SALES CRM



These tools automate emails, outbound calls, and other contact points with prospective or existing customers. The term “CRM” started with sales database and automation tools in the 1970’s that tracked interactions with potential clients. The goal is to keep prospects engaged and move them through defined relationship stages for measurement, predictability, and automation.

## MARKETING CRM



Later, Marketing CRMs brought significant disruption to what had historically been a very creative vertical with data analytics and marketing automation. Marketing CRMs use quantitative analytics to automate advertisements, messaging, email, and content to move prospects through a “funnel.” Given the overlap between marketing and sales, these CRMs are now often integrated.

A few dominant sales and marketing CRM companies are Microsoft Dynamics, Salesforce, and Oracle.

## SERVICE CRM



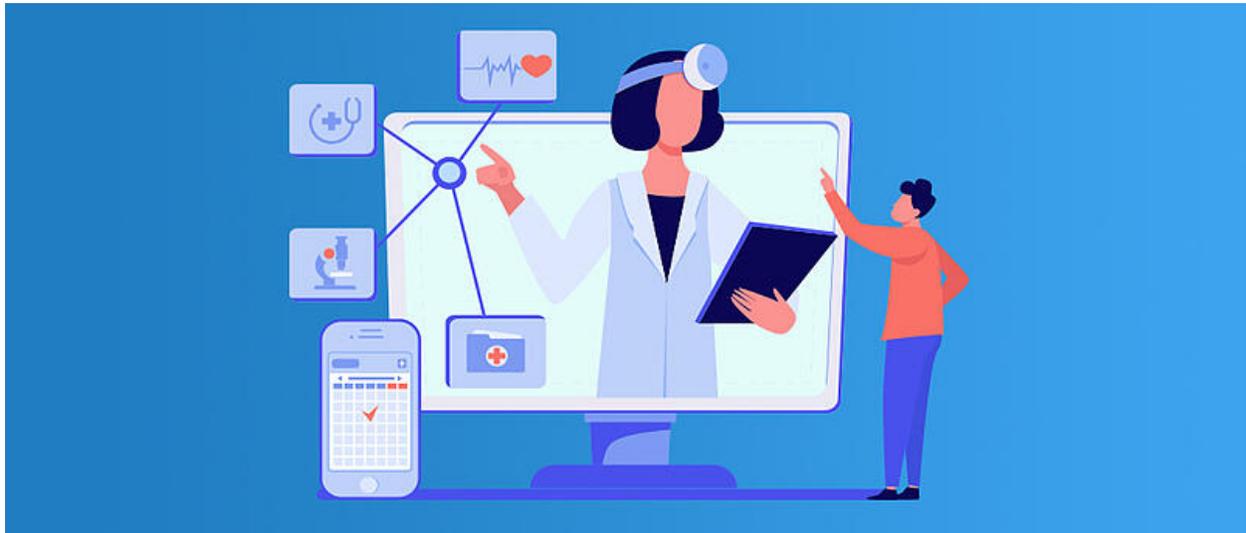
Service CRM tracks and automates the provisioning and delivery of services. These products focus on capturing, documenting and triaging the clients’ needs, then procuring and scheduling resources to address each need.

These platforms include sophisticated tools including AI, project management, and big data optimization to smooth specialized workflows. Such service-

side automation focuses on managing the workforce and estimating throughput. Most major corporations use a service CRM alongside sales and marketing CRMs.

Names such as BMC Software, ServiceNow, Atlassian, and Zendesk are at the forefront.

# Healthcare CRM



HEALTHCARE CRM IS A SERVICE CRM FOR THE PRACTICE OF MEDICINE

Keona Health Desk is the front door to all healthcare services. It was built by healthcare experts for healthcare providers. Its tools are designed to deliver informed and insightful resolutions and integrates with existing EHRs, PMs, telephone systems, and more.

Providing top-quality patient access to care is the founding principle behind Health Desk. It brings automation to services such as answering patient questions, scheduling appointments, and triaging symptoms over telephone, chat, SMS, or web.

## UNIQUE INDUSTRY ISSUES

There are several critical healthcare issues that no other CRM software addresses. First, Health Desk has service delivery automation tools. For example, helping a patient schedule an appointment is a complex process; the patient doesn't know the type of visit, available time slots, or how to code it for insurance, but the healthcare CRM does.

Second, Health Desk was not created to close deals, but to close gaps in care. It

connects and coordinates everyone who delivers service. It is built around understanding and addressing both patient and organizational needs. This makes it less “pushy” than sales and marketing CRMs.

Third, Health Desk is tailored for contact centers and help queues. For example, it can walk an agent through any inbound question on a single screen.

Traditionally, in order to safely schedule a patient, the healthcare agent must:

- Conduct an initial review of patient symptoms
- If the symptoms were urgent, the agent would need to forward the call to a nurse or a physician to triage the patient
- The nurse or physician would have to document their triage results, including any care advice and health education they provided
- If a visit was determined to be appropriate, the nurse or agent would still have to
  - Determine the type of visit
  - Select the patient insurance
  - Search the PM for the nearest available opportunity and match that to the patient’s availability
  - Check the provider’s visit requirements that the visit slot they find
  - Document the above steps within the visit note

# AUTOMATION TOOLS



Keona's Health Desk products can help:

- Checking symptoms by nonclinical agents (necessary for healthcare safety): [Natural Language Symptom Checker](#)
- Triage patient and providing clinical dispositions by nurses: [Nurse Triage](#)

- Scheduling by business rule and provider requirements: [Intelligent Scheduling](#)
- Scheduling for patients: [Patient self-scheduling](#)
- Referral to specialists or community resources: **Referral Service**
- Messaging automation to coordinate documentation and service delivery across multiple providers and organizations: [Messaging Manager](#)
- Contact center scripting and knowledge base: [Knowledge Base](#)
- Contact center reporting and management of resources: [Overwatch and Business Intelligence](#)
- Delivery of Telemedicine: [Telemedicine](#)

## EXAMPLE WORKFLOW

Here is an example of how healthcare CRM automates patient access over the telephone.

When a call comes in, Health Desk pops open and the agent is automatically signed-in. The page is pre-populated with relevant data:

- The EHR is searched based on the patient's phone number, and relevant matches are ready for the agent to choose
- Knowledge base content loads based on the telephone line called
- Call types are filtered and pre-selected based on the telephone line called and IVR choices made by the caller
- Symptom Checker questions and workflows are automatically filtered based on the patient demographics and location

After pulling in all relevant context from the EHR and other systems, Health Desk provides simple, but comprehensive guidance:

- For appointments, Intelligent Scheduling guides the user to the right appointment, using patient's geo-location, insurance, matching provider preferences, stepping users through even complex multi-resource or multi-visit appointments
- When symptoms are mentioned, agents type whatever patients utter, misspellings are no problem
- Direct agents to the right acuity, indicating what is most appropriate, be that be an appointment, nurse triage, 911, and so on.
- It automatically documents everything in the patient's chart and appointment as appropriate

- Robust scripting and branching guide the agent through the workflow appropriate to the combination of acuity, patient demographic, location, service line, and time of day
- Provider paging is built-in for specialty triage or after-hours paging
- For nurse triage, it can forward directly to a nurse with pre-loaded triage protocols, care advice, and health information
- For Service Referrals, it takes into account the patient's geo-location and distance calculations
- Patients can be sent secure messages with pre-visit data and health information specific to their symptoms

Agents aren't the only ones benefiting from a holistic system. Managers benefit from:

- Ability to customize workflows and content
- Real-time oversight shows summary statistics and activity per queue
- Historical reports present symptom searches and trends
- "Anatomy of an encounter" performance reports facilitate detailed coaching of users, teams, and shifts
- Population trends mapped to zip code
- Business Intelligence tools that allow business users to create reports without the assistance of IT or programmers

By smoothing the path for your agents, Health Desk builds a bridge to provider satisfaction and patient happiness.

## The Purpose of a Healthcare CRM

A healthcare CRM makes every patient interaction personalized and supportive. It focuses on the role of the schedulers, nurses, and contact centers in addressing the following problems:

- Reason for contact
- Understanding the patient context
- Utilizing knowledge management during a conversation
- Checking symptoms by nonclinical agents
- Nurse triage and dispositions

- Matching complicated scheduling requirements
- Managing contact and issue queues
- Refilling prescriptions
- Allocating resources to address patient need quickly
- Delivering health education and information in any format patient needs
- Providing health information in whatever format patient needs
- Conducting telemedicine visits

## How is my existing CRM different?

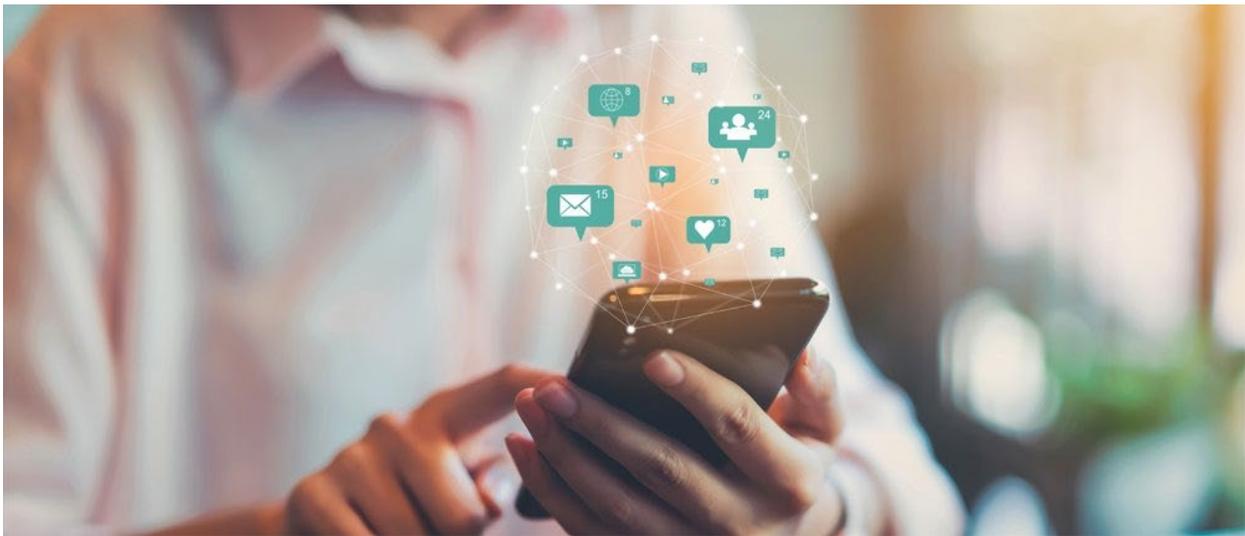


Many health care organizations use a sales and marketing CRM. As discussed earlier, this is a database that manages the relationship progression of customers along a path or “funnel.” It does this by focusing on the roles of sales, marketing, and care coordination, addressing problems like:

- Identifying opportunities
- Segmenting potential customers
- Communicating your messages based on persona
- Distribute content to customers via multiple channels

- Use analytics to learn which messages work best
- Guide potential customers through a journey of discovery and choice
- Manage channels and salesforce pipeline

## Why are sales and marketing CRMs in healthcare?



Because they have tools to automate outbound education and outreach, they are often used to connect with and guide potential patients. They are also helpful in automating patient pathways through services that have pre-defined stages. For example, a sales and marketing CRM might be used for discharge and then move a patient through a care plan, timeline, and offer education.

# We have an electronic health record (EHR). This already is a database of patients!



On the surface, an EHR is very similar; it is a database of patients and their medical records. However, its tools and automation are built to facilitate clinicians with:

- Documentation
- Orders
- Prescriptions
- Alerts and tasks
- Chart outcomes
- Meeting regulatory requirements

Most EHRs aren't designed to help coordinators guide patients through set stages and they don't have automation to facilitate non-clinical users or nurses to provide services. Even though some train their users to use the EHR software this way, it is still incredibly clunky and inefficient.

# My (EHR/CRM) vendor said they were the only tool we will ever need!



While they may believe this, the truth is that shoehorning healthcare problems into a tool designed for a different purpose is frustrating for users; modifying it is very difficult and expensive. Today, all forward-thinking systems support multiple solutions, integrations, and data exchanges.

Health Desk integrates with an incredible number of systems, including EHRs as well as sales and marketing CRMs (see **Integration**). It incorporates information into a single contact center flow while also allowing those systems to incorporate Keona Health capabilities into their original workflow.

WHY THERE ARE SO MANY TOOLS  
**Different tools, different users**

Software	User
Electronic Health Record	for clinicians
Practice Management	for billing
Sales CRM	for sales
Marketing CRM	for marketers
Healthcare CRM	for healthcare contact centers

Software with an intuitive interface streamlines workflow and minimizes clicks. Ironically, the better the software, the clunkier it is when used outside its intended application.

**Different users means different automation\***

	EHR/PM	S&M CRM	Healthcare CRM
Provider, in-person tasks (orders, prescriptions, etc.)	X		
Automated outreach tasks (patient segmentation, automated outreach, etc.)		X	

Providers, Nurses, Schedulers, Agents (Telehealth, patient access, triage, scheduling, prescriptions, etc...)			X
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*\*see detailed table of specific automations above*

Health Desk integrates with your existing EHR, PM, CRM, telephone software, communication software and more.

## USER INTERFACE

Health Desk was developed with the intention of duplicating the in-person office visit experience to the digital environment.

- Check in with a non- clinical agent who registers the patient, verifies insurance, gathers information about social determinants, and skillfully determines the reason for visit or in this case the call. Health Desk ensures that scope of practice regulations are adhered to and that only clinicians offer clinical advice.
- Symptomatic calls are assigned an acuity derived from approved algorithms and either directly transferred to specially trained RN for a triage or assigned to the most appropriate queue for a timely assessment.
- With input from the patient, remote triage nurses follow the esteemed Schmitt and Thompson guidelines. Symptom-specific questions are asked to identify evidence-based criteria that leads to the most appropriate recommendation for care.
- Health Desk’s fully customizable platform fosters loyalty and growth by only referring patients to appointments with their provider’s practice - either in person or virtually, in network ED’s or Express Care or the lucrative laboratory and radiology services.
- Accurate, streamlined scheduling along with real-time updates of provider preferences not only prevent delays in care but also allow for same-day appointments.

## COMPARISON OF AUTOMATION ACROSS TYPES OF PATIENT DATABASE SOFTWARE

	EHR/PM	S&M CRM	Healthcare CRM
<b>Documentation</b>	X	X	X
<b>Orders</b>	X		
<b>Provider Clinical Decision Support</b>	X		
<b>Financial Management</b>	X		
<b>Prescriptions</b>	X		X
<b>Alerts and tasks</b>	X	X	X
<b>Chart outcomes</b>	X		X
<b>Meeting regulatory requirements</b>	X	HIPAA only	HIPAA only
<b>Identifying opportunities</b>		X	
<b>Segmenting potential customers</b>		X	
<b>Communicating your messages based on persona</b>		X	X
<b>Distribute content to patients via multiple channels</b>		X	X
<b>Use analytics to learn which messages work best</b>		X	
<b>Guide potential customers through a journey of discovery and choice</b>		X	
<b>Manage channels and salesforce pipeline</b>		X	
<b>Identification of reason for contact</b>		X	X

	<b>EHR/PM</b>	<b>S&amp;M CRM</b>	<b>Healthcare CRM</b>
<b>Knowledge management during a conversation</b>		X	X
<b>Non-clinical checking of symptoms</b>			X
<b>Nurse triage and dispositions</b>			X
<b>Matching complicated scheduling requirements</b>			X
<b>Managing contact and issue queues</b>		X	X
<b>Refilling prescriptions</b>	X		X
<b>Allocating resources to address patient need quickly</b>	X		X
<b>Coordinate multiple resources to address patient need</b>	X		X
<b>Delivering care advice in whatever format patient needs</b>			X
<b>Providing health information in whatever format patient needs</b>		X	X
<b>Conducting telemedicine visits</b>			X
<b>Communicate and coordinate with external service partners</b>			X

# We Can't Afford Another CRM



## CAN YOU AFFORD TO NOT HAVE A HEALTHCARE CRM?

The benefits of Health Desk have been demonstrated to be substantial, encompassing safety and litigation, revenue optimization, and lower costs:

### **Litigation:**

- Should you be taken to court, you need to have documentation showing proper steps were taken for safety and training, along with what happened during the patient encounter
- A full 50% of telehealth court cases involve actions taken by non-clinical agents, such as schedulers.
- Health Desk provides tools to enhance the patient safety, like Symptom Checker, Triage, and e911.
- Health Desk scripting and guidelines walk users through your processes, so they are less likely to make a mistake
- Health Desk documents every action taken on a telehealth encounter, so you have the data your organization needs to protect itself

## **Revenue Optimization:**

- Health Desk reduces scheduling errors and missed appointments with Intelligent Scheduling
- The waitlist feature automatically fills in lost revenue from cancellations
- Round robin features help fill schedules of new providers
- Patient self-scheduling / re-scheduling allows patients to find appropriate times that match your scheduling rules and notify those in line that a new slot is available
- Mass rescheduling allows you to respond to unanticipated emergencies (like a snowstorm) with minimal loss of revenue
- Steer patients towards the right appointment types, including telemedicine

## **Lower Costs:**

- With a single interface that guides users through every call type, workflow, email, paging, scheduling, while auto-documenting all actions – this lead to:
  - Training is drastically cut with a one-page, guided patient interview
  - Mistakes, data entry errors, their research and correction are minimized
  - Call handle time is reduced by at least 30%, with all integrations implemented

And, most important, it leads to a greater level of care for every patient.

Visit [KeonaHealth.com](https://KeonaHealth.com) to learn more.

## **About Keona Health Inc.**

Keona develops software to improve communication in the healthcare industry. The flagship product, Health Desk, is a Healthcare CRM and Telehealth platform that provides best care to patients and superior tools for those who serve them.

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