



NeoCrep
Consulting

How to Choose a CRM Solution For Your Healthcare Organization

Healthcare customer relationship management (CRM) is big business. A recent study by Grand View Research reports that the global market was worth \$6.6 billion in 2015, and is expanding at a compound annual growth rate of 9.5 percent. A full 60 percent of US hospitals use some form of CRM solution already – and that percentage is increasing every year.

The reasons for this growing CRM adoption are no secret: patients' expectations are higher than ever before. Today's patients demand seamless personalized communication in the office, on the web, and on every device they use. Meanwhile, tightening regulations are raising the pressure for health organizations to adopt secure digital records, and to standardize communication among doctors, referrers and other caregivers.

But the motivations aren't all on the negative side. By automating the busy work of scheduling appointments and follow-ups, adding and updating patient records, and reaching out on the phone and on social media, the latest healthcare CRM platforms are empowering doctors and other health professionals to do their jobs more easily and effectively. Healthcare organizations that adopt CRM solutions, and leverage them correctly, are witnessing unprecedented growth in new patient acquisitions, positive reviews and referrals, and organizational efficiency and productivity.



The big question of course, is how to choose the right CRM software for your healthcare organization. This healthcare CRM comparison is designed to help answer that question – not by telling you which specific solution to choose, but by providing you with the basic facts and resources you'll need to reach your own conclusion.

To begin, let's take a closer look at the reasons for adopting a CRM solution in the first place – focusing particularly on reasons specific to the healthcare industry.

Why your healthcare organization needs a CRM solution

The healthcare industry is more competitive than ever before. Brand-new care facilities, providers and treatments appear on the marketplace every year – but even more to the point, the entire industry is undergoing a massive shift toward patient-centered care.

As more providers upgrade to standardized electronic record-keeping, and the Affordable Care Act (ACA, or “Obamacare”) mandates coverage for a majority of Americans, patients are realizing they have the power to choose between healthcare providers – and if your quality of care doesn’t meet their expectations, they won’t hesitate to switch to one of your competitors.

What are these new patient expectations? For one thing, any patients now report that they want closer relationships with their doctors. And many doctors agree – a full 76 percent say closer relationships with primary-care physicians would help patients obtain better medical care. Meanwhile, patients are more willing than ever to explore a range of treatment options, and, if necessary, to upgrade to a provider who pays more attention to the details of their case.

This shift in attitude represents a major transformation in the dynamic between patients and providers – thus, it demands a reinvention of your approach to patient relationships. Doctors and nurses at your facility need to be empowered to meet each patient with a full timeline of health history and past visits, along with notes on previous conversations. And before and after each visit, your organization needs to take proactive steps to cultivate positive online reviews, and keep your patients engaged and interested in their ongoing course of treatment.

The good news is that powerful new tools exist to help your team keep track of each patient’s health, history, personality and expectations – and to keep your organization top-of-mind between visits. Although the core principles underlying these tools originated in other industries (such as corporate marketing), some are adapted specifically for use in a healthcare environment. In fact, research has demonstrated that healthcare CRM software consistently boosts providers’ overall efficiency and productivity in treating patients.



But to obtain these benefits, it’s absolutely crucial to choose a healthcare-specific customer relationship management (CRM) platform – because the healthcare industry places unique demands on doctor-patient relationships, and on medical records. Your CRM software’s approach to organizing patient records and marketing activities needs to be structured in a way that aligns with the functioning of a health care organization.

For example, all your patient data needs to be stored in ways that comply with

the Health Insurance Portability and Accountability Act (HIPAA) and other relevant privacy regulations. According to the 2016 Healthcare Data Breach Report, healthcare organizations suffered 450 breaches of protected health information (PHI) in that single year – and paid out more than \$22 million in patient settlements as a result. These are very real risks, and demand solutions that encrypt sensitive patient data, and provide secure backups in case of an emergency.

At the same time, certain criteria apply when choosing a CRM platform for any industry. These factors will help you evaluate the effectiveness and usefulness of each CRM solution you're considering. Let's take a closer look at those elements.

Questions to ask before choosing a healthcare CRM platform

Although all the pressures discussed above point to the need for a CRM system, this doesn't mean that simply purchasing a CRM solution will solve all your problems. Before even choosing a specific platform, you first need to pinpoint your organization's shortcomings, and figure out exactly what you want your CRM system to do. Your answers to these questions will be as unique as your organization – but it'll help to begin with a list of general points to investigate.

First, ask yourself which specific tasks you want your CRM system to automate. For example, you might want the platform to automatically organize patient records, and store them securely in a HIPAA-compliant vault, as soon as they're entered into the system. You might want the software to email patients' history and complains to doctors before they arrive for appointments, and email patients on a specific schedule to remind them of upcoming office visits. CRM platforms can automate all these tasks, and many more – so start by making a list.



As you compile your list of automation tasks, think about the overall processes you want your CRM software to manage. CRM platforms are adapted for a wide range of industries and processes, from mass marketing to business deal-making – and of course, patient relationship management. Consider the ways in which you communicate with your patients, as well as how doctors and other caregivers in your organization communicate with one another. Your CRM solution needs to align with all these processes.

It's also essential to consider the learning curve and adaptability of your CRM platform. You'll most likely need some expert help to get that system up and running, and configured for the needs of your organization. Then you may need a few training sessions to get a core team ready to use the software on a daily basis. From there, you'll be rolling it out to a whole team of medical professionals – some of whom may not be particularly tech-savvy – and you'll probably continue to add functionality over time as your organization grows. Be sure to choose a platform that's relatively easy to learn, and is flexible enough to grow and adapt as you do.

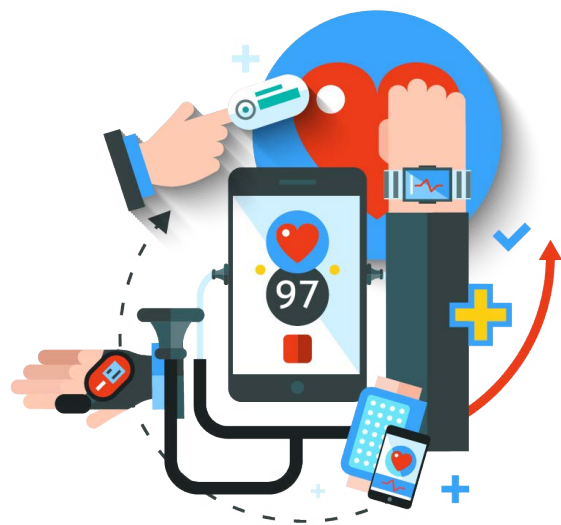
Along the way, think about other systems and platforms with which your CRM solution will need to integrate. For example, you've already got a solution in place for electronic medical record-keeping. Will your CRM software need to communicate directly with that system? What about your accounting software, email system, and website? You may not need all these integrations – or, on the other hand, you may require others not covered here. Put together a list, and double-check that your CRM platform will be able to talk to all the other systems it needs to.

Finally – and perhaps most importantly of all – your CRM solution needs to be secure enough to protect against privacy breaches and lawsuits. While no CRM platform can provide the level of ironclad PHI security necessary for full HIPAA compliance, you'll definitely want a system that encrypts sensitive data, provides regular backups in case of a malicious attack or other breach, and offers multiple levels of access control, so only certain specialists can retrieve private patient information. Take a close look at state and federal laws about data storage, and make sure your CRM solution fully complies with all of them.

Key steps of choosing a healthcare CRM system

Once you've put together a list of key considerations for your CRM platform, it's time to begin zeroing in on the specific platform you're going to use. This process can take some time – but it's well worth investing that time up-front, because the costs of switching to a different platform can be extremely high. Take it one step at a time, and you should be able to avoid most problems. Here's a step-by-step guide to the process.

You'll want to start by getting an overall picture of the state of the CRM software



market. Start with a simple Google or YouTube search – then browse blogs, watch videos, and read articles, to get a sense of (for example) the differences between web-based and on-premise CRM solutions, between various industry-specific platforms, and between business-to-business (B2B) and business-to-customer (B2C) CRM systems. Even if you've already got some familiarity with the CRM marketplace, make sure you're up to date on the latest healthcare CRM software trends, terminology and capabilities.

Now that you're working with a clearer picture of the marketplace as a whole, you're ready meet with the managers in your organization, and make the case for adoption of a CRM solution. Even if you're the primary decision maker, it's still crucial to get managers on board with the decision, because you'll need their help to ensure buy-in and compliance throughout all teams. The managers may take some convincing – so here's where you'll want to roll out all the arguments: greater efficiency and productivity, improved patient care, less likelihood of mix-ups, and stronger regulatory compliance. Make sure everyone understands that those benefits outweigh the costs.

With the managers backing you up, it's time to put together a shortlist of CRM software vendors who might meet your organization's needs. This is where your list of requirements from the section above will come in particularly handy. Narrow your selection down to five systems (or fewer) that automate the right types of tasks, manage the right processes, provide a relatively easy learning curve and a high level of adaptability, integrate seamlessly with all necessary systems, and provide a high level of security and regulatory compliance.

Your next step is to approach each of the vendors on your shortlist, and explain your interest in their software, the needs you expect them to meet, and the criteria by which you'll be evaluating them. The more clearly they understand your requirements and criteria, the more effectively they'll be able to present their platform's benefits, and demonstrate their ability to deliver on your expectations. Make sure you keep each vendor abreast of your timeline, and always feel free to reach out to them whenever you need clarification.

As your vendors begin to respond with pitches, you're ready to evaluate the demos of each platform. Make sure you go into each demo with a basic script of the workflows you want to evaluate, along with a list of "must-haves" and "nice-to-haves." Prepare a scorecard of the pros and cons of each solution. Keep track of specific features of each platform that impress you, along with aspects that could be cause for concern. Meet with your managerial team after each demo, to make sure you're all on the same page. And if you can't quite come to a consensus, ask the vendor to provide a second demo that dives deeper. They'll usually be happy to.

While you're evaluating each platform's pros and cons, you'll also want to gather price quotes. Each vendor is likely to have a different pricing structure, with some charging per user per month, others requiring upgrades for specific features and integrations, and still others charging by the amount of data storage. To simplify the process of comparing prices, ask each vendor for a single all-inclusive quote that covers all the add-ons, integrations, data storage, users, support, training and other features you'll need. This will help you compare each platform's pricing on an "apples-to-apples" basis – at least as much as possible.

Once you've got your price quotes in hand, you'll want to verify that the vendor and product can actually deliver on all the promises they've made. Tell your top-choice vendor that you've decided to move forward with them – but first, you'd like to check with their references. They should be happy to put you in touch with several other healthcare organizations who've been happy with their product. When you speak with these references, don't be shy about asking the tough questions. Ask about challenges they've faced, support cases they've filed, and criticisms they've made. Get a clear picture of how the vendor responds in case of a crisis. And last but not least, make sure the vendor is going to stick around over the long term, by asking for proof of their financial condition.

Now that you've chosen a vendor and verified their credentials, the final step is to take a close look at the software license agreement, and negotiate for the best deal possible. Double-check that your license covers all the users you'll need. Keep a close eye out for "auto-renew" clauses, and make sure you've got an "out clause" in case any problems emerge down the road. And it never hurts to ask for a discount at the last minute – especially since you plan on being a loyal long-term user.



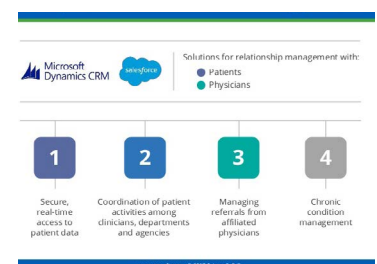
The top five CRM platforms for healthcare organizations

Although a dizzying variety of CRM platforms brand themselves as ideal solutions for every industry, the truth is that only a small number of CRM systems are adapted for the unique requirements of healthcare. Before you put any solution on your shortlist, you'll want to verify that it's designed for privacy and security, and for the workflows of a healthcare organization. The easiest way to do this is simply to check whether health professionals already use the software.

One of the top healthcare CRM systems is Evariant, which brands itself as a solution targeted at helping hospitals build stronger patient relationships. This platform provides robust, secure tools for gathering and organizing patient data, and for analyzing that data in order to drive actionable insights about marketing efforts and other new initiatives. In fact, the software provides a full suite of healthcare CRM features for planning and automating outreach campaigns across multiple digital channels – and for increasing referrals, acquiring new patients, enhancing doctor-to-patient communication, and closing the loop on payment collection.



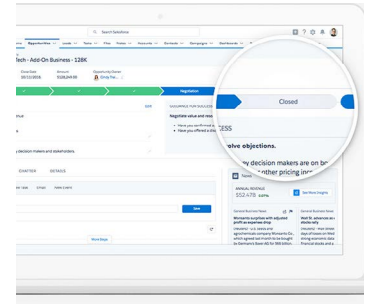
With 12 years of experience in healthcare IT, ScienceSoft remains one of the top CRM solutions for improving quality of care and raising patient satisfaction. This platform offers tools for 360-degree profiling of prospective and current patients, and for outcome focused management of chronic diseases, in the form of automated notifications and alerts, and streamlined communication with referring providers and other caregivers. Built-in analytics track patient experience through a range of objective metrics, delivering actionable insights. And a full suite of communication tools empower your team to provide consistent care across all channels, from the office to social media.



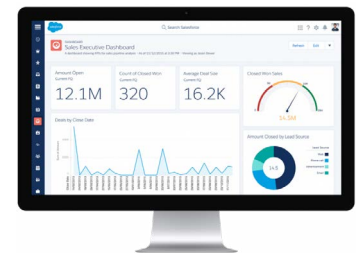
Another of the most popular healthcare CRM companies is Deskera, which prides itself on being easy to set up and use, while providing full compliance with HIPAA and other privacy regulations. This software integrates smoothly with patient care and billing records, as well as with back office accounting systems, as well as the content management systems (CMS) used to manage your website and social media accounts. It includes tools for tracking patient interactions across multiple touchpoints, and for cultivating positive reviews and referrals online.



Some healthcare providers have reported success with Salesboom – which actually serves a wide variety of industries, but provides solutions tailored specifically for health organizations. The software provides a set of tools for helping your organization stay connected with patients in between visits, via email, social media and other channels. It also offers a toolkit aimed at connecting your institution with referrers, in order to maximize new patient acquisition. By integrating these two toolkits with in-office systems, the software aims to help streamline many data entry and marketing tasks, while minimizing error and providing consistency across visits.



Finally, SalesForce Health Cloud has earned its reputation as an effective solution for improving patient acquisition, raising quality of care, and engaging patients over the long term. The software is based around the concept of one-to-one “patient journeys,” providing tools for delivering a connected patient experience across every touchpoint, from the office to the call center to the Internet. It also offers a set of collaboration tools for simplifying communication with other teams of health professionals – all within a single adaptive interface.



Conclusion

The question of how to choose the right CRM system doesn't boil down to any single consideration – instead, it depends on a wide range of interrelated factors, including the structure of your organization, the ways in which you communicate with patients and referrers, the users who'll need access to the platform, the amount of data you'll need to store, and the budget with which you're operating. Before adopting any particular healthcare CRM strategy, you'll want to talk in detail with your management team, and hear what each vendor has to say.

CRM practices in the healthcare industry continue to evolve every year, as patients' expectations increase, providers proliferate, technology evolves, and regulations tighten. The dynamics of CRM in healthcare will likely look significantly different five years from now than they do today. Thus, it's crucial to choose a CRM vendor who'll work by your side over the long term, adapting and adding new features to suit your organization's developing needs.

With the help of resources like this article, you're well-equipped to begin making an informed decision. Think critically and choose carefully, and your healthcare CRM solution will provide measurable ROI for decades to come.