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EXECUTIVE SUMMARY

CX in the Healthcare Industry

Patient Experience Management and Patient Engagement: Best Practices, Key Market Trends, Case Studies, and Market Forecasts

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ANDREW BRODERICK

Senior Analyst

CLINT WHEELOCK

Managing Director



Section 1

Executive Summary

1.1 Introduction

Today, patient engagement and patient experience are areas of significant interest, focus, and concern in the US healthcare system and globally. Healthcare consumers' expectations today require providers to be more customer-centric. Healthcare consumers expect to be treated as whole persons with individualized needs, not as problems to be solved, and they demand greater convenience, better access to care, and more seamless experiences.

As the experience economy becomes the new currency among healthcare consumers, improving the healthcare customer experience has become a strategic priority for healthcare providers in their efforts to build brand loyalty, retain customers, and drive profitability. Although the market environment is driving organizations to act, the healthcare industry's capacity to use technology and data to operationalize a consumer-centric patient experience model currently lags that in other industries. However, it is only a matter of time before their capacity will advance to transform the industry.

Patient experience (PX) has long been viewed as an integral component of delivering quality care. A healthcare organization's capacity to differentiate itself on PX outcomes can have a significant influence on clinical and financial performance. Healthcare organizations have historically tracked PX because of regulatory and payment mechanisms that have provided strong financial incentives. For example, post-visit satisfaction surveys had monetary benefits linked with payments received for the quality of care delivered. Today, many healthcare executives identify improving consumer experience as a top business priority. The elevation of PX as a key business objective for healthcare organizations is critical to their maintaining viability in a market proliferating with consumer choice, and where strategies to improve PX are key to gaining competitive advantage in the battle for brand loyalty and customer retention.

One might expect patient experience management to be no different from that of consumer experiences in other industries. However, efforts to operationalize patient experience can prove more challenging due to complex industry regulations and business processes specific to healthcare. And despite healthcare organizations possessing vast amounts of data on their customers, which offers unlimited potential to deliver comprehensive and individualized insights into healthcare consumers, their capacity to leverage that data and generate actionable consumer experience insights in real-time has to date lacked that in other sectors. Both payers and providers are now starting to leverage data and technology in redesigning the care model to be patient-centered, preventive, personalized, and participatory, augmenting human workflows to better inform, personalize, and improve care, and coordinating services in a unified manner to address an individual's broader social needs.

As consumer loyalty and retention become key drivers of profitability for healthcare providers, patients increasingly have more choices as to where and when they access and receive care. In a market where brand loyalty and customer retention are increasingly important competitive differentiators, patients want:

- Access and convenience (e.g., affordable care, ease of navigation, and frictionless continuity)
- To be seen as an individual and treated with respect
- To be engaged, consulted, and involved in decisions
- To trust, feel safe and cared for by their healthcare providers

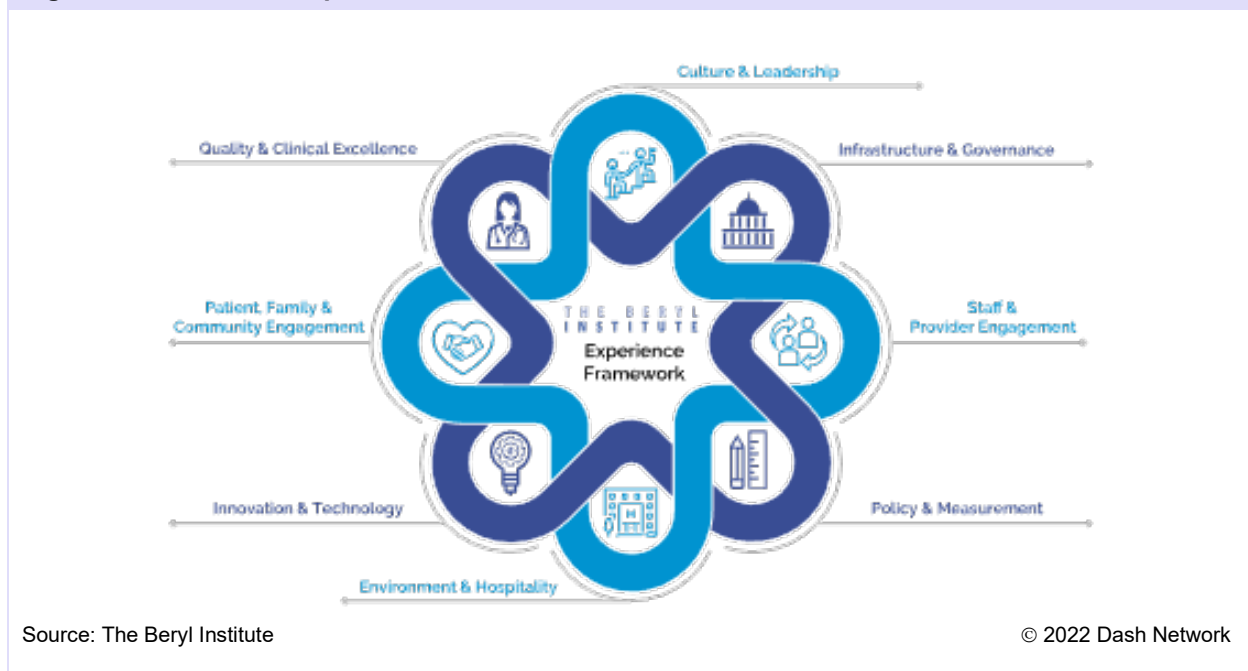
The pandemic drove the healthcare industry to rapidly adapt to and accommodate consumer expectations, but now requires it to restore consumer trust in institutions and their leaders. As more consumers have turned to digital platforms to access care, their demand for convenience through digital doors continues to increase. With patients demanding a reframing of patient experience, healthcare providers need to address what patients care about in their care and interactions, while recognizing they are less willing to compromise on their care experiences.

There are reasons for optimism when it comes to the market opportunities for improving patient experience. Healthcare organizations that prioritize PX understand that it signals their commitment to the patient, and also has the potential to establish the foundations for building deeper relationships that will contribute to improving care outcomes. From an operational perspective, healthcare organizations also recognize that provider behaviors play a role in PX management through the impact that their interactions with patients can have. Underscoring this recognition is their dual commitment to better support and address workforce experience as critical for delivering superior patient experience. The net result is that PX improvement efforts play a critical role in helping organizations establish competitive advantage in the battle for customer and workforce loyalty and retention.

1.2 Market Definition

Although no standard definition for PX has been adopted industrywide, various definitions in use share common concepts that are the foundations for achieving superior PX outcomes and that contribute to a shared understanding of what is in essence at the core: the human experience of the patient across the continuum of care. **The Beryl Institute** characterizes the integrated and multidimensional nature and inherent complexity of patient experience in its definition as: *the sum of all interactions, shaped by an organization's culture, that influence patient perceptions, across the continuum of care*. The Beryl Institute's Experience Framework reinforces the integrated nature of the healthcare experience. As a result, individuals' interactions with providers, and not just their health status or role as consumers, is central to understanding PX and informing strategies to improve experiences.

Figure 1.1 Patient Experience Framework



Aspects of healthcare that distinguish the consumer experience from those in other industries include:

- The **spectrum of service interactions** across a broad range healthcare goods and services (e.g., health plans, care providers, consumer packaged goods) and across a continuum of life stages (e.g., health, sickness, advanced illness, end-of-life care).
- The **importance of the human relationship** between patients and providers, and capacity of providers to meet patients where they are to deliver patient-centered care (e.g., access, timeliness, communication) that is respectful and responsive to individual patient preferences, needs and values.
- Regulatory **compliance with industry-standard measures** (e.g., Consumer Assessment of Healthcare Providers and Systems, or CAHPS) to monitor and assess the organizational capacity of providers to deliver patient-centered care, as well as to identify areas of performance for continuous improvement.
- The **advancement of scientific understanding** of the relationship between PX outcomes and patient engagement, activation, and compliance in care which can lead to improved clinical outcomes and patient safety practices, and lower utilization of unnecessary or preventable healthcare services.

Equally important to PX management efforts is the interrelated concept of patient engagement and its direct relationship with patient experience outcomes. Effective patient engagement practices comprise mechanisms that providers can offer patients to support actions or behaviors for them to actively engage in care, while PX is the sum total of *interactions* that a person has with healthcare providers throughout their care journey. For example, patients can *engage* to receive health education, ask questions about care, or schedule regular appointments. With relationships at the core of patient engagement practices, providers view each patient engagement touchpoint as an opportunity to influence each patient experience and contribute to the overall patient experience.

As a result, strategic initiatives to manage and improve patient experience comprise three core features:

- **Interaction** – PX is made up of many touchpoints, including the digital and in-person interactions between the patient and anyone or anything connected to their care.
- **Continuum** – PX includes the full spectrum of care services, not just interactions in the physician's office, that also affect a patient's level of satisfaction with their care.
- **Perception** – The ultimate assessment of PX is the perception patients themselves have of this collection of interactions throughout their journey, and how it compares to their expectations with care.

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10.1 Scope of Study

Sample scope of study: This Dash Research report examines the market issues, drivers, and barriers for CX and CE software platforms, software applications, and services targeting the retail industry. The retail market is defined as any organization (online or offline) that primarily sells its products directly to customers and receives payment at the time of the sale. The category includes establishments across a variety of categories, including apparel, electronics, home goods, supermarkets/food, pharmacies, books, sporting goods, jewelry, big box, musical instruments, home improvement, and other categories, but excludes hospitality establishments, such as restaurants, motels and hotels, sporting events, resorts, and casinos.

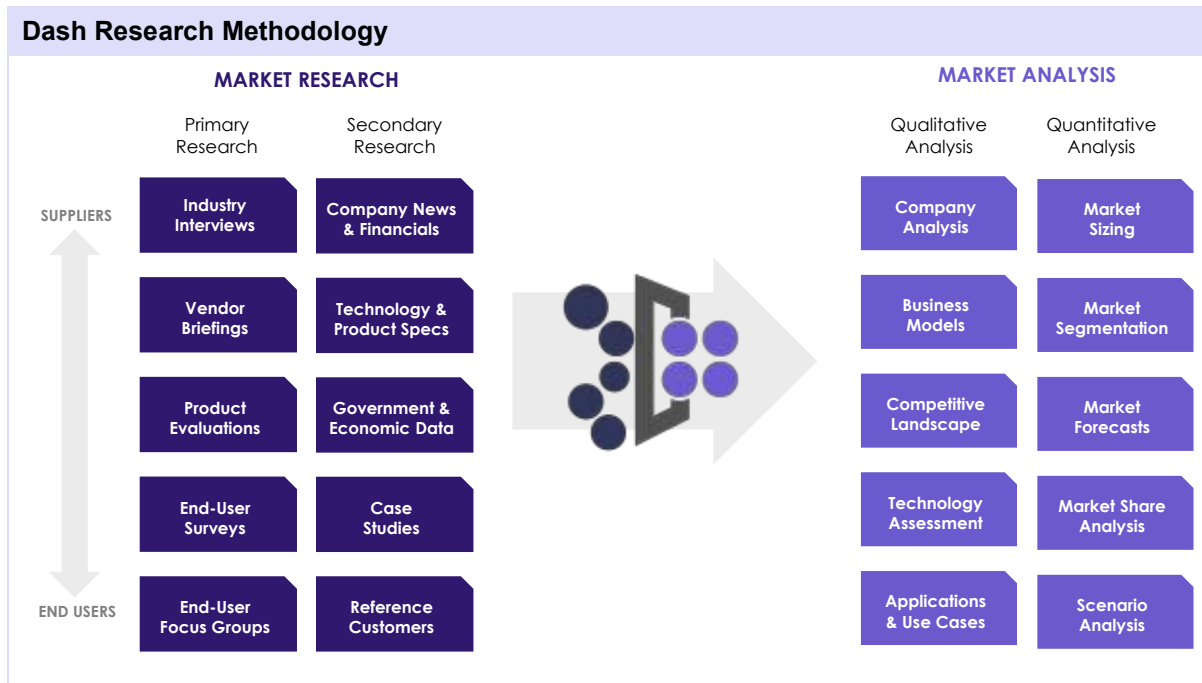
10.2 Sources and Methodology

Dash Research is an independent market research firm that provides industry participants and stakeholders with an objective, unbiased view of market dynamics and business opportunities within its coverage areas. The firm's industry analysts are dedicated to presenting clear and actionable analysis to support business planning initiatives and go-to-market strategies, utilizing rigorous market research methodologies and without regard for technology hype or special interests including Dash Research's own client relationships. Within its market analysis, Dash Research strives to offer conclusions and recommendations that reflect the most likely path of industry development, even when those views may be contrarian.

The basis of Dash Research's analysis is primary research collected from a variety of sources including industry interviews, vendor briefings, product demonstrations, and quantitative and qualitative market research focused on consumer and business end users. Industry analysts conduct interviews with representative groups of executives, technology practitioners, sales and marketing professionals, industry association personnel, government representatives, investors, consultants, and other industry stakeholders. Analysts are diligent in pursuing interviews with representatives from every part of the value chain in an effort to gain a comprehensive view of current market activity and future plans. Within the firm's surveys and focus groups, respondent samples are carefully selected to ensure that they provide the most accurate possible view of demand dynamics within consumer and business markets, utilizing balanced and representative samples where appropriate and careful screening and qualification criteria in cases where the research topic requires a more targeted group of respondents.

Dash Research's primary research is supplemented by the review and analysis of all secondary information available on the topic being studied, including company news and financial information, technology specifications, product attributes, government and economic data, industry reports and databases from third-party sources, case studies, and reference customers. As applicable, all secondary research sources are appropriately cited within the firm's publications.

All of Dash Research's reports and other publications are carefully reviewed and scrutinized by the firm's senior management team in an effort to ensure that research methodology is sound, all information provided is accurate, analyst assumptions are carefully documented, and conclusions are well-supported by facts. Dash Research is highly responsive to feedback from industry participants and, in the event errors in the firm's research are identified and verified, such errors are corrected promptly.



10.3 Forecast Methodology

Dash Research has taken a multifaceted approach to developing its forecast model. A scan of the market was undertaken to identify a market ecosystem consisting of companies serving the healthcare market, including small, medium, and large players, across seven key CX functional areas: contact center; personalization & optimization; customer feedback; customer data & analytics; customer relationship management; customer data platform; and employee experience.

Using a combination of company-supplied data (annual reports, press releases, analyst conference calls) and public and subscription-based company databases, an assessment of each company's revenue was captured for the base year of 2019. Further assessments on the amount of revenue that was directly attributed to CX platforms, applications, or services were made, along with an assessment of the revenue level attributable to healthcare customers, which were cross-checked against customer lists, press releases, and industry news reports.

To forecast the potential market value, industry growth rates from several sources were collected and analyzed, and applied as a baseline growth rate for the industry. Then, segment growth rates were calculated by implementing technology adoption growth curves for each region and functional area, taking into account the internal market dynamics and external economic factors that impact the retail market.

The forecast is not without limitations; many of the functional areas overlap, and Dash Research's categorization relies not only on vendors' classification, but on an assessment of what the company's products and services actually allow a retailer to accomplish. Further, while Dash Research has attempted to capture a wide-ranging and comprehensive ecosystem of companies, the definition of what constitutes CX software and services is highly variable. Dash Research has focused on companies that offer solutions that are clearly focused on CX, as opposed to marketing automation, sales automation, or other related applications.

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© 2022 Dash Network LLC
445 Union Blvd., Suite 101
Lakewood, CO 80228 USA

+1.720.603.1700

info@dashresearch.com

www.dashresearch.com