In Seeking the Right Tracking Tool, Don't Undercut Your Strategy: Three Important Steps To Take Before Developing A Physician Tracking Tool via CRM

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By Suzanne R. Dewey

Efficiency Isn't Just About Technology

If you want to create a more efficient process to track your physicians, you may be focusing too much on the tool and not enough on your strategy. In many hospitals and healthcare organizations, the push to create more efficient processes through technology is a familiar and even welcome pressure. Marketing personnel especially are becoming familiar with a host of new technological and web-based tactics. Customer Relationship Management (CRM) systems provide one such tool that many organizations are employing. Based on the national survey conducted by Corporate Health Group (CHG) in the autumn of 2006 in conjunction with Strategic Healthcare Communication,[*] healthcare organizations are using a variety of CRM tools for physician and patient tracking but the results are mixed.

Looking beyond healthcare, CRM tools abound. And yet, the efficacy of the tool has much more to do with the strategy and foundational approach an organization takes to building customer relationships than the nuances particular to the actual tool. The key to success with developing your physician relations tracking program takes a reflective journey. Key points along the path include the following pit stops:

- Why establish a CRM system?
- Understanding CRM program choices
- One essential internal assessment step

Essential To Understand

CRM is a strategy for reaching your patients or physicians. You use tools, such as software programs to help you do this, but the organization needs to start with an overarching strategy for bringing about a closer connection to your targets – physicians or patients. Too often organizations look to the software solution to define the process and think the answer to relationship building is in the tool itself. This sentiment brings on significant frustration and re-doubling of efforts.

[*] Forté Partners, LLC is a strategic affiliate of Corporate Health Group. Suzanne Dewey was one of the survey's authors.

What Is CRM, Really?

Let's start with what CRM actually is. CRM , customer relationship management, is the process organizations employ to reach out to their clientele, customers, or prospects to develop and manage a relationship. In healthcare, the term is often associated with tracking tools for physicians and/or patients.   For the purpose of this paper, we will use physician tracking to frame our discussion for CRM.

I. Business Case for a Physician Tracking Tool

Hospitals understand that growing in their markets cannot be achieved without appropriate physician alignment. For years now, hospitals have worked on developing and re-tooling physician relations departments to help maintain and grow market share. Some hospitals have small teams and other organizations have a liaison for every service line. Regardless of the size or the structure, the common and essential denominator is to nurture the physician relationship.

Knowing Who Is On First: Avoiding A Clumsy Two Step

With your physician relations program "front and center" in the tactical mix, the need to track and measure nurturing activities is a basic outgrowth. The information flow works in both directions so that significant market intelligence is collected as these physician-hospital relationships are cultivated. The more individuals working on the physician-hospital relationship, the more navigation is required so that the physician is not overwhelmed by a disorganized flow of information from various hospital sources. A physician will not be impressed when she provides a rationale for not referring to the new gastroenterologist to the physician relations liaison one day only to be visited the following week by the service line representative asking the same question. Not only does this look clumsy, but it wastes the physician's time and valuable organization resources in a two-stepped and uncoordinated approach. The technology actually serves the process by easing the management and integration of information.

"I Knew That…Did You Know That?"

The hospital wants to collect incoming information about the physicians and the market. Often information is collected in the marketplace that never reaches the department or team that needs to respond to this information. If a new urologist, affiliated with a competitor, is moving into a referring physician's office building, that information is useful to the physician relations team, the physician recruiter and the any service line affiliated with urology – women's services, oncology, etc. Information when shared becomes that much more effective.

Customer relationship management helps organizations gain insight into the behavior of their customers and modify their business operations. This can ensure physicians and patients are served in the best possible way. This can be done through data analysis of behavior and patterns or can be very simple in terms of understanding the psychological status of a new recruit. Imagine if one of your new physicians is feeling isolated; CRM helps organizations recognize and pay attention. Perhaps establishing a mentor for the new physician is the answer or putting them on the CME series for referring physicians will help. The idea is simple – focus on the customer of value. The effort gains strength when issues impacting your customer are managed responsively. The more an organization knows about its customers, the better equipped that organization can be in responding to customer needs. While a CRM tool can help collect and analyze this kind of information, it is the overall strategy and culture of the organization that puts energy behind this information and creates a responsive process.

"I've Stopped Complaining Because Nothing Ever Changes!"

CRM tools can help create a repository of information available for any system user. While CRM tools can help provide information necessary to more appropriately coordinate visits and events with physicians, don't leave out the physician complaint. Physicians value efficiency, for example, if they take the time to share a concern about patient flow in the surgical suite with the Vice President of Medical Affairs, imagine their pleasure when the Operating Room Nurse Manager contacts them about changing that patient flow. Physicians will soon believe their input is respected and important.

"What Do They Do, Anyhow?"

When an organization works hard to change their physician facing operations and is making a positive impact on overall physician relations, don't keep this a secret. Report out on activities, events and outcomes so that the overall organization understands the value of physician relations as a function and as a department. But, don't make your personnel spend laborious time generating these reports – most CRM tools have good reporting functions that can provide data to profile and guide tracking endeavors.

Tracking System Benefits In A Nutshell

The technology can enhance the department and organization's functions by providing greater efficiency:

- Information is stored in one place for access
    - Reduces un-coordinated but well intended outreach efforts
    - Market intelligence is available as soon as it is logged into the system
    - Access to essential data is provided to all users

- Communication is enhanced
    - Policy changes or announcements can be viewed anytime
    - Scripting tools are provided
    - Key messages are underscored

II. The Crowded Arena for CRM Tools

In the CHG/Strategic Healthcare Communications 2006 survey, hospitals reported use of a variety of different mechanisms to support their relationship-building efforts with physicians:

Excel or other spreadsheet	26%
ACT! other spreads	21%
Home grown	21%
Paper system	14%
Access	13%
GoldMine	12%
Market Ware	8%
Other (SalesForce, E-Centaurus, SalesLogix ContactWise, Echo Access, Meditech File Maker)	11%

These results show that 40% of the survey respondents are still using fairly rudimentary tools (paper or spreadsheets) to track their efforts. Even more interesting is that only one-third of the 174 reporting organizations indicated satisfaction with their tracking tools. And it was not just the users of rudimentary systems that expressed dissatisfaction. Frustration was cited for all system choices. This finding points to the need to assess the work process and build out the operational elements <u>before</u> adding a technological overlay to the system. Remember the tool cannot define the market territory or assign priority levels to key physicians. Nor can the tool develop your issue resolution process. Know what you want to capture first and then seek out the tool that can help implant your vision.

No Market Leader for Healthcare Organizations, Yet

There is no clear market leader who offers just the perfect set of choices for a CRM tool. We know from the 2006 survey that hospitals are trying and using many different programs. The CRM vendor field has many new players since that survey was conducted.

Different Flavors

Essentially there are three different flavors of CRM programs and each has benefits. Which one you choose depends on your organization's particular needs. You might be concerned about cost or data security. You may want a program that integrates across your entire organization or you may have no substantial IT resources and may need to rely on a hosted option. While there is some overlap within these categories, the basic flavors include:

- Off-the-shelf programs
- Installed or enterprise programs

- Web-based or vendor hosted systems

Off-the-shelf Programs
The most common off-the-shelf options include ACT! and GoldMine. There are several software companies that offer CRM applications that integrate with existing packages but trimmed down versions may be appropriate for smaller businesses. Using off-the-shelf versions is typically less expensive because you are investing in standard software components. While you can do some tailoring of these off-the-shelf programs, they may not always do what you want or need. There will be a balance point between functionality, convenience and cost.

Many organizations like to have their off-the-shelf programs "customized" to meet their specific needs. There is no such thing as a fast solution. Again, make sure your process is mapped out and understood before seeking the right "fit" with a specific product. While off-the-shelf solutions are typically less expensive than some other options, that doesn't mean these solutions are inexpensive. Most organizations will need more than one license – while it isn't always a one to one ratio, consider getting the same number of licenses as you have users. As you consider your customization needs, remember that changing contact labels from "company" to "practice" is one thing. Getting these products to match your processes may be more complicated.

For example, with GoldMine, the opportunity tab can be configured to handle issues versus new opportunities. It may not be simple or easy but it can be done. Essentially you need to know that it is a process and there is no fast solution or silver bullet. Using an off-the-shelf product does not mean buying the software from Staples today and using it tomorrow. Off-the-shelf does not necessarily translate into fast or easy.

Installed or Enterprise Programs
Enterprise customer relationship management is a family or a suite of tightly-integrated applications that can encompass both your front and back office operations. These solutions – which can include sales, marketing, contact center, and help desk automation systems – are designed to "seamlessly" coordinate and consolidate the disparate, repetitive processes and "siloed" data that often exist in healthcare organizations. By using enterprise CRM, all sales, marketing, service, and support staff can share information and work in a coordinated fashion to build stronger, more profitable relationships. Most recently Microsoft Dynamics CRM has gained a strong reputation but there are many other solutions in the market including Oracle's Siebel CRM products and Right Now CRM.

Enterprise customer relationship management has become a way for larger businesses to streamline customer-related processes across divisions while simultaneously increasing efficiency and effectiveness of customer transactions. These features can be brought into the healthcare organization with significant planning and customization of the solution to integrate the existing work-flow processes. Enterprise solutions focus beyond the department level.

Enterprise CRM is meant to work across multiple functions and not just one function level. Unless you are a large organization and have already been benefiting from some technology solutions for many of your functions, Enterprise CRM is a very big leap. Healthcare organizations should consider building incrementally – for cost reasons, fit issue and most importantly personnel utilization.

Installed programs, on the other hand, may be targeted for a single department. There are specific physician tracking and recruitment programs on the market that are installed onto the hospital's servers. They are a cross between an off-the-shelf program and a focused enterprise solution that resides within your organization's firewalls.

These focused programs do not require significant tailoring because they are already geared for physician tracking or recruitment. The screens and tabs are organized around the medical practice, the individual physician, action planning and even issue management.

Web-based or Vendor Hosted Offerings

One of the more notable web-based CRM programs is SalesForce.com. Most CRM tools have similar platforms for their basic offerings. What makes the various programs unique is how they work with your organization through service issues and certainly implementation. SalesForce.com is a web-accessed program, typically used by larger organizations. Keep in mind that many CRM solutions are focused on sales and outreach and less on the service elements that physician relations programs often focus on.

We all know that healthcare is unique! Because of the payment/reimbursement mechanism, our customer portfolio is complex. Certainly the patient is our customer but so is the physician. This makes CRM utilization a bit more complicated. HIPPAA regulations also make our outreach endeavors sensitive and complex. Trying to work with an outreach tool that is complex but not experienced with the nuances within healthcare is hard work. Sometimes using a CRM solution specifically designed for healthcare is the answer or at least the interim answer. You can begin using one CRM solution that may not be the final answer to all of your issues but is the incremental fix and is a good starting place for automating some of your outreach and service activities.

These vendors provide a solution for your organization that is hosted on the internet. There is no hosting done internally and access to these programs is tied to internet availability. Using these types of programs works well for organizations that want to implement a solution in a relatively fast timeframe and may not have considerable internal IT skills to tackle the job from scratch.

As with Enterprise CRM, there are many vendors in the marketplace who offer solid web-based CRM solutions – Entellium, Maximizer, Infusion CRM, Etelos CRM for Google has an offering and as mentioned earlier SalesForce.com

Some of the benefits for web-based CRM include:

- Low Total Cost of Ownership – due to lower cost of implementation and deployment.
- Rapid deployment
- Accessibility -- users can access web based CRM from anywhere as long as they have internet availability.
- Pay-as-you-go -- you will not have ownership to the solution and your fees are typically billed in a subscription process.

III. Considerations – No Matter What Flavor

There are many CRM solutions available in today's market, each with different features and different delivery mechanisms. With so much choice, you cannot say one solution is better than another. It is important to employ a variety of view points as you assess your needs, make sure you have investment from senior management and your end-users. Analyze your needs in task-force formation. You can approach your assessment in many different ways but the one must-do in implementing a CRM system: **push your organization to decide upon specific needs and concerns before obtaining a solution,** actually even before you start looking at different vendors. Use the following considerations checklist to guide your analysis:

- What are your process needs? (the following are examples and do not represent an exhaustive list)
    - Collecting and profiling market intelligence
    - Systematizing contact and follow-ups with physicians targets
    - Investigating service satisfaction
    - Issue monitoring/management
    - Customer service interface, etc.
- Determine the USE
    - Consider the end users and their needs/limits
    - Departmental access
    - Management access
    - Curtaining requirements
    - Reporting needs
    - Training needs/offerings

- Determine the data needs
    - Import needs
    - Data integration
    - Data sources
    - Security
- Fit
    - How does the solution and the vendor “fit” with your organization
    - Healthcare experience
    - Vendor reputation
    - Access, availability and flexibility
    - Cost

Outline your needs – essentially your wish list. Determine what is a “must have” versus “nice to have” or a “luxury.” Then investigate the various options, narrow down the field and intensely scrutinize the finalists to make your best choice.

Putting the Steps Together
Determining your overall relationship strategy is your first step. Decide how technology can help make your work processes more effective and efficient. Think through the potential conflicts and barriers, understand your program choices and then move toward assessing your overall options with a CRM tool. If you need help along the way, consider obtaining advice from a firm that knows healthcare and understands CRM.

About Forté Partners, LLC
Forté Partners, LLC is a new firm with established partners. Each project leader has over twenty years experience. The firm works with clients to create effective healthcare business development. Combining physician strategies and marketing innovation, Forté Partners, LLC collaborates with the client to find the best pathway toward success that fits within the client's needs.

The firm is headquartered in Williamstown, Massachusetts. Additional information can be obtained by visiting the firm's website at: www.fortepartnersllc.com