



THE COMPREHENSIVE GUIDE

to Better Patient Communication and Engagement

RELATIENT

Today's providers are stuck in an operational pinch point: wedged between increasing consumer expectations around ideal patient experience and decreasing staff availability to manage the

demand for immediate, personalized communication, as well as the day-to-day delivery of care. These staffing shortages are predicted to last for years to come, and providers scrambling to do more with less as they operate through staff burnout and turnover.

With a recent Salesforce report finding that 64% of consumers "under the age of 65 believe that providers with better online capabilities are more likely to

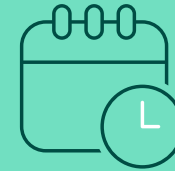
deliver better service," finding a way to navigate an evolving healthcare landscape with new digital tools is becoming a core business priority.

Forward-thinking providers are optimizing the consumer experience by balancing their resources and operational efficiency with intelligent patient communication and engagement technology. Provider groups of all sizes can tap into healthcare communication solutions to streamline operations and enhance the patient experience. This guide provides an in-depth look at the three main types of communication:

- 1. Appointment-Related Communication**
- 2. Broadcast Communication**
- 3. Targeted Communication**

64%

of consumers under the age of 65 believe that providers with better online capabilities are more likely to deliver better service



Appointment-Related Communication



Broadcast Communication



Targeted Communication

Optimizing Communications to Align Patient, Provider, and Administrator Expectations

A happy patient—or consumer—is likely to tell their friends and family about their experience, but an unhappy patient—or consumer—is likely to tell everyone. However, the perspective of an experience is entirely based on personal expectations shaped from other daily activities, such as ordering food or booking a flight. And as consumerism in healthcare increases, it's no surprise that the expectation and demand for what it means to be high quality is also increasing.

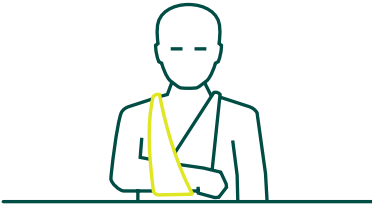
As with perceptions, the definition of quality interactions—and expectation of quality—depends on the participant in the care interaction. Patients, providers, and administrators each hold a different perspective of how care is accessed, delivered, and followed-up on for a positive patient experience.

An area of focus for health systems moving into 2023 will be how to balance operations with each group's evolving expectations of a quality experience.



How do patients, providers, and administrators define quality in a care journey?

Navigating and balancing increasing expectations for a positive patient experience



Patients want to have convenience in their options to schedule, cancel, or rebook without playing phone tag.

1. Quality is about logistics:

- Digital options for managing care, without passwords or unnecessary steps
- Getting seen in an office quickly
- No phone tag with the front desk
- Short waits to speak with staff
- Easy access to care before, during, and after appointments



Administrators want to find a balance between patients and providers to provide both groups with the operational support they require.

2. Quality is about operational excellence:

- Reducing call volume
- Bringing new patients in the door
- Educating and updating patients easily
- Training and retaining staff
- Filling last minute appointment slots



Providers want smooth operations for their day-to-day schedules, from seeing patients with a certain cadence, condition, or care goal.

3. Quality is about capacity management and efficiency:

- Specific patient appointment types during certain time blocks
- Durations that match the time they need to deliver care
- Optimized and balanced schedules without overbooking or gaps
- Correct patients according to preferences

Balancing these expectations is possible when health systems optimize three types of patient communication and engagement: **appointment-related, targeted, and broadcast-style messaging.**

Appointment-Related Communication

The most common type of patient communication is one that is currently in use by many providers: texts, emails, and automated or human calls to remind a patient they are scheduled for an appointment. According to a recent Medical Management Group Association (MGMA) survey, three of every four providers are already texting patients to remind and confirm appointments.

While this type of communication is being used for informative purposes, only 64% of providers provide patients with a method or direction for next steps, such as a phone number to call if the appointment time no longer works. Without an automation to enable a patient to directly reschedule themselves online, the message itself becomes a factor that drives up call volume, schedule gaps, no shows, call abandonment, and wait times to both speak to a staff member and see a physician. In fact, 73% of patients are still calling in to cancel or reschedule their appointments with the front desk.

Around half of providers still use human calls to confirm and remind patients of upcoming appointments.

52%

do a pre-appointment **confirmation** via human call

48%

do a pre-appointment **reminder** via human call



Providers who utilize this communication method can take their strategy forward by optimizing the messaging cadence and expanding actions that can be taken via appointment reminders, such as cancelling or rescheduling.

5-3-1 day prior cadence

The MGMA survey found that 55% of providers have no-show rates over 6%, although this may vary by type of appointment and location, whether it's a follow-up, first appointment, or new or existing patient.

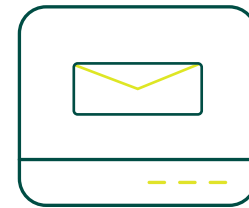
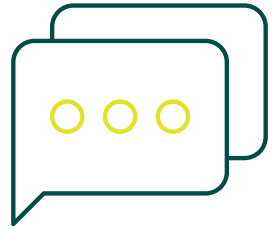
A common strategy to reduce these costly gaps in the schedule is to use a 5-3-1 communication method to space out reminders and give patients ample time to confirm, reschedule, or cancel. This may be a text five days prior to an appointment, an email three days prior, and then a phone call one day prior. By changing the time and modality, patients are more likely to receive the message and respond accordingly.

Providers who optimize their appointment-related communication report a lower no-show rate. By changing the frequency, messaging channel, and what actions can be taken via appointment-related communication, providers can begin to balance operational demand on staff with ease of scheduling.

Enable effective appointment-related communication

1. Know your patients' communication preferences
2. Give patients an easy way to access or respond accordingly (Chat, 2-way texting, etc.)
3. Consider offering 24/7 online scheduling options for cancellations or rescheduling

5 days prior to an appointment send text



3 days prior to an appointment send email

1 day prior to an appointment phone call



Including an option to reschedule in each can lower no-show rates

Broadcast Communication

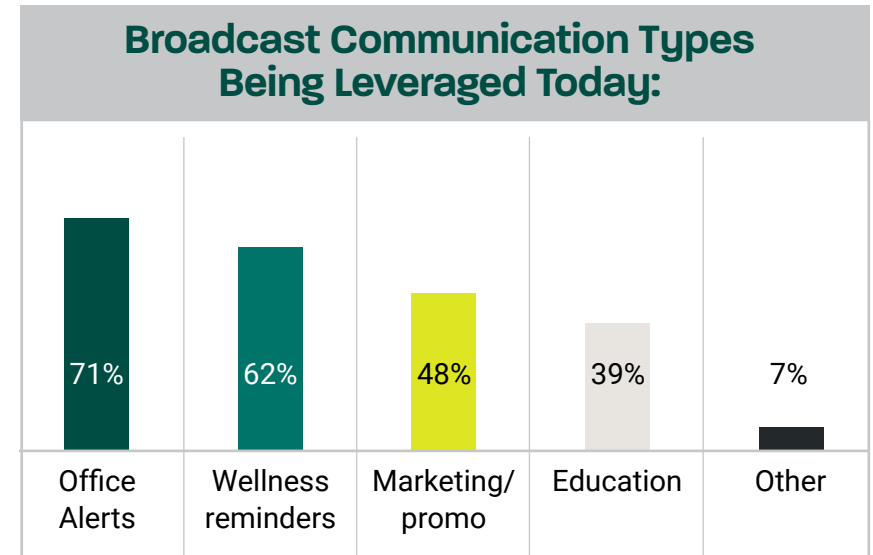
Approximately 60% of the provider groups surveyed already send mass communication messaging, also known as broadcast messaging. Broadcast messages are used to communicate large changes that impact patients equally, such as an office closure, or wellness reminders, such as flu shots being in stock for the season.

These are the most effective messages for sending multiple patient populations information around a common need or interest. When a snowstorm closes the clinic, or a provider is out sick, a quick message to all patients saves innumerable hours and redirects resource time, as compared to individually calling to inform everyone on the schedule. From a business operations standpoint, sending a mass message would take one person approximately five minutes to complete, and then they'd be able quickly pivot to a more critical task.

These messages can also be used to make patients aware of new lines of service or new treatments. For example, a new specialist could be added to the provider roster and drastically expand a specific type of care and appointment availability, such a knee or hip doctor at an orthopedics practice.

Best practices for broadcast messaging

1. Evaluate your current communication strategy including the frequency and delivery method
2. Consider the staff input and resources required to keep patients informed on organizational updates
3. If utilizing broadcast messaging technology, ensure the right templates and tools are in place to effectively utilize digital communication



Source: MGMA/Relatient 2022 Study: 2022 Patient Engagement Report

Targeted Communication

Perhaps the most effective communication method—and best for engagement—is targeted communication. These are specific, tailored messages that are wrapped into a larger campaign—also known as health campaigns—meant to drive a defined segment of the patient population to action.

These segments could target patients behind on routine preventative care, those who need chronic disease management, those who haven't been seen in too long and risk care gaps, or those who are due for a specific medical intervention. This method can also help retain patients by keeping consistent touchpoints with personalized care

recommendations. Though a patient may not be ready to schedule, they'll know what they're due for and how to get in contact when ready.

As opposed to a broadcast message, this type of engagement more closely aligns to traditional marketing strategies. The targeted communications must find, identify, and nurture defined patient cohorts until they close the deal—by scheduling the necessary care. It also sends support messages that help patients show up and be ready for their appointments, and then follow-up education to continue engaging and educating the patient for better health outcomes.

Considerations to target and activate patients:

1. Build an effective strategy and delivery based on your objectives
2. Use a data-driven understanding of patients for better targeting and digital outreach
3. Combine digital outreach (communication) with digital acquisition (scheduling)



Seven Hills Women's Health Center uses patient data to drive up preventative screening rate

One health campaign closes screening gap for 1,300 patients

New guidance for pap smears were misinterpreted by patients and many women began skipping their annual exams. However, the annual exam is thought to be only a pap smear, when is a combined breast and cervical exam that are important to detect other types of cancers.

Seven Hills Women's Health Center leveraged their patient data to create specific health campaigns to recapture these patients:

CAMPAIGN CRITERIA:

- ✓ Segment patient population based on date of last visit and demographic data
- ✓ Segment based on last communication sent
- ✓ Build multi-channel communication messages around "Not Seen In Three" health campaign theme
- ✓ Enable proactive patient self-scheduling link within each message
- ✓ Send messages to defined patient audience based on communication preferences and set cadence

CAMPAIGN RESULTS:

1,370

new appointments were scheduled

234

required more than one visit

27

required surgery

Quality, outcomes, and experience are three metrics that will become increasingly important in 2023, especially for those organizations with a focus on value-based care. However, staffing shortages and doing more with less will still be a main priority for most provider groups.

Optimizing patient communication and engagement technology to manage outreach activities—such as appointment management and health condition education—can streamline operations and balance provider utilization, retain patients, and improve health outcomes.

The more connected providers are to their patients, the fewer hurdles both will face in moving patients through each individual's journey to wellness. It takes a strategic combination of all three types of messaging to establish and maintain a positive, trusting relationship between patients and providers.

An intelligent patient engagement solution can support a continuous patient journey with targeted, omni-channel communications. Using a solution with integrated data mapping allows for the timely delivery of messages to patients and providers with the modality that matches their current preferences and habits. This flexibility ensures effective communication from the time an appointment is scheduled all the way through post-care follow-up.

[Learn more about patient engagement with Dash Engage.](#)

Considerations for implementing communication technology

1. Will the technology integrate into core practice management and EHR systems?
2. What are the business objectives—retaining patients, improving chronic condition management, bringing new patients in the door?
3. How will the campaigns be delivered?
4. What types of data can be used to strategically engage patients?

About Relatient®

Relatient, Inc., is a leading patient scheduling and engagement technology company that utilizes a intelligent mobile-first approach to improving access to care. Integrating with all leading EHR/PM systems, Relatient engages with over 50 million unique patients per year on behalf of provider groups and health systems across the U.S. Relatient's self-scheduling, patient messaging, chat, digital registration and payment solutions drive operational efficiency, increased appointments, reduced no-shows, faster patient payments and improved patient satisfaction, all while supporting better health and care quality initiatives.

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