

A health plan is leveraging Salesforce components to drive accelerated member experiences and deeper member engagement by creating an omni-channel, multi-stakeholder payer ecosystem.

Creating an Engagement Architecture While Driving Member Experience Journeys

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Introduction

As a New York State health plan headquartered in Albany, Capital District Physicians' Health Plan (CDPHP) is on a path to drive every member interaction through a common platform. CDPHP is using Salesforce to transform the entire member-focused enterprise digitally. From basic member services to marketing, pharmacy, and managing personalized care programs, Salesforce is the trusted member experience and engagement platform at CDPHP.

The vendor is now showing its depth at CDPHP by rounding out its capabilities and evolving an engagement architecture that takes member experience transactional efficiencies and layers on member engagement, measured by effectiveness. CDPHP has used Salesforce since 2005. After 10 years of using this software in a "business" capacity, it committed to Salesforce in the cloud in 2015 for identity management, rating engines, and nonmember portals. In 2017, the organization engaged a systems integrator and deployed Salesforce Health Cloud with an enterprise vision of supplementing its core administration engine by building a true customer relationship management (CRM) engagement platform.

Health Cloud is a healthcare CRM that brings together clinical and nonclinical data into a single source of truth to help organizations elevate the health experience and deliver trusted interactions with a 360-degree view of members, patients, and providers. Health Cloud's purpose-built apps enable real-time consumer engagement, automated business processes, and coordinated care management from anywhere. For CDPHP, Health Cloud provides an enriched view of the member journey. In addition, the ease of configurability enabled CDPHP to rapidly implement care management programs and utilization management.

SOLUTION SNAPSHOT

ORGANIZATION:

CDPHP is a not-for-profit, physician-founded and guided health plan with nearly 400,000 members and 825,000 providers. It is based in Albany, New York.

ORGANIZATIONAL CHALLENGES:

- » CDPHP needed a connected system for health and marketing data to personalize campaigns.
- » Service reps needed insight into every communication members were receiving.

SOLUTION:

CDPHP relies on the Salesforce Health Cloud platform to bring together its health data, marketing efforts, member experiences, and customer engagement in one place.

BUSINESS BENEFITS:

- » Increased visibility into how member campaigns are performing; clearer marketing insight as to what collateral members are receiving
- » Increased trust and transparency with Medicare brokers; accessing new functionality through the household view as a game-changer for agents

Implementation

CDPHP wanted to build a connected system for health and marketing data to personalize its member interactions and connect 12 of its business areas. CDPHP sought to improve member engagement (meaning loyalty to care plans, wellness plans, and a member's "feeling" about the company) as well as the transactional nature of the member experience. "Except for claims adjudication, almost every other aspect of Payer is CRM," said Samuel Miller, CDPHP Vice President, Technology and Product Development. Salesforce worked with CDPHP to help enhance the organization's member engagement strategy in the following ways:

- » **360-degree member views.** The CDPHP strategy affects all its constituents, including members, employees, providers, employers, and brokers. Having Salesforce's holistic view means bringing together member interactions, collaborations with outside parties on behalf of members, clinical data, administrative data, social determinants, and anything else they know about the member – all in one place. Miller added, "Health Cloud gives us a secure, reliable way to engage our constituents in the healthcare ecosystem and bring our digital transformation vision to life."
- » **Multichannel marketing.** CDPHP wanted to engage digitally with its members in a more personalized manner. It also sought to improve tracking around its marketing efforts for new programs and offers. CDPHP upgraded to Salesforce Marketing Cloud 2.0, enabling the company to engage with members more effectively in personalized ways across digital channels. By integrating marketing with healthcare CRM data, CDPHP has accurate, real-time insight into personalized journeys. "The great thing about Salesforce as a platform is we don't need individual middleware or back-end products to engage across email, mobile, text, and social," said Miller. "We can achieve this within our Salesforce ecosystem."
- » **Care management.** The CDPHP care management application feeds into Health Cloud so that its inpatient nursing staff can help with transitions of care and filling care gaps. The company's care management programming includes high-risk health management services, inpatient care coordination and concurrent review, prior authorization, member appeal and complaint resolution, and chronic condition support. CDPHP assesses, plans, implements, coordinates, monitors, and evaluates the options and services required to meet a member's health needs. Health Cloud supports easier and more straightforward clinical data integration from other CDPHP source systems.
- » **Utilization management.** To ensure that value-based care is available to all members across the full continuum of care, CDPHP integrated Health Cloud with an existing evidence-based clinical support solution. CDPHP operates under a fully integrated and cohesive population health management (PHM) model, accomplished through planning, coordinating, monitoring, and managing healthcare services to ensure appropriate, cost-effective care while contributing to the overall goal of member wellness. This strategy allows for continued focus on improving quality of care and healthcare outcomes for CDPHP members.

Benefits

CDPHP began by launching its Medicare client manager and pharmacy care manager. In addition, CDPHP rolled out its largest call center in 2019, which has been very well received by members. The CDPHP engagement architecture enabled by Salesforce now allows the organization to achieve benefits in the following areas:

- » **Member Services.** Accessing new functionality through the household view is a game-changer for agents, allowing them to see eligible or enrolled members within the same family (e.g., a mother and multiple children) and compliantly view dependents' claims information in one view without having to search for each individual. Service agents are also compliantly receiving the information and knowledge they need to stay up to date through Chatter, a Salesforce real-time collaboration application that lets users share information and collaborate in real time. They can also view records of actual conversations instead of sifting through email to find answers. Last, via centralized knowledge management, customer service agents can be more "in the know" than ever with accurate and consistent data they can convey to constituents when they call. Members can also enjoy an average speed-to-answer rate of just 10 seconds, according to CDPHP.

Also, in Member Services, real-time bidirectional synchronization with the existing core claims administrative solution ensures speedier access to member data by customer service representatives.

- » **Medicare Sales & Pharmacy Management.** The CDPHP Medicare Client Manager provides a CRM prospect conversion process to collaborate with Medicare brokers in their region to convert people who are aging into or shopping for a plan. The team can now enjoy digital collaboration and increased clinical transparency with brokers, while being able to track and manage pharmaceutical interactions for the first time.
- » **Constituent Self-Service.** Now, members do not always have to call in to get the answers they need. By taking the knowledge articles that CDPHP manages and making them accessible to external constituents enabled by member journeys on Salesforce Experience Cloud, the organization can help members get answers faster with a more seamless experience while freeing up communication channels.

Member satisfaction metrics also help to underscore the success of the Salesforce solution. CDPHP was once again named number 1 in Customer Satisfaction among New York Region Commercial Health Plans in the J.D. Power 2021 *U.S. Commercial Member Health Plan Study*. The J.D. Power study measures member satisfaction among 150 health plans in 22 regions throughout the United States and provides customers with a comprehensive, in-depth understanding of how their health plan stacks up against its competitors.

The Centers for Medicare & Medicaid Services (CMS) has ranked both CDPHP's Medicare PPO plan and Medicare HMO plan with five out of five-star ratings, among the highest in New York State and the nation. The Better Business Bureau (BBB) rated CDPHP with the highest distinction. In addition, the latest CDPHP Net Promoter Score (NPS) surpasses that of its industry competitors as well as Disney, Amazon, Apple, and Target.

Having Salesforce enabled CDPHP to quickly pivot into remote work at the onset of COVID-19 "without a hiccup" in its operations. Now, CDPHP continues to improve member outcomes by expanding its care management offerings with Hospital to Home and Transitions of Care programs. Using Health Cloud, CDPHP has streamlined post-discharge communications to reduce the incidence of medication errors, unnecessary or duplicate testing, increased emergency room visits, and readmissions to the hospital. Members can also be connected with community resources like behavioral health services to ease their recovery and provide continuity of care.

Challenges

There is always a learning curve when implementing change. Integrating the CDPHP core claims administration with Salesforce bidirectionally took some time, as expected. End users also had to adjust to the new technology and its process for viewing member interactions. However, buy-in grew as legacy applications were retired and the benefits of Health Cloud came into focus for the company.

Best Practices

Salesforce is one of the enterprise platforms at CDPHP, with a strong footprint around customer and member engagement. To ensure internal ownership and a professional and continuous evolution of the Salesforce ecosystem, CDPHP established the Salesforce Center of Excellence (CoE) with an internal team of Salesforce professionals acting as a delivery and architectural governance backbone supported by strategic system implementation partners.

CDPHP also recommends having a strong internal team that really understands Salesforce and can provide guidance and consulting expertise to help design processes that optimally leverage the capabilities of the solution. The fact that CDPHP had such a team that could oversee and guide systems integrators and ensure that standards were met was an asset.

Methodology

The project and company information contained in this document was obtained from multiple sources, including information supplied by Salesforce, and questions posed by IDC directly to the CDPHP Vice President Technology and Product Development Samuel Miller.

About the Analyst



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Jeff Rivkin, M. Sc, CHRS, PAHM, CPEHR, CBIP, CCP, CDP, has been the Research Director of Payer IT Strategies for IDC Health Insights for over six years. In that role, he is responsible for research coverage on payer business and technology priorities, constituent and consumer engagement strategies, technology and business implications for front-, middle-, and back-office functions, value-based reimbursement, risk, and quality-based payment and incentive programs, among other trends and technologies important to the payer community.

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