

The Reputation Revolution:

Why Long Term-Care Organizations must embrace transparency

Introductions



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The Reputation Revolution:

Why Long-Term Care Organizations must embrace transparency

Today's Game Plan

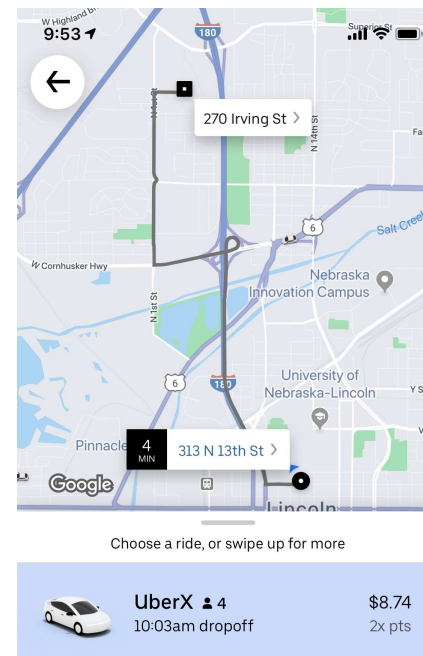
- A Consumer State of Mind
- The Virtual Customer
- Health Care Consumers
- Consumer-Centric tomorrow



What do consumers want

Convenience
Personalization
Improvement
Outcomes

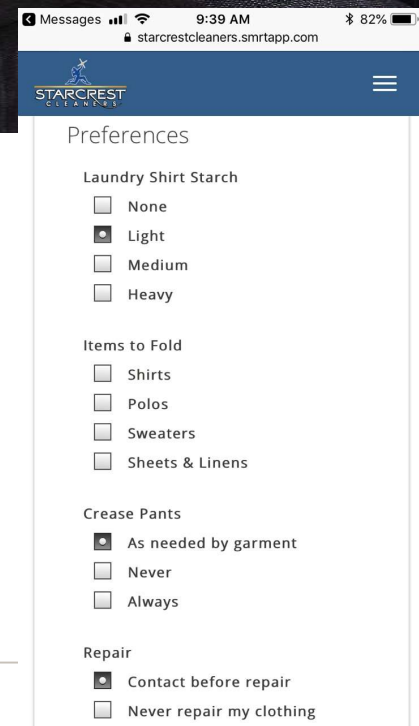
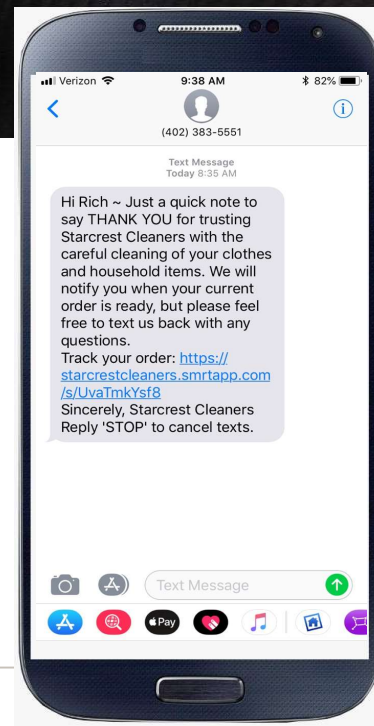
Convenience is King





Personalization

Who knew dry cleaning could be so personal?



Improvement



1998: Worlds first
online DVD rental
store



2004:
Unlimited rentals
with One-Day
Delivery



2016:
Downloads
available for
offline viewing

1999: Adoption of
the subscription
model

2007:
Streaming
Concept
introduced

2018:
Skip the
introduction



Outcomes



Sun Mountain Clubglider Journey Wheeled Travel Covers

★★★★★ ~ 28

\$249⁹⁹

✓prime FREE Delivery Wed, Sep 11

More Buying Choices

\$211.02 (14 used & new offers)



Titleist Golf Club Travel Cover by ClubGlove

★★★★☆ ~ 10

\$329⁹⁵

Or \$65.99/month for 5 months

✓prime FREE Delivery Wed, Sep 11



CaddyDaddy Golf Constrictor 2 Travel Cover

★★★★☆ ~ 973

\$84⁹⁹

✓prime FREE Delivery Wed, Sep 11

More Buying Choices

\$79.04 (8 used & new offers)



Plano Golf Guard DLX Golf Guard (Black)

★★★★☆ ~ 68

\$79⁷⁰

FREE Delivery for Prime members

The case of the virtual customer

Increasing Consumer digital behavior

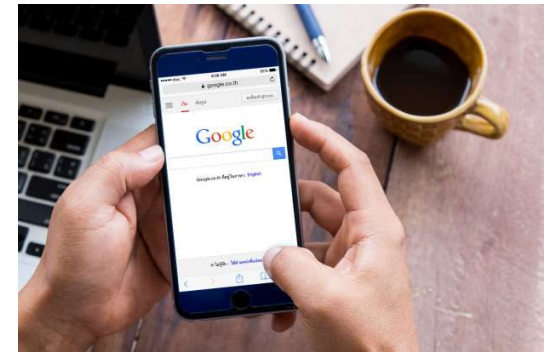
Consumers open a virtual door long before opening a physical door!

Consumer shifts in digital behavior

- **87 percent** use the internet regularly
- **92 percent** use ratings/reviews before buying *2015: 73 percent*
- **74 percent** use social media (average age 45)
- **52 percent** *of internet usage is mobile 2015: 35 percent*
- **3 hrs. 35 min** *average mobile internet usage per day*

Consumers Use Search to Optimize Their Lives

1. It helps consumers get excited
2. It helps consumers feel more confident
3. It helps consumers create the best experience



The Evolution of Digital Healthcare Information

Consumer shifts in digital behavior

- **35 percent** own a wearable *2015: 17 percent*
- **15 percent** used telehealth last year *2015: 11 percent*
 - **35% used telehealth (Q3 2020)**
- **57 percent** would schedule tele-visit *2015: 36 percent*
- **35 percent** of consumers are likely or very likely to prefer a healthcare provider following a website visit

We now live in a
consumer driven
healthcare economy



Consumer expectations of healthcare have changed

PERSONALIZATION

IMPROVEMENT

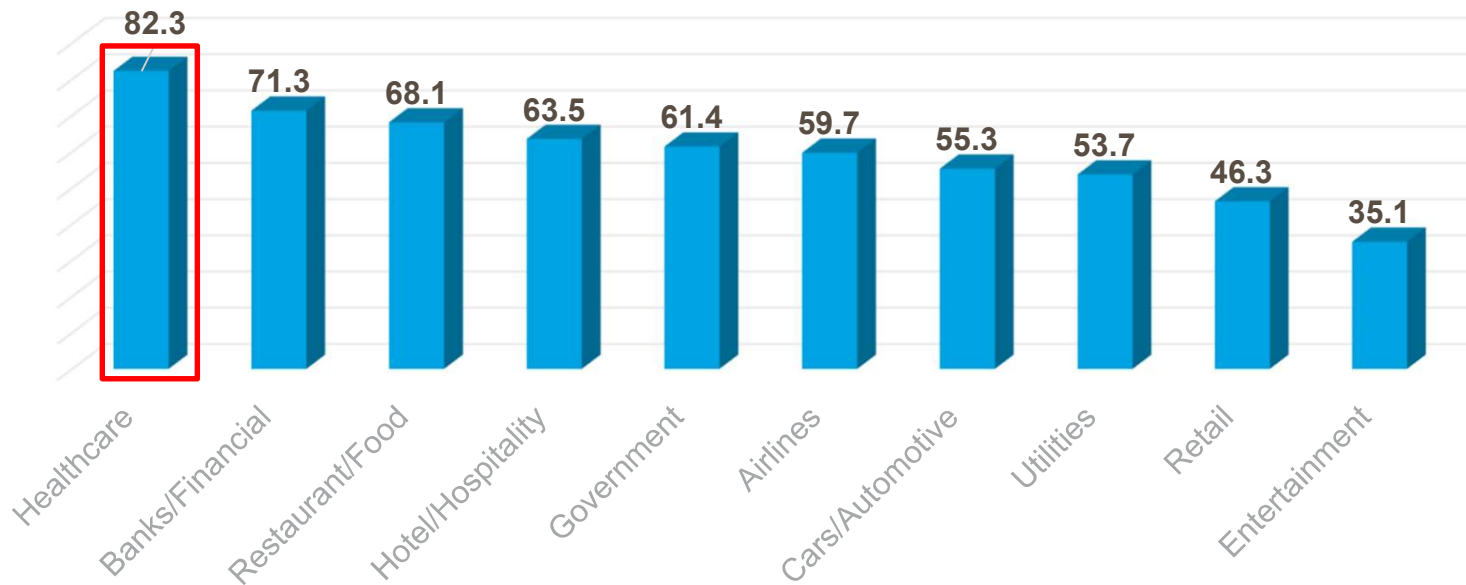
OUTCOMES

CONVENIENCE



Ever-climbing expectations for healthcare

Which of the following industries *should* consistently meet or exceed your expectations as a customer?





92%

of consumers begin their
healthcare search online

2019 Healthcare Consumer Trends Survey

Does your online presence represent reality?

 6000

The number of online searches related to long term care communities made **EVERY HOUR**



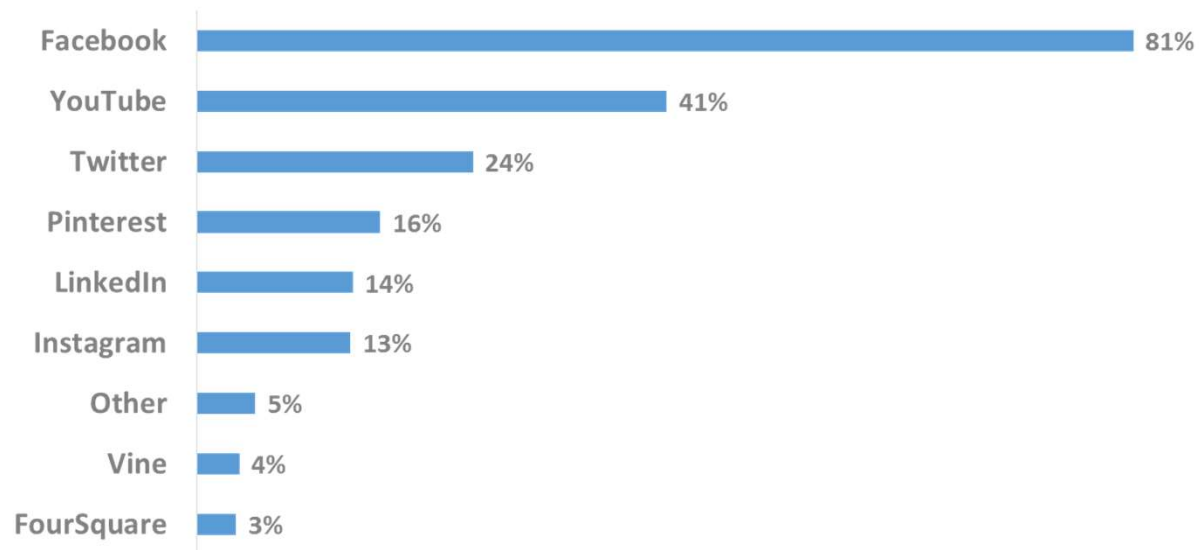
Social Media Driving Online Patterns

Use of social media strongly prevalent

- **74%** of online consumers use social media websites
- Average age of user is **45** years old
- **49%** among 65+
- **1 in 5** interacted w/ local healthcare provider

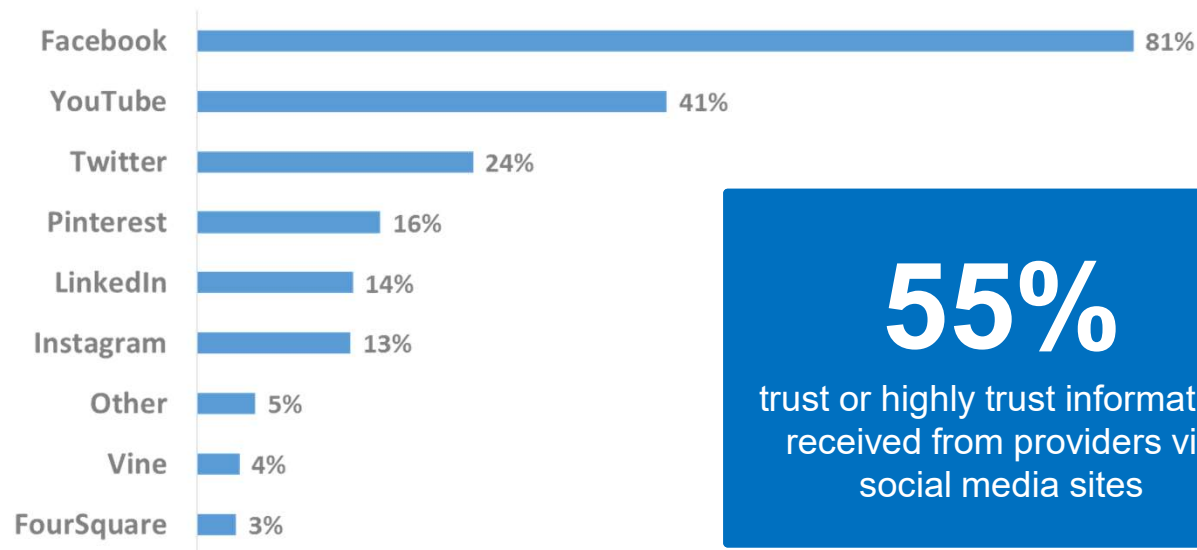
Popular Social Media Sites for Healthcare

What form of social media do you use
as a source of health information?



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55%

trust or highly trust information
received from providers via
social media sites



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Online vs. Word of Mouth

23 percent of consumers do not trust online reviews as much as personal recommendations

77 percent of consumers do trust online reviews based on the following criteria:

→ I can read **multiple** customer reviews

→ I believe the reviews are **authentic**

Where are your customers talking about you today?

- 21% of consumers have already rated or reviewed a healthcare provider online
- 44% feel viewing ratings/reviews online is their first step in seeking care



A Word About Negative Reviews

We have an irrational view of the **negative** rating:

- **12%** of consumers left a negative rating or review for a healthcare provider
- **51%** of consumers received a response from the healthcare provider or parent organization
- **58%** of consumers removed their negative rating or review

Importance of online ratings and review when selecting a Long Term Care Facility



Poll Question: Percent of consumers that have trust and confidence in Long Term Care?

→ 24%

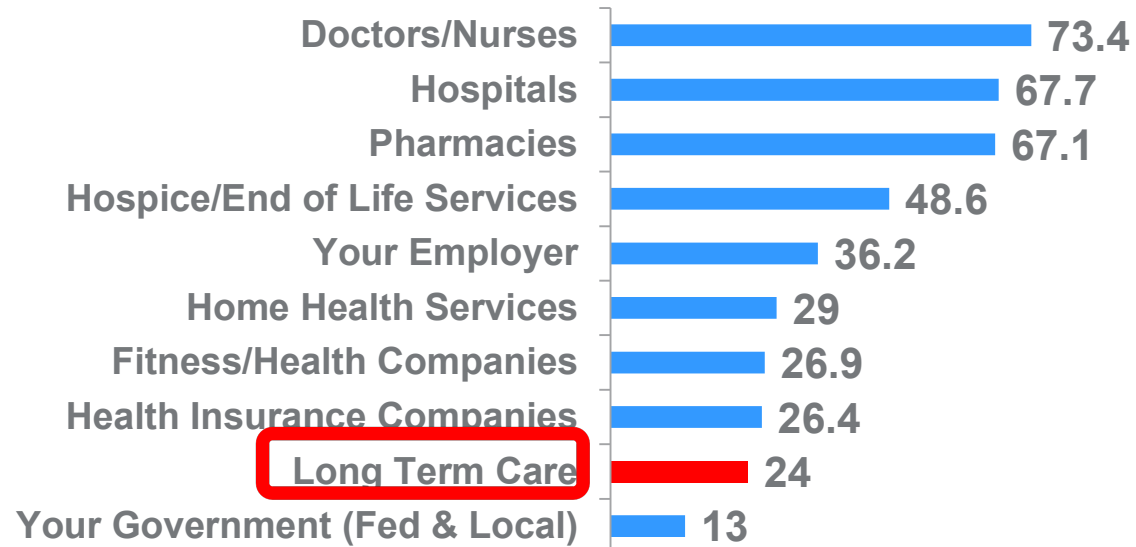
→ 37%

→ 52%

→ 15%

Who Do Consumers Trust?

How would you rate your overall trust and confidence in the following:



Does your online presence represent reality?

 6000

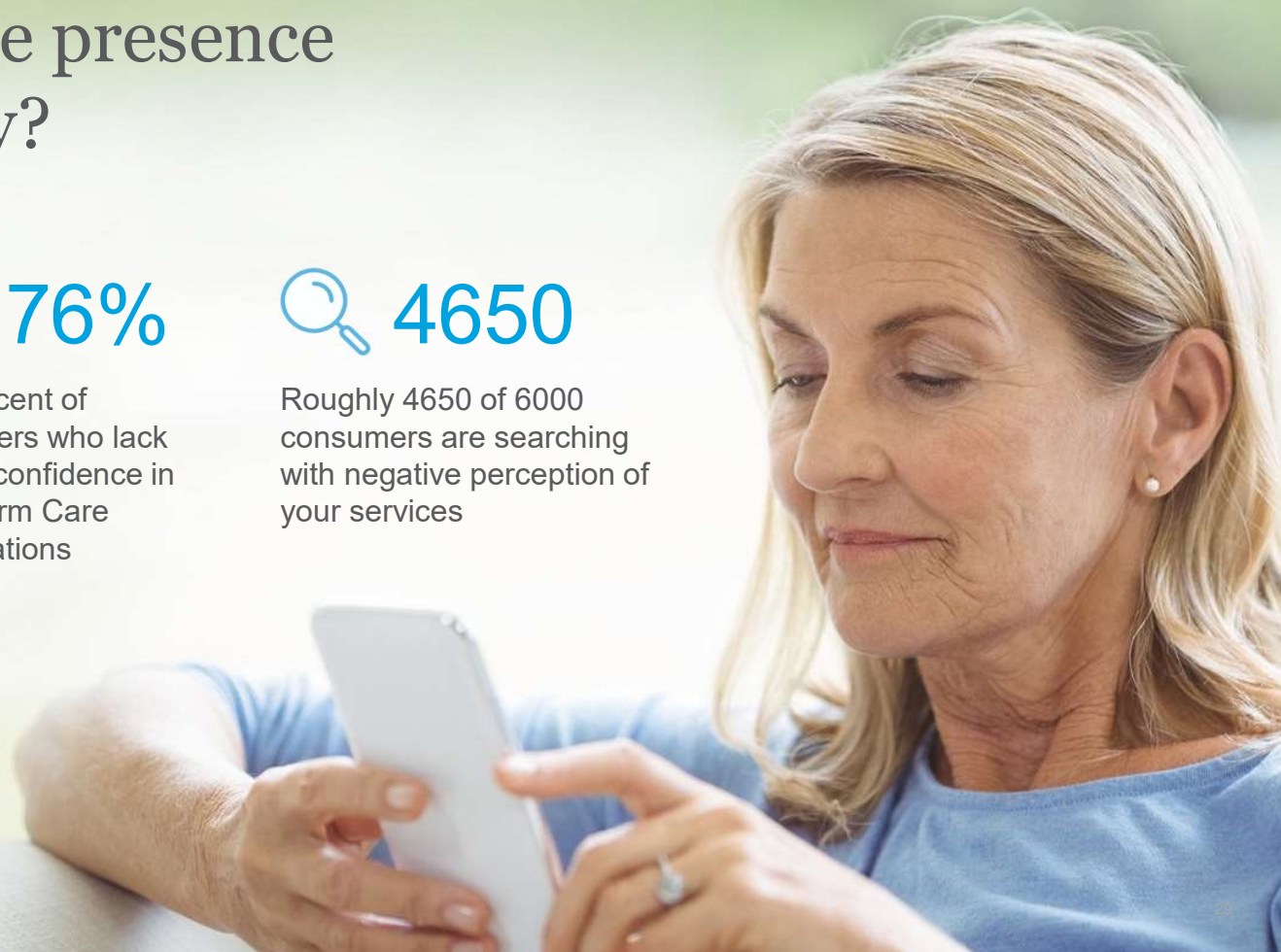
The number of online searches related to senior living communities made **EVERY HOUR**

 76%

The percent of consumers who lack trust or confidence in Long Term Care organizations

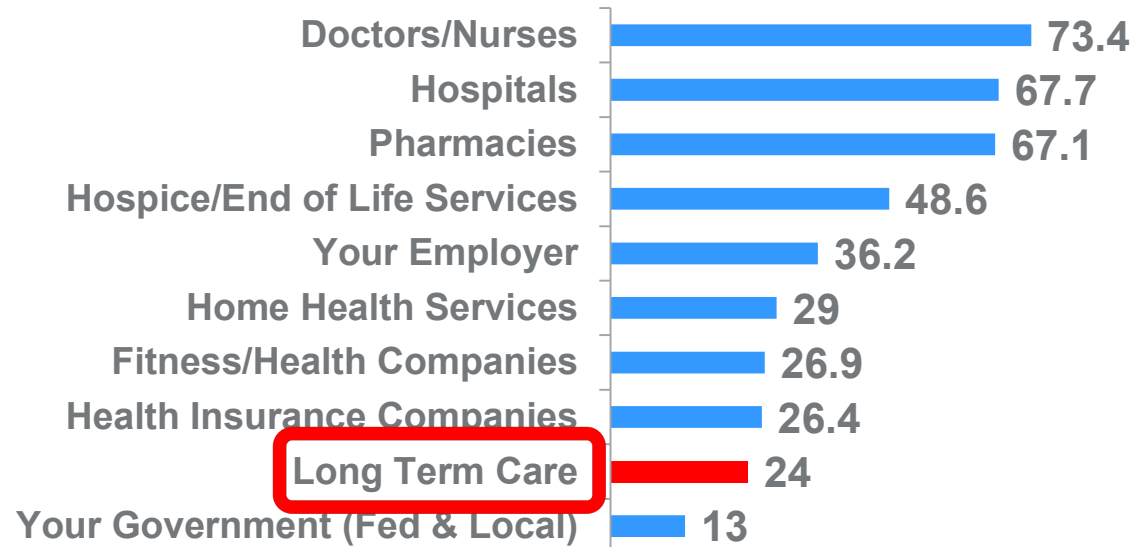
 4650

Roughly 4650 of 6000 consumers are searching with negative perception of your services



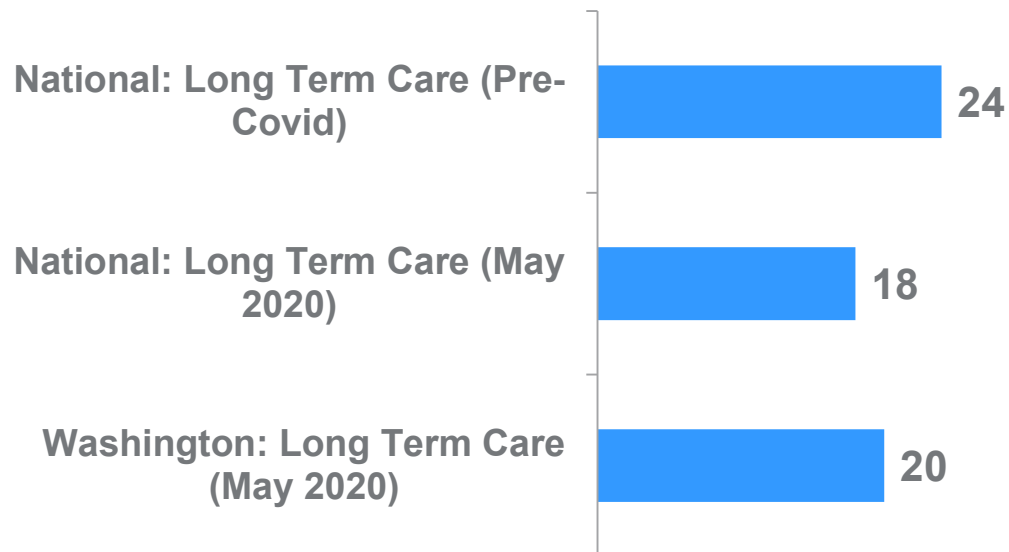
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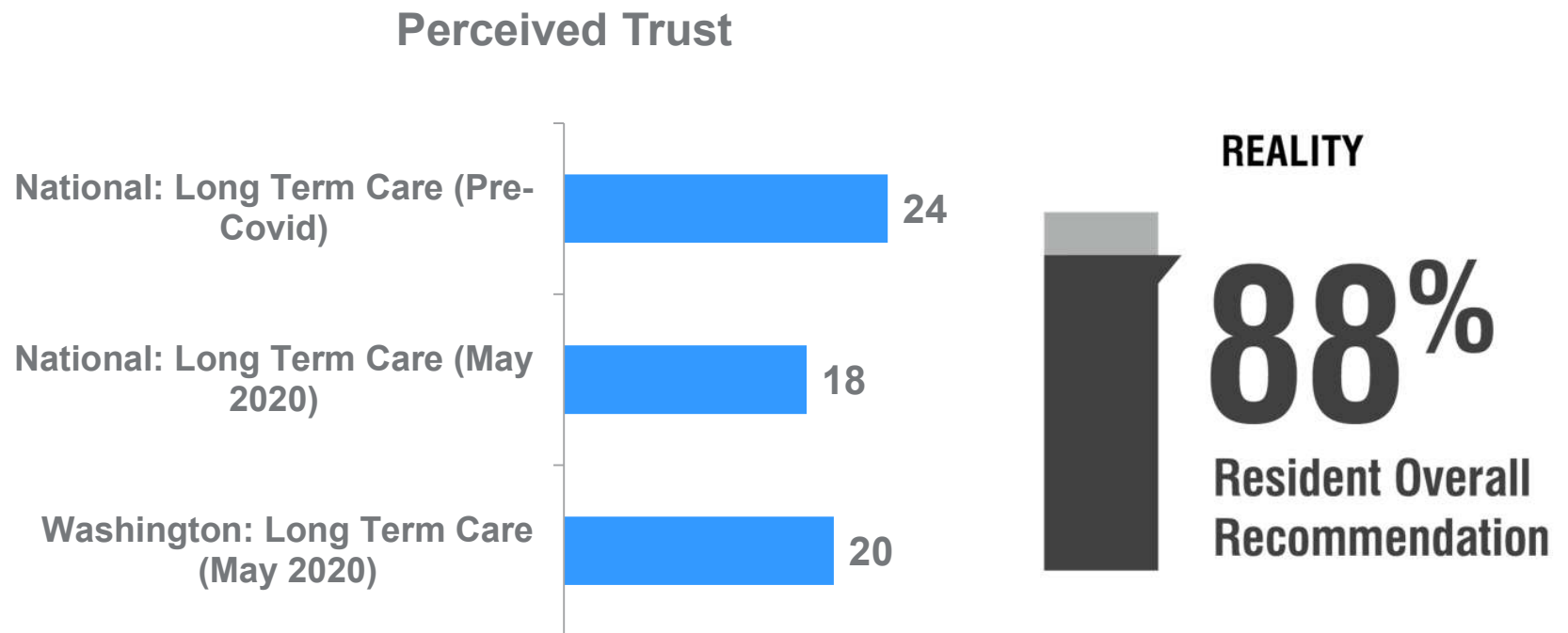


How has Covid-19 Impacted Trust?

How would you rate your overall trust and confidence in the following:



Perception vs Reality



We need to think differently



We live in a world where everyone is obsessed
Customer Satisfaction!



It's all about the Customer Experience

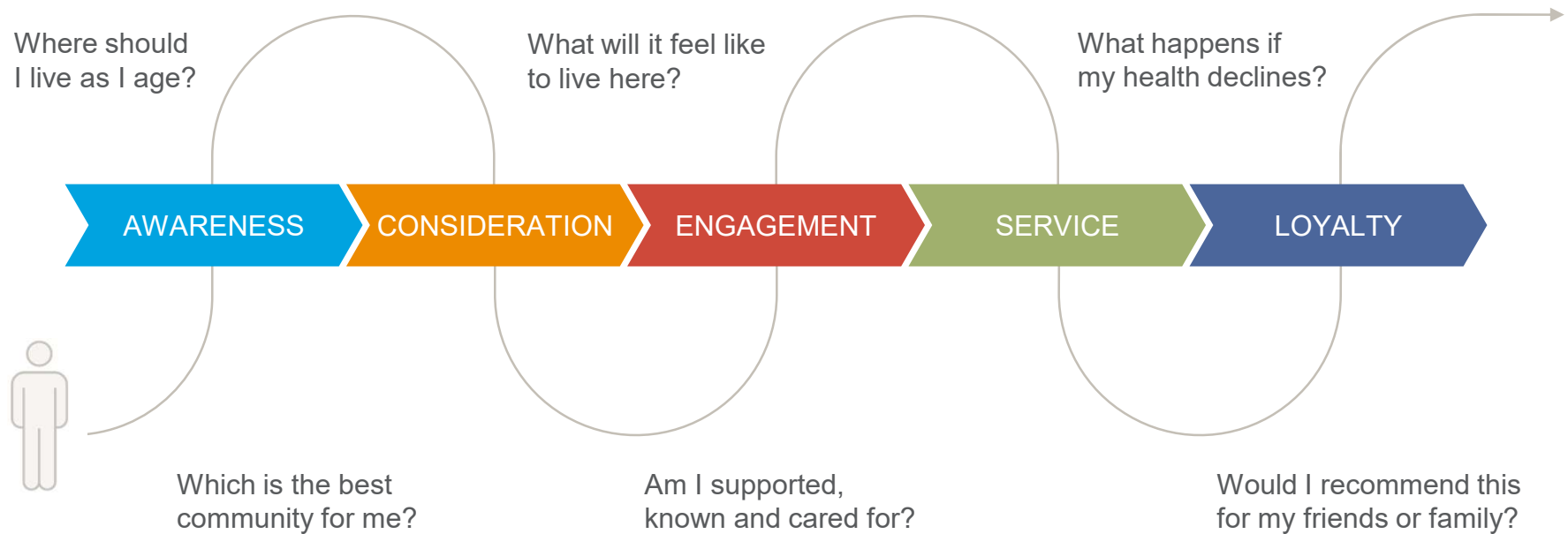
“We think of the Experience as our relationship with you from the time you visit our website or call us to when you arrive at your destination and all points in between”



Gary Kelly
CEO-Southwest Airlines

When do your customer actually
become your customers?

The Customers Journey



AWARENESS

Online Brand Strategy

The goal:

- **Website** - easy to navigate, mobile friendly (80% access the internet daily from a mobile device)
- **Social Media** – 74% of consumers use social media (Facebook #1)
- **Monitor 3rd party rating/review sites** – provides opportunity for service recovery



92%

of consumers begin their
healthcare search online

2019 Healthcare Consumer Trends Survey

Overall strategy for combating reviews online

- Respond, respond respond.
 - Work to take the conversation off line
- Find a way to monitor when reviews are left
 - Many services offer this.
 - At minimum set up a google alert.
- Encourage people to leave positive reviews on 3rd party sites



But how do I respond??



Laney Mullen

Local Guide · 32 reviews · 7 photos

★★★★★ 3 months ago

From the moment I went in for an unscheduled tour I was blown away! My mom needed a stay after being in the hospital. The physical therapy room is incredible. Residents were clean and cared for. Many were socializing and out of their rooms. The food is good and the facility itself is beautiful. We were thrilled. If there were more stars to give I would.

- How do you respond:
 - Hello Laney, We appreciate you taking the time to provide us with a review of your experience. I am pleased to hear that our team made your experience pleasant.



William Chamberlain

8 reviews

★★★★★ 10 months ago

- How do you respond:
 - Thank you for your rating! We are proud of the high quality service we provide.

But how do I respond??



Stacy Stephens

1 review

★★★★★ 7 months ago

The facility was nice and the staffs are polite, they seemed to really care about the patient.

The only problem I have seen was the nurses, They were rude to their NA's. Some nurses should be investigated. But overall it a good place for rehabilitation and recovery.



Kali Sparks

★★★★★ 7 months ago

- How do you respond:
 - Hello Stacy, allow us to take a closer look at this for you. Please contact us at rkortum@nrchealth.com with your information so we're able to best assist you. Thank you
- How do you respond:
 - Hello Kali, I'm sorry that you were disappointed with your experience. If you could let us know how we could improve, we would appreciate the opportunity to make it right. Thank you.

Use case: reputation monitoring in long term care

The goal:

- **Manage brand reputation**
within their market and drive more traffic to their website
- **Immediate Service Recovery**
by responding to negative reviews
- **Foster a culture of accountability**
within their organization and community

In the first three months:

226%

Increase in Reviews

2.4 – 3.5



20% Increase in
average Star Ratings



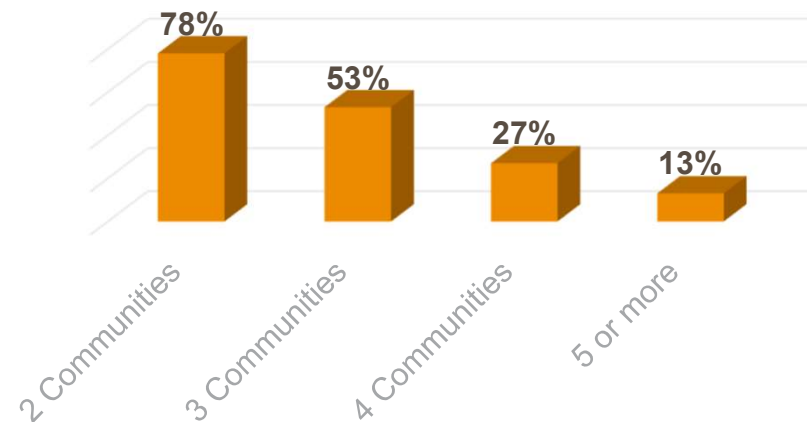
5-9%

The difference in one star average can lead to 5-9% difference in revenues

Feedback goals:

- 24-48 hr. outreach
- What's important to you
- How'd they hear about us
- Likelihood to move-in
- Immediate Service Recovery

Average Number of Assisted Living Communities Visited



Case Study: Real-Time Feedback Post Tour

The goal:

- **Gain New Residents**
through responding to tour feedback
- **Immediate Service Recovery**
by responding to tour feedback concerns
- **More Immediate Outreach**
within their organization and community

In the first three months:

\$416K

Dollars gained from
service recovery

74%

Detractor move-in rate due
to service recovery efforts

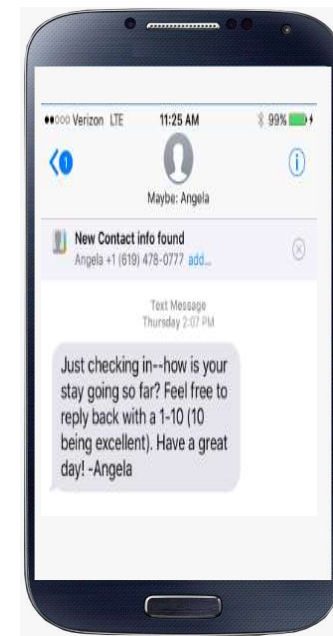
24 – 48

Hours outreach occurs

Move-In / Admission

Feedback goals:

- **How was the transition of care**
- **Reason for choosing**
- **Referral source**
- **First impressions**
- **Open ended feedback** – provides opportunity for early service recovery



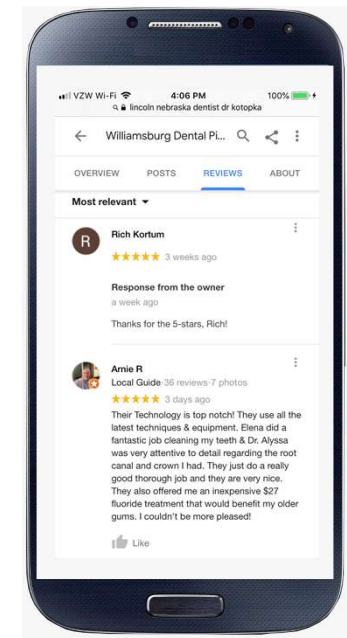
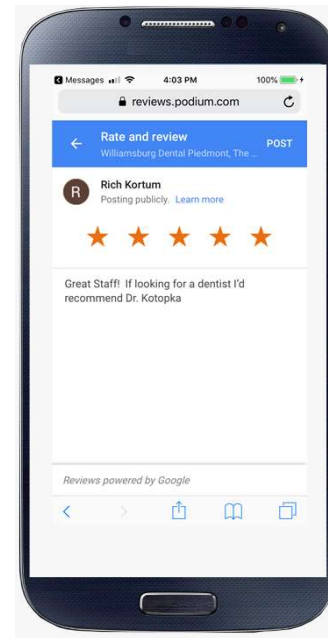
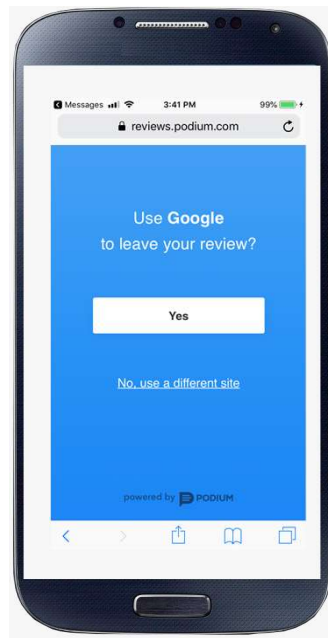
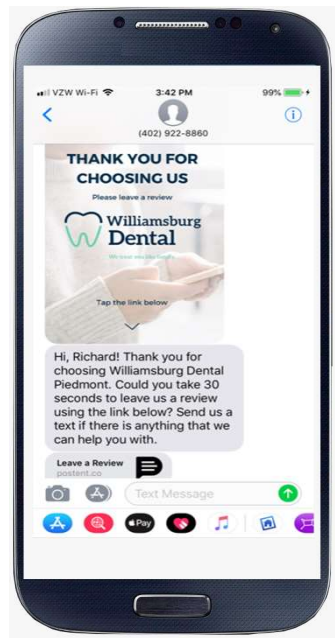
N = 1 Experience

The goal:

- **Contact 100% of your customers** – Long-Stay Resident/Family and Short-Stay Patient
- **Personalized Preferences** – Embrace Technology (Email, text, phone or mail)
- **Open ended Question**
- **Service Recovery** – Follow-up ASAP
- **Ask for 3rd party reviews**

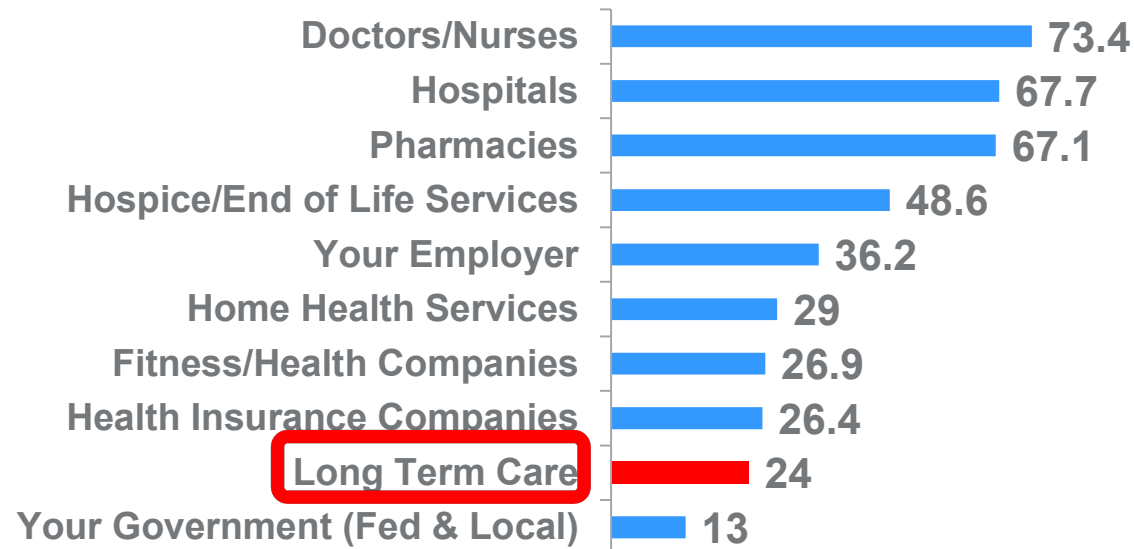


Seeking reviews from your customers



LOYALTY

Perceived Trust



REALITY

88%

Resident Overall
Recommendation

LOYALTY

Embrace Transparency

Resident/Family Ratings and Comments

Resident Rating

★★★★★

4.6 out of 5

73 Ratings

56 Comments

4.6 out of 5 (73 Ratings, 56 Comments)

★★★★★
Nov 1, 2019

Friendliness of staff including a few Knowing my mom is being watched and looked after

★★★★★
Nov 1, 2019

Wonderful dining room chair - thanks - Caring for the residents - Medical needs of residents - Wonderful dining room staff - Very caring hair dresser.

★★★★★
Nov 1, 2019

Making me feel at peace knowing that my mom is loved and getting the best possible care. At times I felt like our situation was difficult the staff made me feel like it was not. I appreciate them so much. This has been difficult and they received a lot of stress.

★★★★★
Nov 1, 2019


Follow up on my concerns. Friendly & courteous staff.

★★★★★
Nov 1, 2019

Courtesy of the staff, thanks for all that you do!!!

★★★★★
Nov 1, 2019

Staff is very courteous I like that they all acknowledge me and my family when we arrive for a visit.



4.7 out of 5.0
based on 186 reviews.

out of 53 branches

★★★★★

Aug 1, 2020

Serve better food

★★★★★

Aug 1, 2020

You are all doing such a great job! Thank you so much for all you do and the sacrifices you make to take care of our loved ones. We really appreciate all that you do for them and us.

★★★★★

Aug 1, 2020

"C. Thank you for keeping such a watchful eye over our loved ones during these difficult times.

★★★★★

Aug 1, 2020

Thank you everyone for taking such good care of my Mom!!

★★★★★

Aug 1, 2020

C. Great staff. Your process for the Porches Visit is incredible. Thank you for taking care of our mother.

★★★★★

Jul 2, 2020

I get a little upset when I go to talk to my mom through her window and the girls hand her the phone and run off.

Use case: Publishing Ratings/Reviews in Long Term Care



4.4%

Census growth



3%

Increase in satisfaction scores



826%

Percent increase in visible star ratings in Google Search



5-9%

The difference in one star average can lead to 5-9% difference in revenues

We need to think differently



Thank You!!!

Resident Feedback: 88% Recommendation

- This community did an outstanding job dealing with the Covid-19 pandemic. They kept us feeling informed, safe, and well fed. Seeing what happened at other communities with illness and deaths, I would say that this community deserves special commendation. Our Administrators have just done a super job.
- Since the exercise room became unusable for classes, it was a great idea to have exercises shown on the 900 channel. There were many different types of exercise to do, right in our apartment and was very much appreciated. Personally I do hope these exercise continue to be offered on 900 channel. We love living here. It is a beautiful home and the residents and staff are all so friendly and kind.
- The staff has been wonderful during these months of "lock down" due to the virus pandemic. Meal deliveries have been excellent!!! Cannot say enough good things about the good and patient care during these trying months

Family Feedback: 91% Recommendation

- *I'm so happy my mom is in such a caring environment. This pandemic has been a test for the level of trust I have for this facility. They continually strive to nurture the needs of their residents with their positive community spirit. My mom has appreciated the special care and attention she has received for her medical, social, and emotional needs during these difficult times. I can rest assured we made the right decision to move my mom to here.*
- *My mother was at the facility for 2-weeks and the management had to restrict visitors because of the corona virus. I was assigned a liaison and she checks in with me daily. This facility has shown excellent ability to cope with this problem.*
- During these trying times, I was EXTREMELY impressed with the precautions that this community had taken even BEFORE the coronavirus exploded into the pandemic that it has become.

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