

# Business as Unusual

*Adapting for Success*

**Brian Wynne**  
Vice President, NRC Health

**nrc**  
HEALTH

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## Discussion Roadmap

- ✓ Year in Review
  - Industry highlights
  - Defining patient and consumer trends
  - NRC Health by-the-numbers
- ✓ Adapting for Success
  - Featuring NRC Health partners
- ✓ Thriving Tomorrow, Together

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hims  
NURX.

**COSTCO** | Health Solutions  
WHOLESALE

UBER Health

WARBY PARKER

Walmart  
Health & Wellness

HAVEN

AC Wellness

THE RITZ-CARLTON  
LEADERSHIP CENTER

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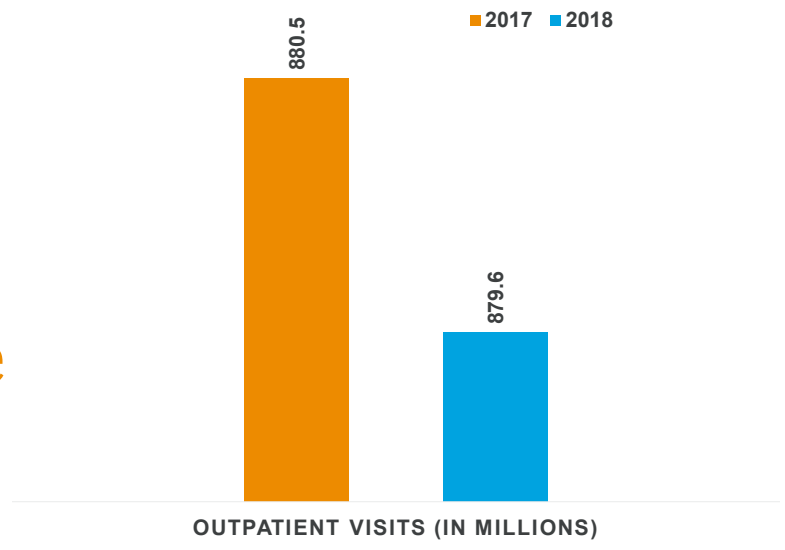
27.6% of patients have deferred a necessary care treatment—up from 22.1% in 2018

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# Outpatient Volume on the Decline



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**United States**

Coronavirus Cases:  
**5,380,437**

Deaths:  
**169,546**

**AHA Projects \$323B in COVID-19 Hospital Financial Losses in 2020**

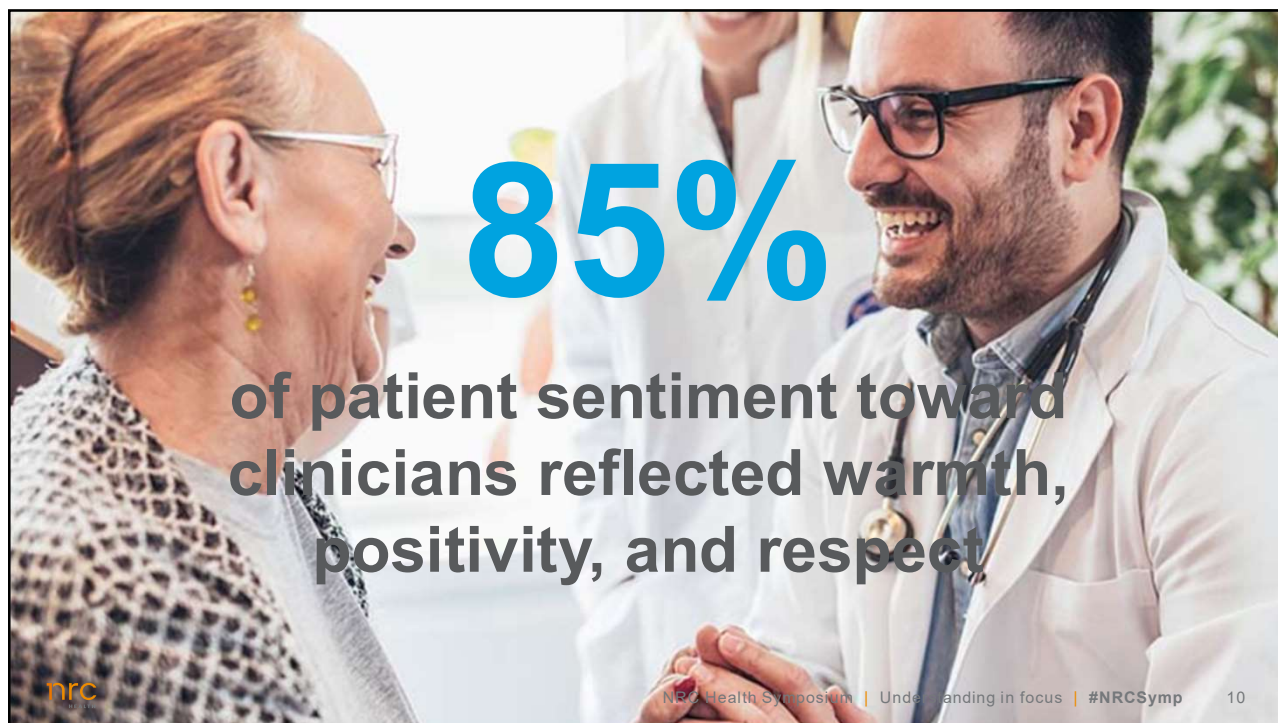
Updated data from the AHA indicates that hospital financial losses will grow by a minimum of \$120.5B from July 2020 through December 2020, adding to the \$202.6B in losses from earlier this year.

**Record number of healthcare workers laid off, furloughed during pandemic**


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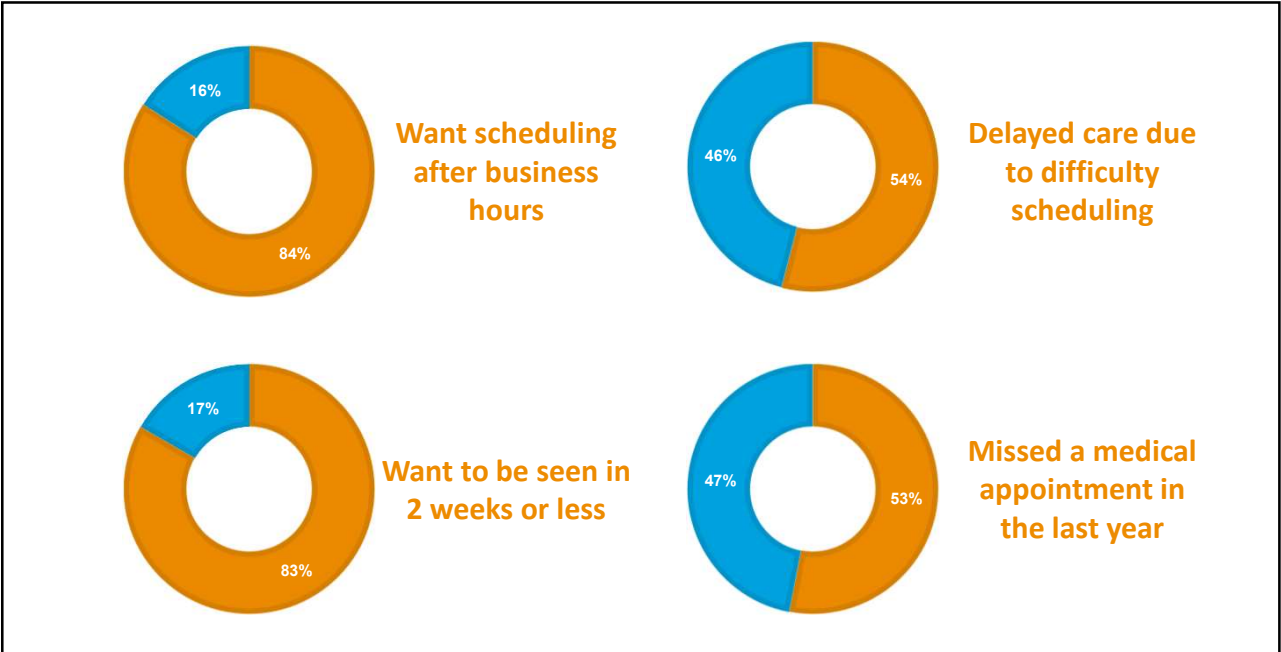


**80%** of consumers would switch providers for “convenience factors” alone

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Category	Percentage
Want scheduling after business hours	84%
Delayed care due to difficulty scheduling	54%
Want to be seen in 2 weeks or less	83%
Missed a medical appointment in the last year	53%

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Positive admission comments =

46x

more likely to be a promoter

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Positive wait time comments =

20x

more likely to be a promoter

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## The Economics of Loyalty

INCREASE MARKET SHARE

40%

of consumers are not loyal to a healthcare brand

ATTRACT NEW CUSTOMERS

\$1.4M

individual lifetime customer value



PREVENT OUTMIGRATION

\$24M

annual cost of 10% outmigration for the average hospital

REDUCE COSTS OF CARE

31%

less cost associated with engaged patients



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# NRC Health and Partners

## By-the-Numbers



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## Since 2017 we are proud to have partnered with 380 health systems...

### Outputs

- Ingest more than **408 Million Patient Records**
- Reach out to consumers more than **346 Million Times**
- Gather feedback from more than **41.5 Million Consumers**
- Utilize NLP to process **10.7 Million Comments**
- Surface more than **450,000 Service/Clinical Issues**
- Publish more than **31 Million Verified Customer Ratings**
- Publish star ratings for **204,000 Providers**
- Sent monthly scorecards to more than **50,000 Providers**

### Outcomes

- Gather **5X More Feedback Per Provider**
- Deliver **93% of feedback within 48 hours**
- Improve CAHPS Measures In 3 months  
**Average "Overall Rate" Increase of 1.2 pts**
- Save on outmigration costs  
**\$10.8 million**
- Increase key metric performance for providers who receive scorecards  
**Score 5pts Higher on Key Metric**
- Improve provider reputation  
**Average Star Rating of 4.7 Stars**





**Allina Health**

### Innovating Amidst Crisis

- ✓ Adjust delivery models
- ✓ Rethink communication strategies
- ✓ Empower staff with positive feedback

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### Taking Care of Each Other

- ✓ Emphasize solidarity
- ✓ Support a safe, compassionate workplace



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## Embracing Ideals

- ✓ Leverage technology for inclusion
- ✓ Strengthen relationships through voice
- ✓ Take a holistic view of the patient journey

# ORLANDO HEALTH®

## Addressing Customer and Provider and Concerns

- ✓ Incorporate physician feedback
- ✓ Become a source of truth
- ✓ Source connection channels for isolated patients





# HARRISHEALTH SYSTEM

## Reimagining Delivery

- ✓ Mobilize to meet demand
- ✓ Deploy telemedicine platform
- ✓ Future-proof customer experience

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01

To position your organization with customers, understand their decision-making process.

**JENNIFER MCCLEAN**  
*VP of patient experience, Mercy Health*

Understand the entire customer journey to attract and acquire new customers.

02

Everyone wants ease. But be careful—consumers perceive ease differently.

**BRIAN CURTISS**  
*Marketing director, BayCare Health System*

Incorporate omni-channel strategies to reduce friction and improve customer retention.

03

High aspirations are good. Consistency is better.

**ABHISHEK DOSI**  
*CEO, Sutter Solano Medical Center*

Systematically listen to the voice of your customer to attain efficient, actionable insight.



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