



WHITE PAPER

The future of patient feedback is here

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The future of healthcare has arrived—sooner than anyone expected.

Even before the onset of COVID-19, health systems were facing a stark moment in their evolution. Consumerist culture was asserting itself in the marketplace. Elevated expectations had organizations totally refashioning their approach to care. The boundary between patient and consumer was blurring as health systems expanded their footprint beyond the four walls of their facilities.

Far from putting a halt to these trends, the coronavirus has accelerated them. If these concerns were urgent before, they're critical today.

To keep up with the pace of change, health systems cannot rely on the feedback mechanisms that served them before. They'll need a more expansive view of whom they serve, and of what it means to serve them. They'll need to understand their customers not only as patients, but as people. They'll need, in short, a **comprehensive Voice of the Customer platform**.

With such an asset, organizations will be able to take a more holistic view of their customers, and develop a consistent approach that spans every touchpoint, across the entire continuum of care.

This may seem like an aspirational idea. But as with other developments in the industry, the future of patient feedback is already here—so long as organizations take the initiative to rectify it.

This paper outlines the strategic importance of revitalizing patient-feedback operations, along with specific tactics organizations should consider. It will show leaders how to better hear the voice of the customer, how to put what they learn to use, and ultimately, how to develop a deeper, more thorough, more human understanding of their patients.

Why a comprehensive view matters

The question of human understanding has never been more urgent. As NRC Health has submitted before,¹ capturing a fully realized portrait of the healthcare consumer is critical for sustainable health-system strategy.

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1 NRC Health. (2018.) "Effortless Care Experiences." NRC Health. Retrieved April 19, 2020, from: <https://nrchealth.com/resource/effortless-care-experiences/>

Why is achieving this understanding so important? In a word: **loyalty**.

Earning consumer loyalty is largely dependent on a health system's ability to take a comprehensive view of their customer. This loyalty, in turn, is an increasingly important driver of organizational success in the consumer-driven marketplace.

For instance, at present rates of healthcare cost inflation,² the lifetime value of a 30-year-old's healthcare spending is about \$1.5 million. If that 30-year-old brings their spouse and children along, the cumulative value of their loyalty is about \$20 million. From a strict balance-sheet perspective, loyalty is a prize indeed.

Revenues are not, however, the only side of the story. Loyalty also unequivocally bolsters health systems' ability to serve their patients. Loyal customers also lead to reduced costs³ and even improved clinical care coordination.⁴

Furthermore, the central importance of loyalty is only likely to increase, in step with the rising influence of consumerism. As care becomes less dependent on centralized hospital facilities, as demand for lifestyle-oriented care programs rises, and as non-traditional providers continue their aggressive expansion into the fray, brand loyalty will be all the more vital for health systems looking to defend their position in the marketplace.

And that loyalty can only arise from a concerted, data-based understanding of the customer.

Toward achieving human understanding

With the importance of understanding the customer so well established, the question remains how best to achieve that goal. Health systems must secure a multidimensional perspective of their customer that includes every point of contact with the organization—before, during, and after the encounter.

Such a perspective can only be as valid as the data that informs it. Hence, to achieve a more fully realized portrait of their customer, health systems should emphasize the acquisition of rapid, robust, reliable, and contextualized information about consumers.

The following three tactics should help organizations collect and analyze customer data more efficiently.

01 Living survey content

A lot can change in a year; still more in a decade. And yet the standard instrument for evaluating hospital-customer experiences has not meaningfully changed since 2008.⁵

In the face of rapidly evolving consumer sentiment, outdated survey instruments can be a serious liability. When survey content fails to reflect the mindsets and preferences of respondents, it can depress response rates, compromise data quality, or—worst of all—alienate customers.⁶

Which makes the case for why healthcare surveys should be living documents, continuously updated to suit the needs of health systems and the patients they

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is the lifetime value of healthcare spending for a 30-year-old, spouse and two children

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- 2 Agency for Healthcare Research and Quality. (2017.) Medical Expenditure Panel Survey. Generated interactively, Wednesday, June 17, 2020, at: https://meps.ahrq.gov/mepstrends/hc_use/
 - 3 Rogg, J. G., Rubin, J. T., Hansen, P., and Liu, S. W. "The Frequency and Cost of Redundant Laboratory Testing for Transferred ED Patients." *The American Journal of Emergency Medicine*, 31(7), 1121–1123. 2013. Accessed at: <https://doi.org/10.1016/j.ajem.2013.03.037>
 - 4 Wilson, S. "How Care Coordination Can Improve Patient Outcomes." September 21, 2017. Retrieved September 5, 2018, from: <https://www.cerner.com/blog/how-care-coordination-can-improve-patient-outcomes>
 - 5 CMS. (2019.) HCAHPS Online Fact Sheet. Accessed at: https://hcahpsonline.org/globalassets/hcahps/facts/hcahps_fact_sheet_october_2019.pdf
 - 6 Hrды, H. (2019.) "Why HCAHPS Is Archaic In Healthcare Today—Op-Ed." Healthcare IT Consultant. <https://hitconsultant.net/2019/12/13/hospitals-want-hcahps-revised-heres-why/>

serve, and based on best practices from across the nation and local regions. More broadly, feedback teams should expand beyond standardized instruments, and configure surveys to suit the specific needs of their patient populations. For signs of success, health systems should pay particular attention to measurements of internal consistency and strong correlations to desired outcomes.

02 Modern modalities

Digital technologies have transformed the way consumers interact with every sector of the economy. Healthcare is no exception. As with everywhere else, consumers want a full range of options for how, when, and where health systems solicit their opinion—including options that are digital first.

This comes just as consumers are making clear that older, mail-in survey modalities aren't suited to their tastes. (Which may explain why average HCAHPS response rates hover at around 26.7%.⁷)

NRC Health's research has found that healthcare patients overwhelmingly prefer omni-channel feedback, combining traditional feedback mechanisms with IVR, SMS, and email. The effect is particularly pronounced among Millennial patients, whose response rates improved by as much as 22% after a transition to include digital collection methodologies.⁸

As Children's of Alabama can attest, a more robust data-collection process can also have a transformative effect on a health system's culture. After transitioning to a modernized feedback solution, they were able to increase response rates by 400%, giving leaders a much more reliable data-set to work with.⁹

03 Putting feedback in context

Both of the above measures can increase the raw volume of customer data. But a bump in response rates is of limited use if that data isn't properly contextualized. Context gives quantitative data a richness and specificity that raw numbers simply do not capture.

First, there's the broader context surrounding the care encounter. Aside from what happens in the exam room, leaders must also understand the patient's pre- and post-encounter experiences. Health systems need to know what drives the patient's decision-making process before they ever seek care, and how to sustain a long-term patient-provider relationship after discharge.

Second, context also refers to the nuances of the encounter, which too often go unremarked. Each care experience is layered with subtleties that aren't always captured in a survey: smiles from support staff, for example, or the tone of a provider's voice. Taken in the aggregate, these small features can have an outsized effect on the way a patient evaluates their encounter. It's the "halo effect," writ large.¹⁰

The only way to truly capture these nuances is by soliciting open-ended feedback from patients. The challenge for organizations is to find a way to capture these comments en masse and render them legible for analysis.¹¹

Recent developments in artificial intelligence (AI) serve this role neatly. Not only can modern software collect open-ended feedback from patients, but healthcare-

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400%

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- 7 Heath, S. (May 1, 2019.) "HCAHPS Survey Non-Response Bias Impacts Scores, Practice Improvement." *PatientEngagementHIT*. Accessed at <https://patientengagementhit.com/news/hcahps-survey-non-response-bias-impacts-scores-practice-improvement>
 - 8 NRC Health. (March 16, 2018.) "What's Possible When You Look Beyond CAHPS?" NRC Health. Accessed at <https://nrchealth.com/whats-possible-look-beyond-cahps/>
 - 9 NRC Health. (2019.) "To Change the Culture of Their Hospital, Children's of Alabama Relied on Real-time Feedback." Accessed at <https://nrchealth.com/wp-content/uploads/2019/04/Childrens-of-Alabama-Case-Study.pdf>
 - 10 Jackson, S. (2017.) "A New Benchmark for the Individual Experience: N=1." *Becker's Hospital Review*. Retrieved April 19, 2020, from: <https://www.beckershospitalreview.com/patient-experience/a-new-benchmark-for-the-individual-experience-n-1.html>
 - 11 NRC Health. (2019.) "Authentic Voices: What Natural Language Processing Reveals About Your Patients." *Becker's Hospital Review*. Accessed at: <https://www.beckershospitalreview.com/healthcare-information-technology/authentic-voices-what-natural-language-processing-reveals-about-your-patients.html>

specific natural-language processing (NLP) technology and corresponding machine-learning algorithms also effortlessly aggregate and analyze it.

MU Health discovered as much when they used such tools to contextualize their customers' feedback data. The richness of what they learned helped frame patients' opinions as a coherent narrative, which in turn helped leaders press their case for organizational change.¹²

Deploying data's potential

Hearing healthcare customers' voices is an important first step toward a modernized experience. Much will also depend, however, on how health systems use their newly gathered insights to cultivate loyalty among their customers.

Here are three tactics leaders might consider.

01 Offer transparency

Data and analytics have ushered in an era of transparency. Apps on our smart devices have conditioned American consumers to expect full disclosure for nearly any product or service they consider; 60% of consumers have selected their doctor based primarily on online ratings and reviews.¹³ CMS has mandated that hospitals publish their pricing data,¹⁴ and the number of start-ups offering healthcare transparency to consumers is growing every year.¹⁵

In the face of these mounting demands, offering a full view of relevant experience data—especially on their own digital properties¹⁶—is an excellent way for health systems to take the initiative.

This is what OrthoNebraska found when they began to publish verified ratings and comments on their patient-facing website. In publishing a constant stream of reliable, user-generated content, these ratings and comments greatly improved search-engine optimization on OrthoNebraska's web properties. This in turn helped to elevate the system to a market-defining position for local web search, increasing unique monthly visitors by 21% and online appointment requests by 49%.¹⁷

02 Perfect service recovery

No matter how well designed, every healthcare service line will eventually stumble and leave a patient unhappy with their experience. The days that follow such hiccups may be some of the most important in the entire patient-provider relationship.

Patients pay keen attention to how their providers correct a service mistake. It's a delicate moment for healthcare organizations: if they get it right, they can heal a breached relationship, and may end up with an even more loyal patient than they had before.¹⁸ If they get it wrong, however, they might lose the patient forever—at tremendous cost to the organization.

The how of service recovery, then, is crucial to get right. But just as important is the when. In the event of a service error, providers have an extremely narrow window to make amends. Most patients want to hear from their providers within two days of a service mistake; **they consider their loyalty "unrecoverable" if a mistake goes uncorrected for just one week.**¹⁹

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21%

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49%

increase in online appointment requests

12 NRC Health. (2019.) "Authentic Voices: Enriched Insights through Real-time Feedback." *Becker's Hospital Review*. Accessed at: <https://nrchealth.com/wp-content/uploads/2020/01/MU-Health-AaG.pdf>

13 Ibbotson, A. (2018.) "Patients Trust Online Reviews As Much As Doctor Recommendations (and Other Shocking Facts About Transparency In Healthcare)." *Health IT Outcomes*. Accessed at: <https://www.healthitoutcomes.com/doc/patients-trust-online-reviews-as-much-as-doctor-recommendations-0001>

14 Ehnes, C., Dauner, C. D., and Dougherty, T. (N.D.) "10 Things to Expect from the New Hospital Price Transparency Rule." *Health Affairs*. Retrieved April 16, 2020, from: <https://www.healthaffairs.org/doi/10.1377/hblog20200304.157067/full/>

15 Shortlister. (2020.) "List of Healthcare Price Transparency Companies | Top Healthcare Price Transparency Tools Jan. '20." Myshortlister.com. Retrieved April 16, 2020, from: <https://www.myshortlister.com/healthcare-price-transparency-companies/vendor-list>

16 NRC Health. (July 3, 2018.) "290,000 Patients Agree—Your Website Matters!" NRC Health. Accessed at: <https://nrchealth.com/290000-patients-agree-website-matters/>

17 NRC Health. (2019.) "Real-time and Star Ratings Enabled Strategic Victories for Midwestern Organization." Accessed at: <https://nrchealth.com/wp-content/uploads/2019/05/Ortho-Nebraska-Case-Study.pdf>

18 Hart, C. W., Heskett, J. L., and Earl Sasser Jr., W. (July 1, 1990.) "The Profitable Art of Service Recovery." *Harvard Business Review*, July–August 1990. Accessed at: <https://hbr.org/1990/07/the-profitable-art-of-service-recovery>

19 NRC Health. (2020.) "2020 Healthcare Consumer Trends Report." NRC Health. Accessed at: <https://nrchealth.com/resource/2020-healthcare-consumer-trends/>

If health systems are to enact such a quick cadence of service recovery, they first must be able to quickly identify service mistakes. This requires both the speedy collection of experience data (within hours of the care encounter, if possible), and an equally expedient analysis of it.

Phoenix Children's Hospital developed both of these capabilities shortly after deploying a real-time feedback solution across their clinics and their emergency department. This enabled them to streamline their processing of patients' comments, which in turn rapidly accelerated their service-recovery process. By automatically identifying patients in need of extra support, Phoenix Children's Hospital was able to reach 100% of dissatisfied patients within just two days of discharge.²⁰

03 Stay connected

Finally, capturing voices across the longitudinal journeys of consumers and patients can help organizations expand the terms of their relationships with patients.

To win enduring consumer loyalty, health systems cannot simply present themselves as healthcare needs arise. Patients are hungry for a deeper connection with their providers. They want organizations to play a meaningful role in their broader health decisions.²¹ They rely on their providers for information and guidance.²² They want health systems to help preserve their wellness, not just manage their illness or injury.²³

Here, though, organizations should be careful. Patients have extended them an invitation to come into their lives; it should not be mistaken for permission to be intrusive. Health systems like Community Health Network (CHN) have used modern intelligence tools to strike this delicate balance. The system was, for instance, able to refine its marketing messages to increase consumers' likelihood to turn to CHN for services, and it used automated post-discharge calls to garner tens of thousands of positive comments for staff members.²⁴

CHN's learning to reinforce its brand without forcing itself uncomfortably on its consumers is an example many health systems could emulate.

Aiming even higher

Taking the above steps will improve any health system's relationship with its customers. That should not suggest, however, that these tactics are the furthest limit of what organizations should strive for.

On the contrary, a comprehensive Voice of the Customer approach will draw upon a host of novel solutions to deliver the insights that organizations need. A broader, ecosystem-based approach—including the following four ancillary tactics—will offer organizations a broader and richer view of the people they serve.

EMBEDDING INTO DAILY WORKFLOWS

Many daily healthcare operations are conducted through workflows like electronic health/medical record systems (EHRs/EMRs). Progressive organizations are also starting to make use of customer relationship management systems (CRMs) to create a unified view of their customers and to

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20 NRC Health. (2018.) "Using Real-time Feedback and Transparency For Radical Hospital Transformation." Accessed at: https://nrchealth.com/wp-content/uploads/2017/06/Phoenix_CaseStudy_V12_LC.pdf

21 Jackson, S. (2018.) "The Patient As Consumer: A Shift in Perspective to Better Measure Success." *Becker's Hospital Review*. Accessed at: <https://www.beckershospitalreview.com/patient-experience/the-patient-as-consumer-a-shift-in-perspective-to-better-measure-success.html>

22 NRC Health. (2020.) "Consumer-sentiment Data on the Coronavirus Pandemic, April 2020." NRC Health. Accessed at: <https://nrchealth.com/consumer-sentiment-data-on-the-coronavirus-pandemic-april-2020/>

23 Wynne, B. (2019.) "Who Owns the Patient Experience?" *Becker's Hospital Review*. Accessed at: <https://www.beckershospitalreview.com/patient-experience/who-owns-the-patient-experience.html>

24 NRC Health. (2019.) "Our Work with Community Health Network." Accessed at: <https://nrchealth.com/wp-content/uploads/2019/08/Customer-Intelligence-Platform-Our-Work-with-Community-Health-Network.pdf>

drive engagement across the continuum of care. Embedding healthcare voices and insights into these daily workflows can dramatically improve impact at the point of care. This can allow healthcare systems to take proactive and rapid action, thereby creating a loyalty differentiator.

VIRTUAL ADVISORY PANELS

Creating a digital cohort of consumers and patients within a community model can go a long way in deepening loyalty connections. A standing committee of engaged consumer stakeholders can keep organizational decision-making grounded in consumer concerns. Furthermore, by encouraging a select group of patients to get involved, organizational leaders can give their broader patient base an authentic sense of representation and enfranchisement. It's an elegant way for leaders to expand what healthcare organizations hear from their customers.²⁵

WEB-PRESENCE MONITORING

Much of modern life is mediated through the internet—and patient-provider relationships are no exception. The sprawl of web-based interactions and commentary, however, can be dizzying to keep track of. Fortunately, existing technologies enable health systems to take a global view of how consumers talk about them online. Health systems can use broad-spanning alerts, deployed across dozens of platforms and thousands of webpages, to help reign in any misconceptions about their organizations.

AI-AUGMENTED INSIGHTS

Though the precise mechanism is not yet clear, artificial intelligence (AI) will, in the very near future, play a defining role in healthcare experiences. Some possible avenues include AI-driven decision support, ultra-precise consumer segmentation, or even mass customization of the care experience itself. Any one of these technologies would have a transformative effect on a health system's operations; we're likely to see all three become available within the decade.

A foundation of future consumerism

The voices of your customers aren't just helpful assets for experience-process improvement, or new loyalty strategies, or ways to address service concerns at the individual level. They're the foundation for developing healthcare customer intelligence. Understanding what customers have to say is the fundamental basis of a more complete, more holistic, and more fully human view of the patient.

Human understanding is the foremost of our ambitions in healthcare. The collection, analysis, and deployment of a comprehensive Voice of the Customer platform, and the actionable insights that result, will help us realize it.

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25 NRC Health. (2019.) "How MetroHealth Built a Robust and Engaged Community Panel." Accessed at: <https://nrchealth.com/wp-content/uploads/2019/02/Metro-Health-Case-Study.pdf>

**NRC Health helps healthcare organizations
better understand the people they care for and
design experiences that inspire loyalty.**

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