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# Building A Digital Transformation Roadmap – Aligning Technology, Team, & Processes For Superior Consumer Experience & Engagement: The 2023 *OPEN MINDS* Seminar



LMCP Program

September 19, 2023 | 1:30 pm – 4:30 pm ET



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Chief Strategy Officer  
*OPEN MINDS*



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Senior Association  
*OPEN MINDS*



# Problem We Are Addressing Today

- Much focus has been on digital strategies for health and human service organizations. A post-pandemic strategy involves a multi-pronged technology-driven approach that leads to streamlining processes and higher performance. While the pandemic experience accelerated the use of technology to support consumer access, **using a technology strategy to assure business success goes beyond a consumer digital interface**. Attendees will gain insights into a digital-first approach focused on consumer experience, organizational efficiency, resiliency, growth, and sustainability. Key objectives include:



# Objectives For Today's Seminar

- I. Understanding what it means to be a digital-first organization
- II. The role of Technology in Strategy
- III. Reviewing the eight dimensions of quality using a digital-first framework
- IV. Evaluating Digital First Solutions Integration
- V. Understanding critical organizational competencies needed for strategic technology transformation
- VI. Providing a road map for digital-first evolution





## I. What Does It Mean To Be Digital First?



# What Is A Digital First Mindset?

- What 'Digital First' Means to Us at Johnson & Johnson Consumer Health – YouTube

A digital-first mindset is simply a **business strategy that emphasizes the use of digital technologies to reach customers and achieve business goals**

**Social Media**

**Clinical Decision Support**

**Workflow Efficiencies**

**Billing and Documentation**

**HR Support and Services**

**Website**

**Mobile and Desktop Hardware**

**Consumer Access and Engagement**

**Training**

**Smart Home Technology**



# Technology Functionality To Drive A Digital First Strategy







There are two ways to participate:

1. Go to: **PollEv.com/openminds816**

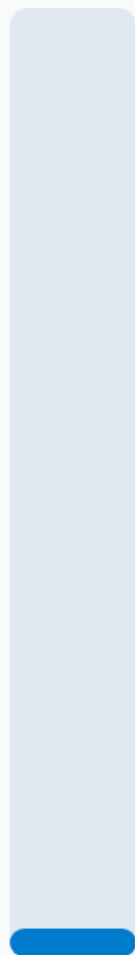
OR

2. Text **openminds816** to **22333** once to join



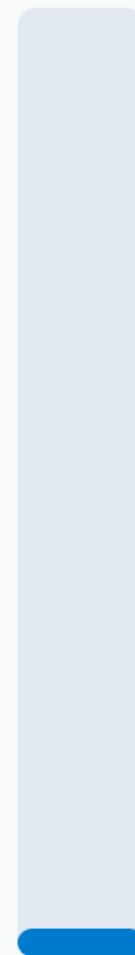
## My organization is using a digital social media approach

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True

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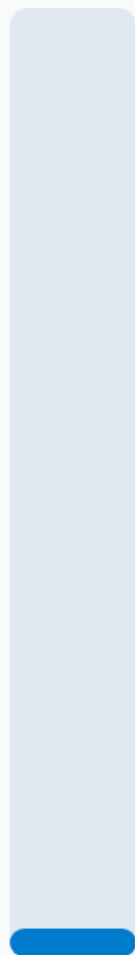


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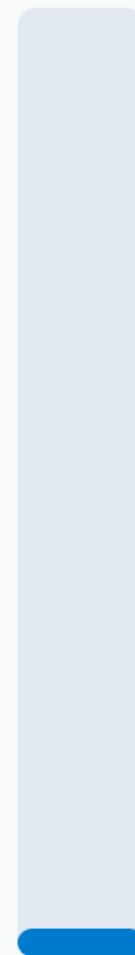
My organization has digitized some aspect of our website

0%



True

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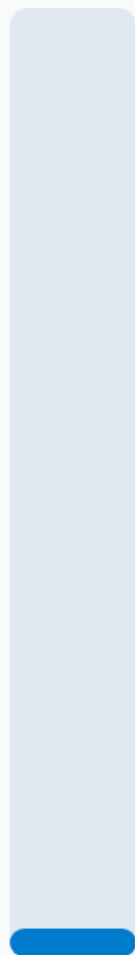


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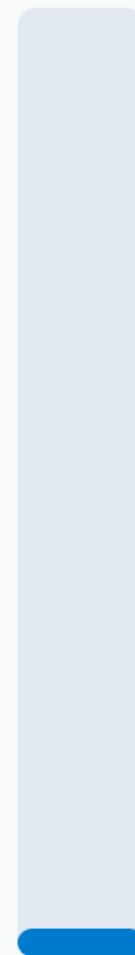
## My organization is utilizing clinical decision support

0%



True

0%

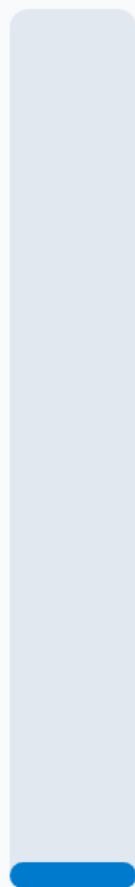


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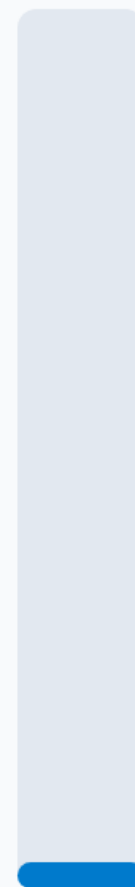
My organization has implemented a digital solution to create workflow efficiency in the past 24 months (HR/Billing/Appt Scheduling/Training)

0%



True

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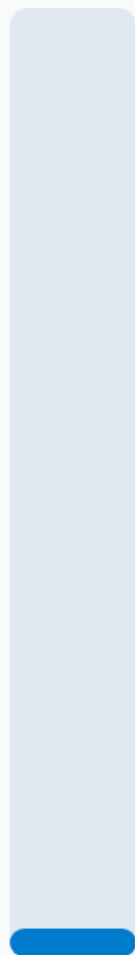


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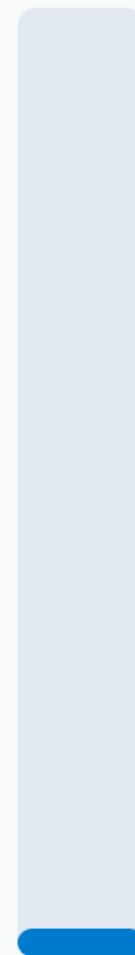
My organization has implemented a smart home technology

0%



True

0%

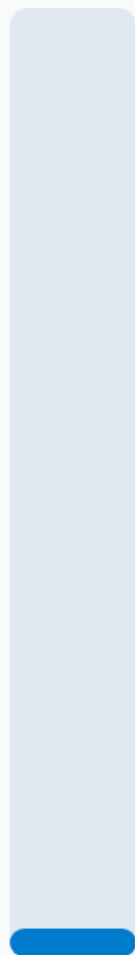


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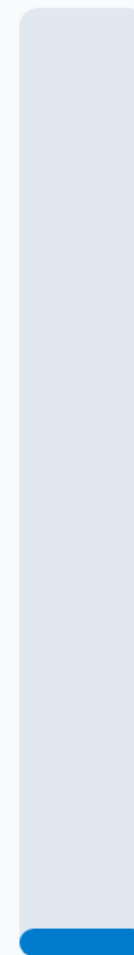
## My organization is using a patient engagement solution

0%



True

0%

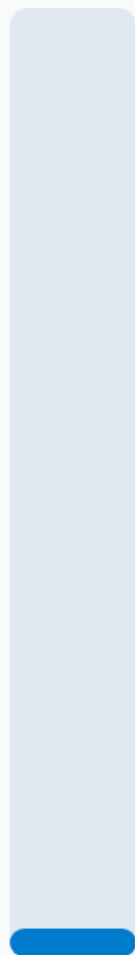


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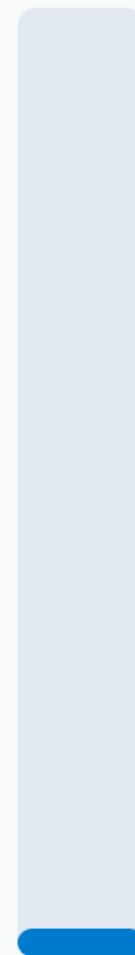
In my organization, I lead the technology strategy from a digital first perspective

0%



True

0%



False





## II. The Role Of Technology In Strategy



# The Role Of Technology Strategy

Technology strategy is a sub-part of your larger organizational strategy:

- Technology and data objectives that are part of your organizational strategy
- Strategy for using technology to meet your organizational objectives

Goal: Achieve required organizational performance

Required for competitive advantage and market positioning



# Shifting Role Of Technology In Health & Human Services





# Six Domains For Digital First Technology Competitive Advantage

I. Provider Network Management

II. Clinical Management & Clinical Performance Optimization

III. Consumer Access, Service, & Engagement

IV. Financial Management

V. Technology & Reporting Infrastructure

VI. Leadership & Governance





### III. Eight Dimensions Of Quality From A Digital First Lens



# Garvin's 8 Dimensions of Quality

- ☒ **1. Performance**  
A performance characteristic describes a product's essential function.
- ☒ **2. Features**  
Features are a secondary aspect of performance.
- ☒ **3. Reliability**  
Reliability is the ability of a product or service to perform as expected over time.
- ☒ **4. Conformance**  
Conformance is the degree to which a product conforms to its specification.



- ☒ **5. Durability**  
Durability is the measurement of product life.
- ☒ **6. Serviceability**  
Serviceability is the ease at which a user can repair a faulty product or get it fixed.
- ☒ **7. Aesthetics**  
Aesthetics refers to the appearance of a product or service.
- ☒ **8. Perceived Quality**  
Perceived quality is the overall opinion of the customers towards the product.



# Eight Dimensions Of Quality

## 1. Performance

- A performance characteristic describes a product's essential function
- HHS Example: Appointments are timely.

## 2. Features

- Secondary Aspect of Performance
- HHS Example: Online Scheduling; Virtual Therapy Augmentation

## 3. Reliability

- The ability of a product to perform as expected over time.
- HHS Example: Good outcomes regardless of in house vs. virtual; location; therapist

## 4. Conformance

- The degree to which the product conforms to expectation
- HHS: Example: Clinical Consistency



# Eight Dimensions Of Quality -- Garvin's Approach

## 5. Durability

- Measurement of the Product Life
- HHS Example: Business Sustainability Measures

## 6. Serviceability

- Ease with which a consumer can have problem/complaint resolved
- HHS Example: Complaint Resolution process and metrics

## 7. Aesthetics

- Appearance of the product or service.
- HHS Example: Website, Office location and ambience

## 8. Perceived Quality

- Customer Opinion
- HHS Example: Net Promoter Score; Satisfaction Surveys



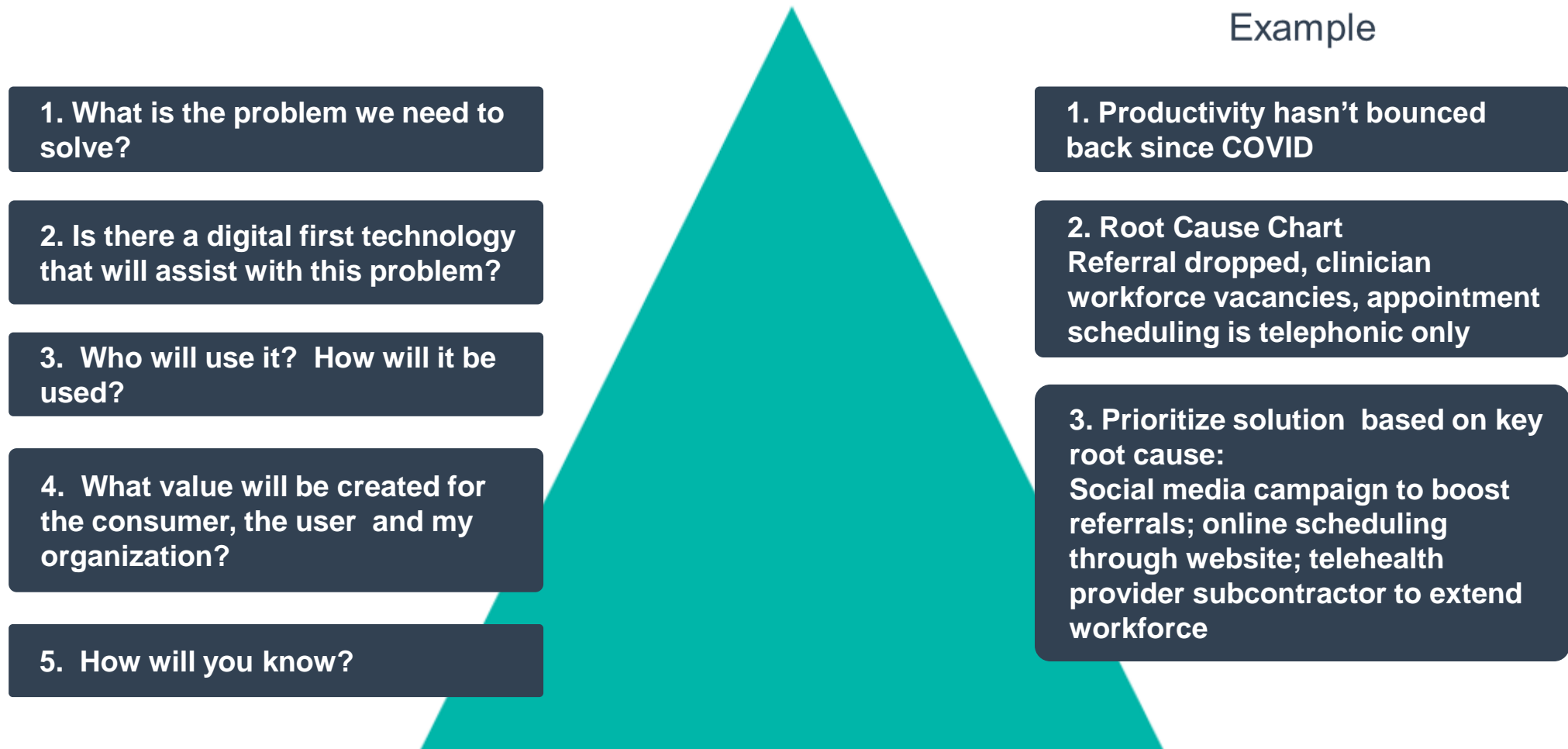


## IV. Evaluating Digital First Solutions & Integration



# How To Move Toward Being A Digital First Organization:

## *Key Questions Every Organization Needs To Ask*





# The Kellogg Logic Model For Program Evaluation

1. What problem are you trying to solve?
2. For whom?
3. Why?
4. How do you plan to solve that problem?
5. Is there a digital first solution that will assist?
6. What resources/actions are needed to execute that plan?



# Logic Model Example: Process Improvements

What's the Problem?	Why? (root cause)	Who Cares?	What will you Do Using Digital First Approach?	Testable?
Problem: Low Productivity	Referrals haven't bounced back since COVID	Board and CEO as Low Productivity Leads to Reduced Revenue and Threatened Business Sustainability	Implement a social media marketing campaign to boost awareness	Track clicks/opens; Monitor referrals to target week over week
Problem: Two Month Wait Times for Standard Therapy Appointment	Staffing Shortage; Low Productivity	Customer, Board and Executive Team as Wait Times Cause Customer to go somewhere else/vote with their feet	Provide a link to your website for online scheduling; provide open times to your main or "want to grow" referral sources	Count clicks/appointments scheduled; Monitor new appointments over time



# Seminar Activity #1

1. Brainstorm one or more of Garvin's quality dimensions using slide 40 and Kellogg Logic Model.
2. Share with the group.

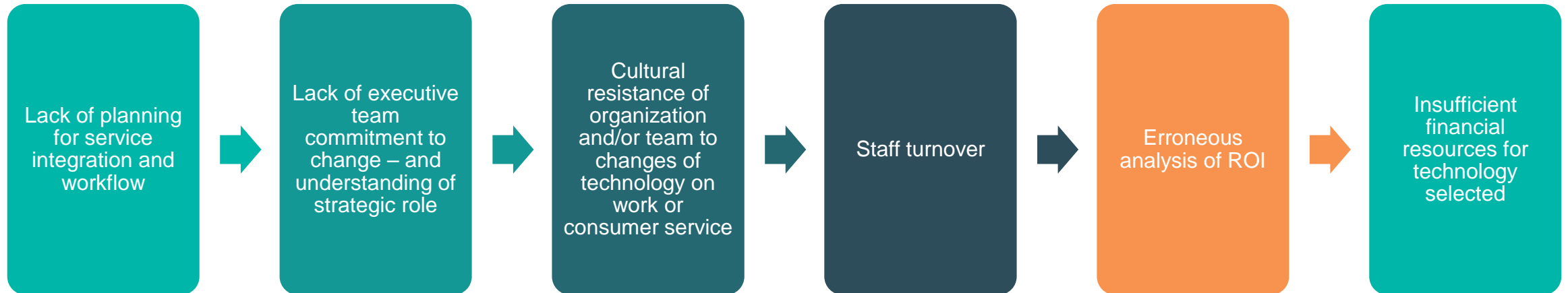




## V. Organizational Competencies



# Why Do New Technology Adoptions Fail?





# 1. Manage The Implementation

- Project planning and project management of implementation is key
- Use change management principles
- Provide personalized and continuous training within the environment:
  - Make training support readily available during the implementation phase
- Recognize that the “implementation phase” is not a fixed period of time:
  - Foster an understanding that implementation will be a part of on-going operations





# Essential Project Management Skills

Communication

Collaboration

Accountability

Time management  
and responsiveness

Facilitation – asking  
the right questions  
and probing

Problem solving

Effective note  
taking/documentation

Using the right tools



## 2. Role Of The C-Suite Leader

**As the fundamentals of sustainability change, leaders need a vision for the future...**

**Leadership needs future-mindedness and prospection to envision the 'next generation' organization**

**The ability to envision the future possibilities for the organization while preparing for the roadblocks that may happen along the way...**



# The Project Sponsor

## Who Is It?

- CEO/COO or C-suite
- Responsible for the ultimate success of the project implementation
- Power to deploy resources

## Skill Set

- Change management
- Resource management
- Internal vision driver

## Involvement

- Meets once a month with the project manager and once a month with the implementation team (or as needed)



# Project Sponsor & Change Management

1. Sets authority and empowers relative range of decision making to Implementation Team.
2. Keep abreast of high-level changes during monthly meetings.
3. Makes key decisions when there are changes to scope of work, risk or budgetary concerns, and consensus struggles.
4. Communicates the need for change across the organization.
5. Actively connected to and engaged with the project.



# The Steering Committee

## Who Is It?

- Usually involves the project sponsor, internal project manager and any c-level suite staff
- Well acquainted with higher level decisions or issues that affect the organization globally

## Role & Skill-Set

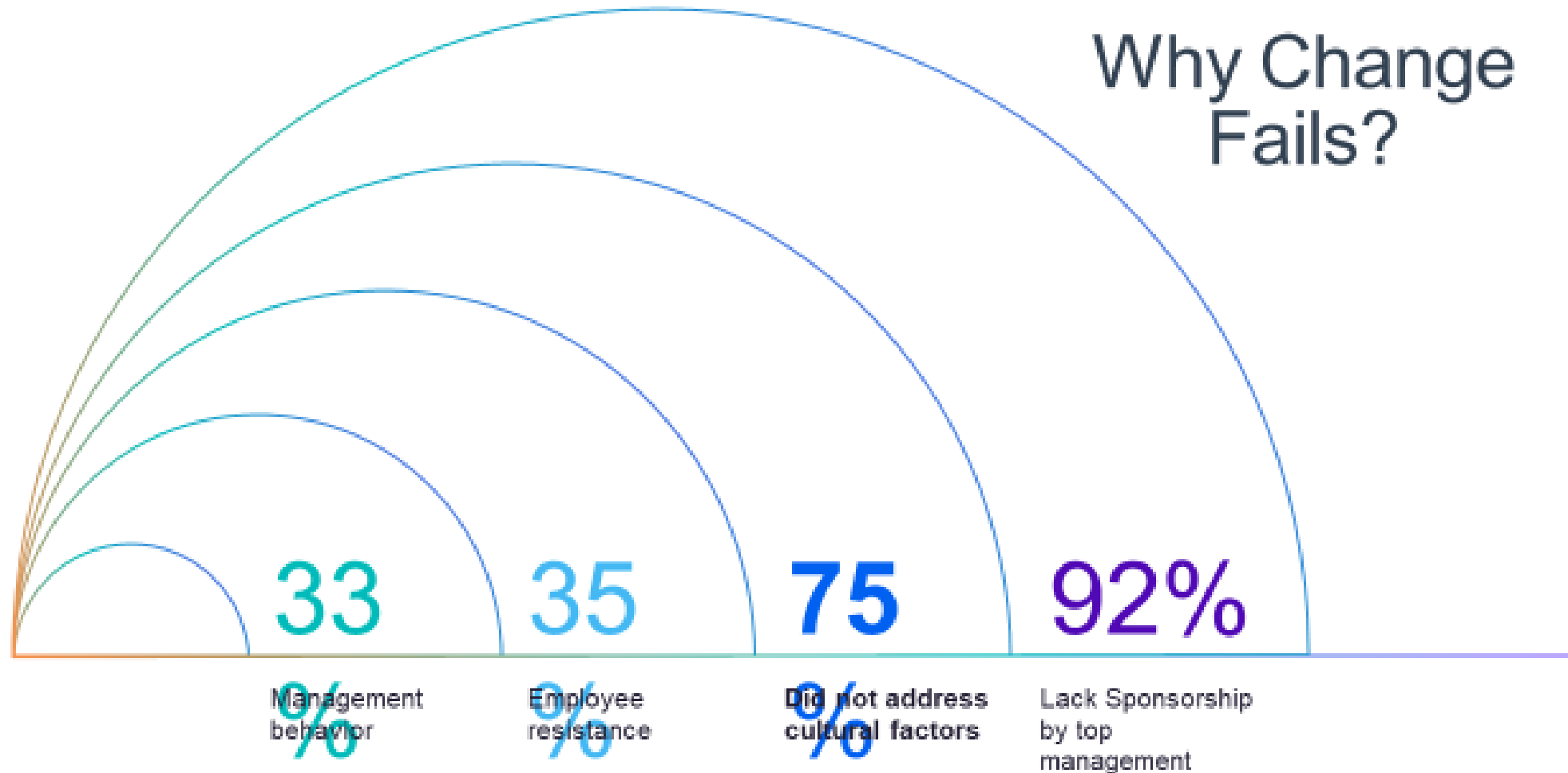
- Provides insight and anticipate problem areas that may affect the project
- Provides direction for resource management and change management
- Reviews high-level status of project
- Examinations any problems areas that have come up during implementation, provide feedback, assign/re-assign resources to resolve problem areas.
- Re-evaluates after a set period of time

## Involvement

- Meets monthly
- Once a month with PM and internal PM (if applicable)
- Once a month with implementation team (unless more meetings are required)

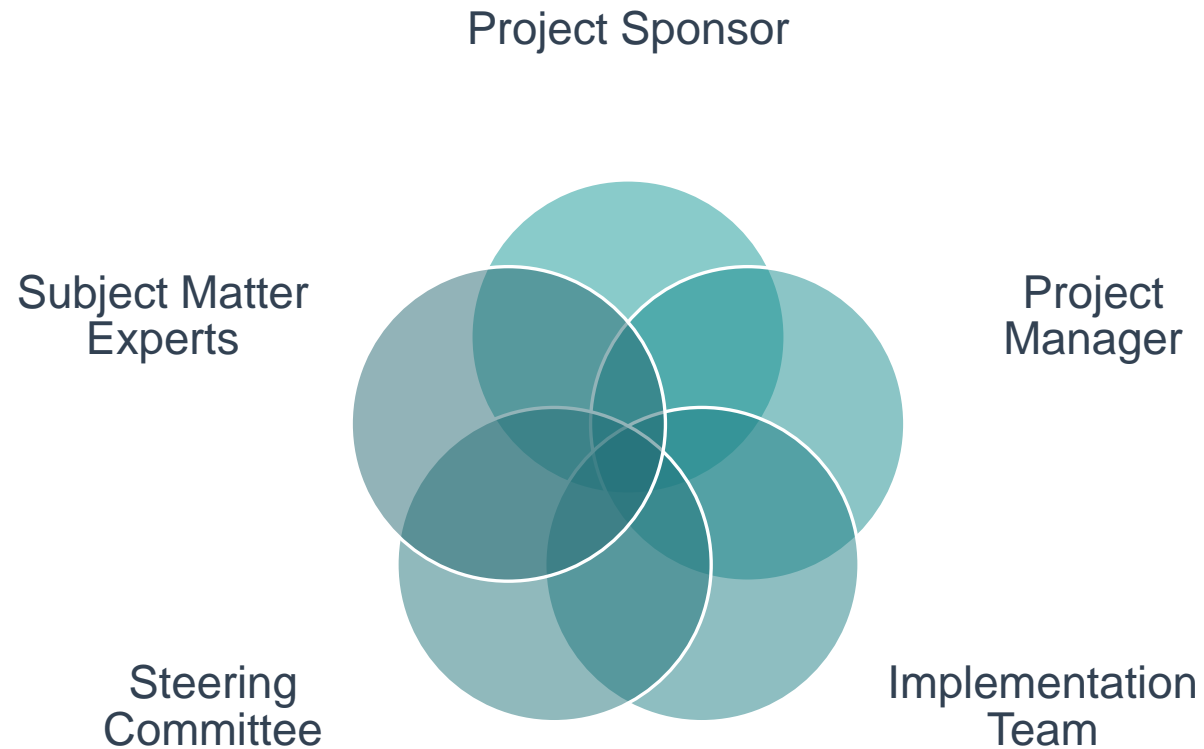


### 3. Change Management





## 4. Developing A Cross-Functional Team





# Red Flag Area: One Individual/Department Can Not Do It All

Many organizations usually look to the following individuals/groups to be involved in project implementations but may not recognize the red flags in their project roles and assignments.

Project Manager	C-Suite Level Officer(s)	Clinicians & Supervisors	Finance	Information Technology (IT)
<ul style="list-style-type: none"><li>• Typically not detail oriented or organized.</li><li>• May not know the organization structure and nuances well</li><li>• May be a new employee or contractor</li></ul>	<ul style="list-style-type: none"><li>• Typically detached from process</li><li>• Not willing to exert internal influence</li></ul>	<ul style="list-style-type: none"><li>• Typically not invested in the project</li><li>• Acknowledges the project as one more task on their plate</li><li>• Attendance to meetings is not consistent</li><li>• Team members are not fully prepared to discuss agenda items at every meeting</li></ul>	<ul style="list-style-type: none"><li>• Typically unwilling to change finance structure</li><li>• May be knowledgeable about the current systems setup but don't want to change for new software</li><li>• Technology information collection skills are typically lacking</li></ul>	<ul style="list-style-type: none"><li>• Typically has not scoped out complete IT readiness for the implementation</li><li>• Does not plan to get new laptops, desktops, tablets, smart phones, and other peripherals</li></ul>

Therefore, developing a cross-functional team will decrease the likelihood of a failed implementation and delays due to staff turnover



# Subject Matter Experts

## Who Is It?

- Usually, staff that have very intimate knowledge about particular programs and departments.
- They usually are doing the work themselves or supervising or managing other personnel who are.

## Role & Skill-Set

- They provide ground-level insight into a particular area, program or department.
- They routinely are engaged in this particular field of expertise.

## Involvement

- Meets with Implementation Team and Project Manager as needed.
- They are usually less engaged during the start of the project.
- They become more engaged with figuring out their program and department specifics as the implementation get underway
- They become invaluable program and department leaders and teachers in the end.



## 5. Tips For Analyzing ROI

1. Start with a **strategic focus** on technology by asking how this specific technology will help your organization achieve desired strategic and operational objectives
2. **Collaboratively** bring technology, finance, and clinical operations staff together to develop the ROI assumptions and model
3. Be **conservative** in your assumptions of financial benefits
4. Build a technology implementation timeline that **accelerates the time period** when benefits begin to be achieved
5. Set **clear milestones and performance metrics** to ensure that the expected return and benefits are achieved
6. While it's complex to use methods and formulas to calculate ROI, your organization needs to identify whether the technology you assess increases your financial margin over the life of the investment



# A Four-Step Process For Showing ROI In Technology Investments

Step 1: Define The Project & The Business Needs



Step 2: Begin To Quantify ROI



Step 3: Recruit & Train, Plan & Implement



Step 4: Evaluate Costs, Revenue & Benefits



# Quantifying ROI

Identify all costs

Estimate benefits

Identify direct  
benefits

Identify indirect or  
intangible benefits  
and set  
improvement targets

Identify all revenue  
opportunities

Document  
assumptions

Perform a sensitivity  
analysis

Identify risks and  
alternatives



# Return On Investment Formula

$$\text{ROI (\%)} = \frac{\text{Project Benefits} - \text{Project Costs}}{\text{Project Costs}} \times 100$$

The return on investment is calculated by dividing the net monetary benefits by project costs.

The net monetary benefits are calculated as the project monetary benefits minus the project costs.



## 6. The Budget Issue

1. Capitalization of the initial purchase is smaller issue
2. The big question—on-going costs of technology and systems to support it
3. Part of financial analysis—breakeven points and on-going P&L
4. It's all about ROI

## Can You Afford The Technology That You Need?

*"Price is what you pay. Value is what you get."*

- Warren Buffet



# The Technology Budget

## Initial & Future Capital Investments

- Identification of the acquisition and replacement costs along with funding sources

## Operating Expenses

- Ongoing expenses to support technology infrastructure, including applications and staff

## Return On Investment

- Assessment of current and potential technology to improve results and increase margin



# Technology Investments Vs. Expenses

Capital Investment—purchase of an asset with a useful life greater than one year:

- Recorded as an asset, so the full amount is not deducted from revenue when purchased
- The accounting useful life used to create an annual depreciation expense may be different than the actual life of the asset (new technologies may make the investment obsolete sooner than expected)
- The source of the investment must be identified

Why does this matter?:

- Capital expenditures often require large amounts of cash
- Organizations should plan for the technology that is needed and identify a plan to finance those needs
- Planning for technology needs for over a longer time period enables the organization work ahead of time to line the cash that will be needed each year



# Key Organizational Competencies & Questions

1. Culture Matters!
2. In transformation, what needs to change within your culture?
3. How will *all of your customers* perceive your digital transformation?
4. What theme are you going to use for your digital transformation?

**THE BOTTOM**  
**LINE** → **CUSTOMERS**  
**MATTER.**



# What comes to mind when you hear the words...







There are two ways to participate:

1. Go to: **PollEv.com/openminds816**

OR

2. Text **openminds816** to **22333** once to join



What comes to mind when you hear the words CUSTOMER SERVICE?

Nobody has responded yet.

Hang tight! Responses are coming in.



## Bad Service Examples

Where do they commonly occur?

1. Restaurants
2. Car Dealerships
3. Airports / Airlines
4. Department of Motor Vehicles
5. Physician Offices
6. Insurance Companies
7. Gas Stations
8. Home Builders
9. Grocery Stores

*What's your story...?*





## Great Customer Service Starts With Leadership



# Your Leadership Role...











Leaders are made, they are not born. They are made by hard effort, which is the price which all of us must pay to achieve any goal that is worthwhile.

— *Vince Lombardi* —

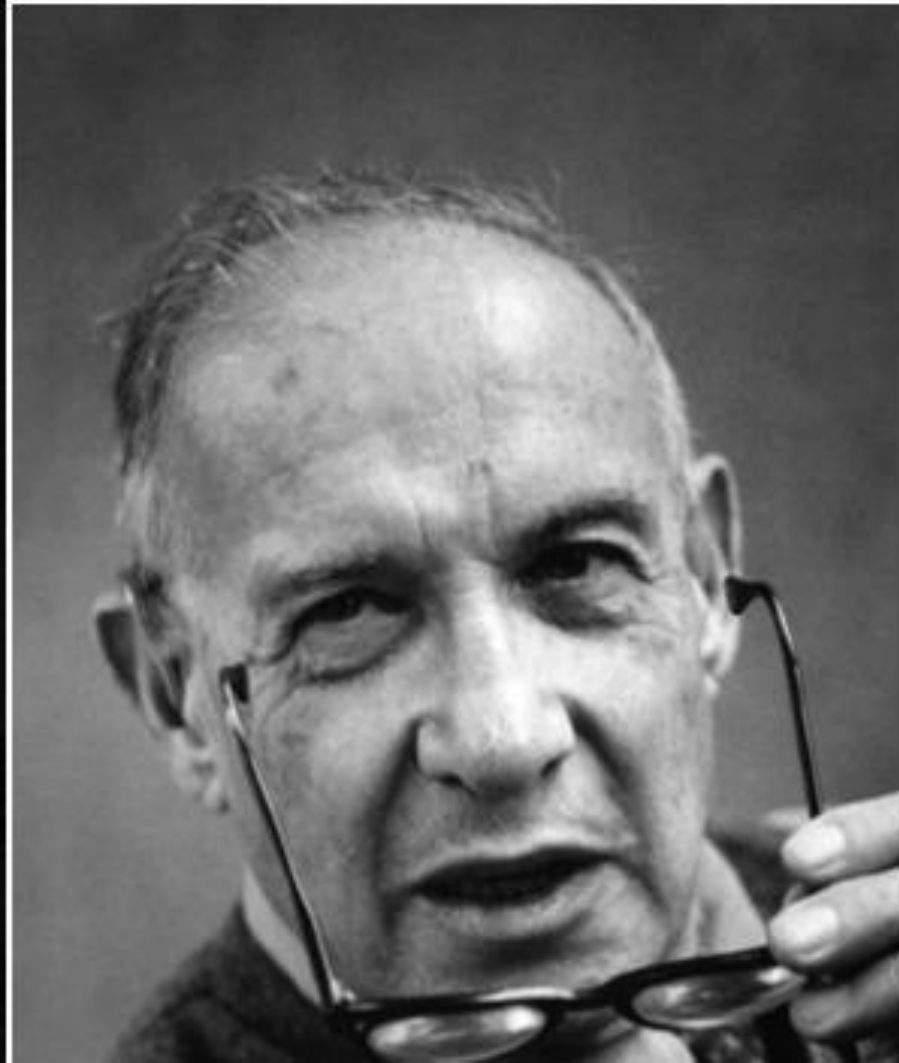


"Do not wait for leaders;  
do it alone, person to person"

~Mother Teresa







The single most important thing to remember about any enterprise is that there are no results inside its walls. The result of a business is a satisfied customer.

— *Peter Drucker* —



*"Do what you do  
so well that they  
will want to see it  
again and bring  
their friends."*





**Don't spend time  
beating on a wall,  
hoping to transform it  
into a door.**

**COCO CHANEL**







## Raving Fan Customer Service

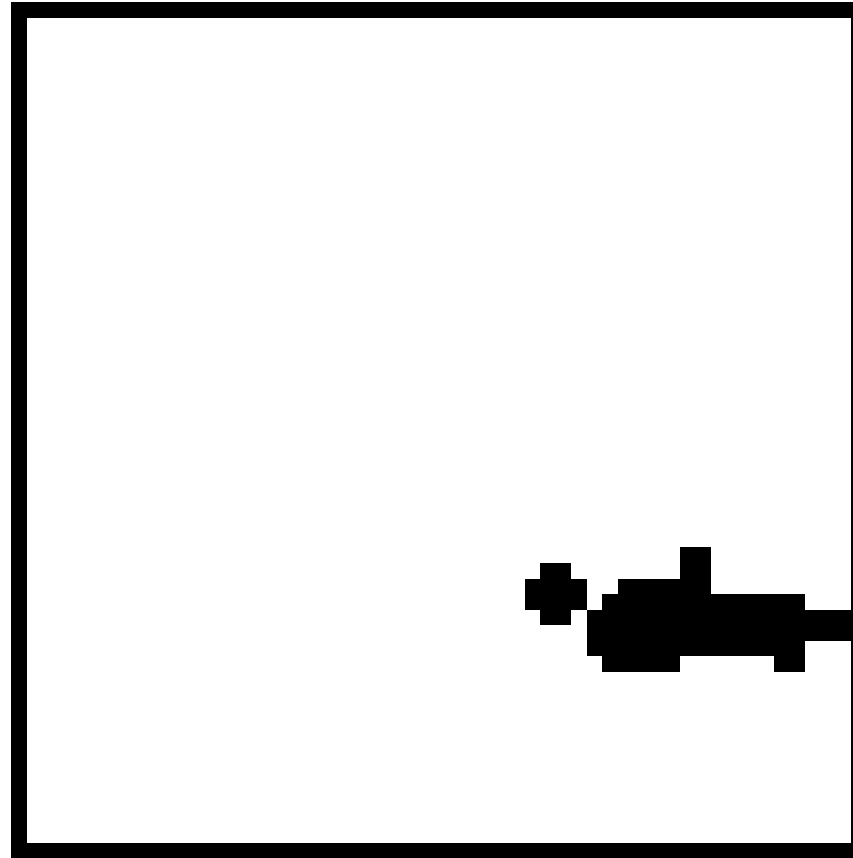


# Who Are You Customers?

1. Fellow Associates?
2. Referral Sources?
3. Vendors?
4. Hospital administrators?
5. Health Plans / payers?
6. Clients/Consumers/Patients?



# The Metaphor For How Most Organizations Address Customer Service







# Raving Fans

**A Revolutionary Approach  
to Customer Service**

**Ken Blanchard**

co-author of *The One Minute Manager®*

**Sheldon Bowles**

Foreword by

**Harvey Mackay**

Satisfied  
Customers  
Just Aren't  
Good  
Enough



# Raving Fans Concept

Raving Fans are individuals who carry the message to other potential fans. How do you get Raving Fans?

- **“Decide what you want.”** Think so far out of the box that you can't even see the box anymore. How extreme can you take your vision when it comes to customer service?
- **"Discover what your customer wants."** Simply ask them. Stay in touch with our core customer. See what their needs and wants are. Blanchard explains that there may be wants from customer that don't fit our vision. These customers need to go elsewhere. *We can't be all things to all people.*
- **"Deliver what you promise, plus one."** Exceed the customer's expectations when you perform.





# Examples

- Ritz Carlton
- Domo Gas
- Nordstrom





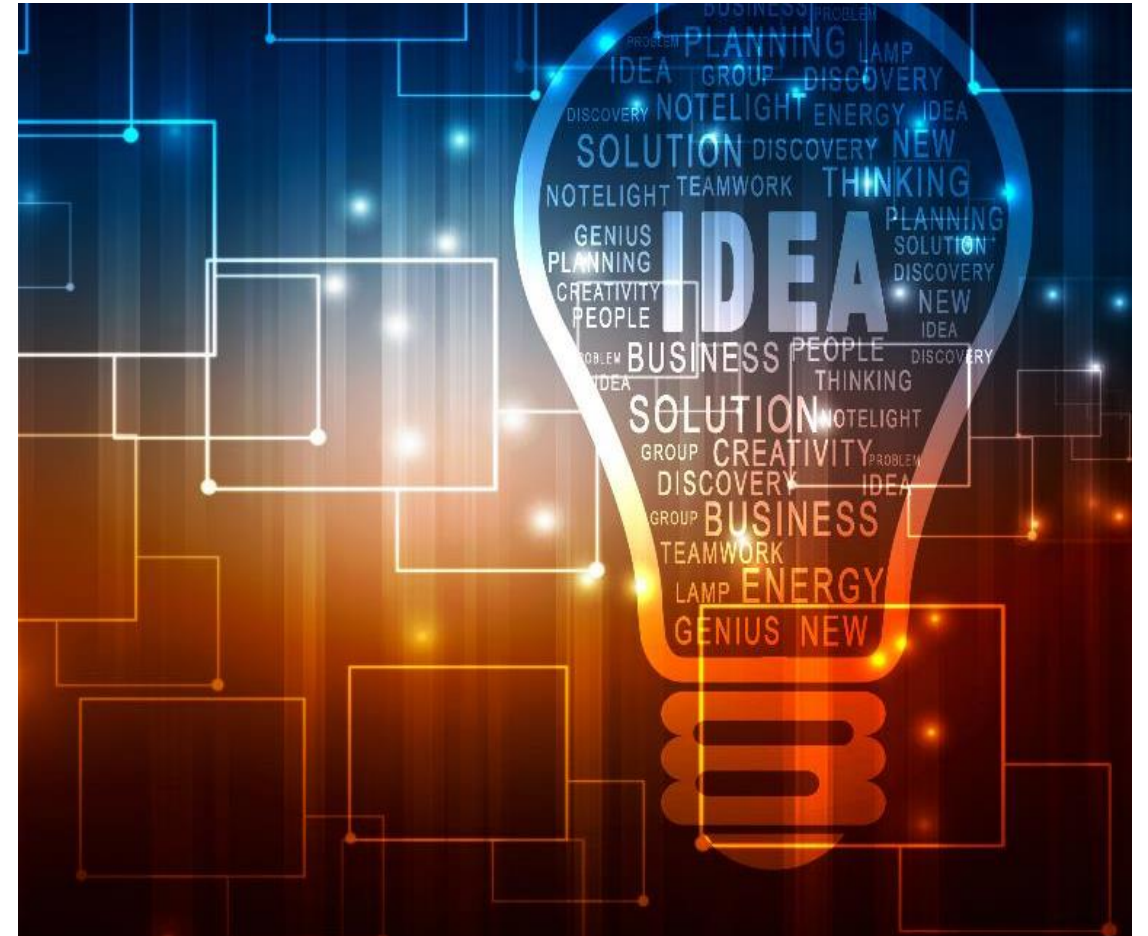
# Methods Of Creating The Raving Fan Experience

- Consistency, consistency, consistency
  - Related to *how* “it’s” delivered
- Start small and get really good at “it”
- Meet first. Exceed second
- Systems and training are key
- Be committed to the “one percent rule”
  - Improve just one percent per week
    - That’s 52% improvement per year!
- Be flexible
  - Related to *what* is delivered



# Translation...

- Blanchard & Bowles indicate the bottom line before you ever reach page ten. “People expect bad goods and rude service, give them junk and they are not surprised.”
- “Just what they expected.” Make sure your customer service slogan isn’t seen by others as “No Worse Than The Competition.”
- We have created a world where we find our expectations easily failed. Therefore, when you do exceed your customer’s expectations, it is almost as if one has taken a yellow marker and highlighted the event. You want your customers to run out of yellow ink!





# Raving Fans – What's The point?

We often spend thousands and thousands of dollars on websites, technology, brochures, and marketing to bring people to our facilities.

Unfortunately, we seldom invest in having those same people—people who utilize our services—become marketers!







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Good

## Raving Fan Behavioral Health

- **Rule #1: Decide What You Want.**

- We want people to walk away from your offices surprised, in a good way, at the service they've received.
- People should be amazed at how friendly, approachable, and helpful you are.
- They should be shocked when they call your offices at how well they are treated. They should know they are an important person to you and your organization.
- The way people are treated should begin with how the phone is answered, the front desk and scheduling (Vice President of First Impressions)
- Decide and train on how your office will handle a call from a consumer or referring physician who is looking for information (Vice President's of Evangelism)?





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## Raving Fan Behavioral Health

- **Rule #1: Decide What You Want.** (continued)
  - Think about people who enter your office to pick-up information or something else
    - How do they feel they're being treated?
    - The reason to exceed these persons' expectations is because you want to create Raving Fans.
    - Remember: Raving Fans are individuals who carry the message to other potential fans.
    - EVERYONE should have a Raving Fan mentality – “How may I serve you?”

What is the message you are trying to create that people will remember as they leave your facility?





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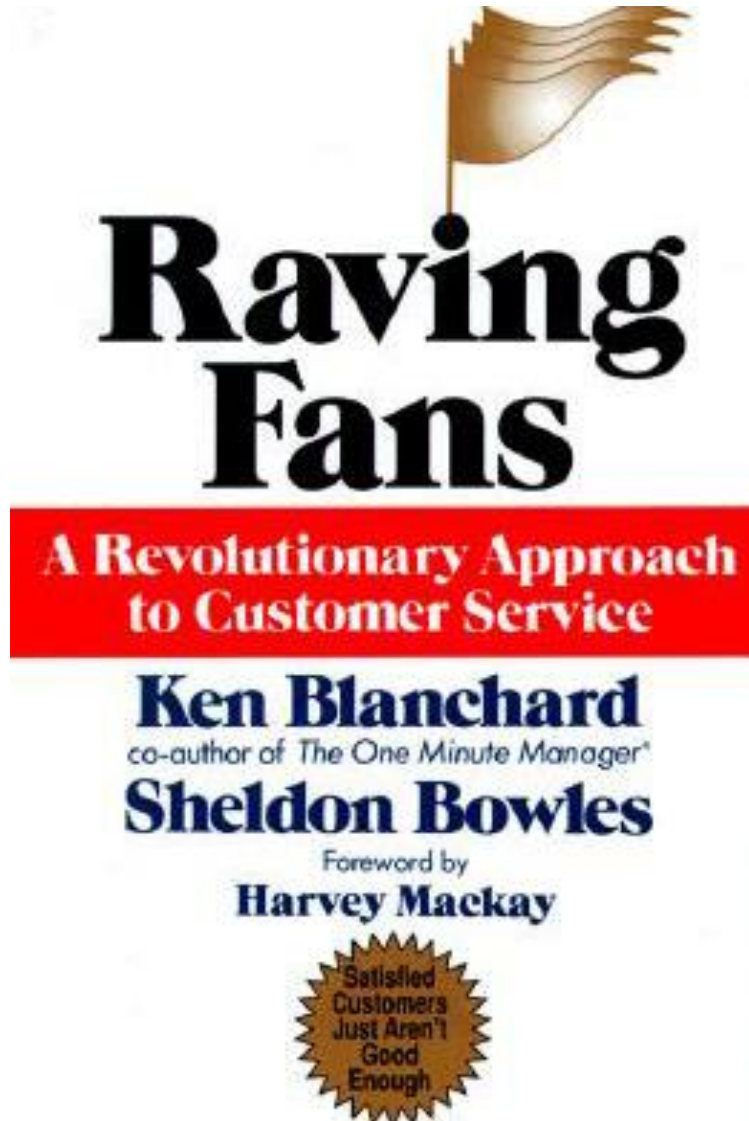
**Harvey Mackay**

Satisfied  
Customers  
Just Aren't  
Good

## Raving Fan Behavioral Health

- **Rule #2: Discover What The Customer Wants.**
  - This rule seems somewhat obvious. Many individuals who utilize your services:
    - Are dealing with (or have a family member who is deal with) some type of behavioral health issue
    - First time consumers are apprehensive, afraid, or even embarrassed
    - Worry about the outcome
    - Others?
  - Think about how YOU would want to be treated
  - Ask your consumers!





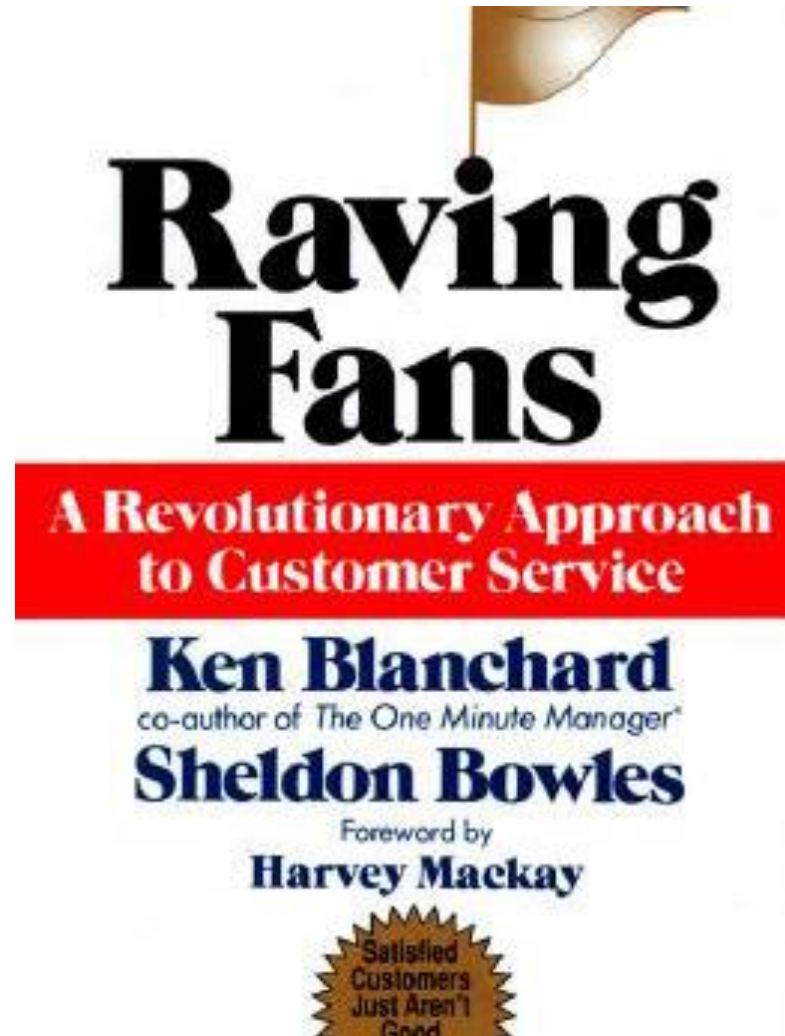
## Raving Fan Behavioral Health

**Rule #3: Deliver Plus 1.** *Deliver to the consumer plus 1%.* That is the way this book explains exceeding one's expectations.

- Example: Customer walks through the door. Front Desk Associate confirms consumer is here and appointment is correct. Front Desk Associate offers the person a beverage which is then hand delivered to the consumer (not from across a counter). Front Desk Associate sits down next to consumer and tells them, within 5 minutes, how long their wait should be and offers them anything to make their wait more pleasurable.

How could you translate this example into something that could work in your organization?





## Raving Fan Behavioral Health

**Rule #3: Deliver Plus 1.** Deliver to the consumer plus 1%. (continued)

The book concludes with a statement, and somewhat of a challenge, that “Satisfied customers just aren’t good enough. They have to be Raving Fans.”

Shouldn’t the same be true for your customers? Customers are simply individuals who choose to utilize your company/agency when they need your services over those of our competitor’s. It doesn’t necessarily mean that they are someone who waves our flag and creates word-of-mouth for your company. However, Raving Fans do *exactly* that.



# How Should You Measure Customer Satisfaction?

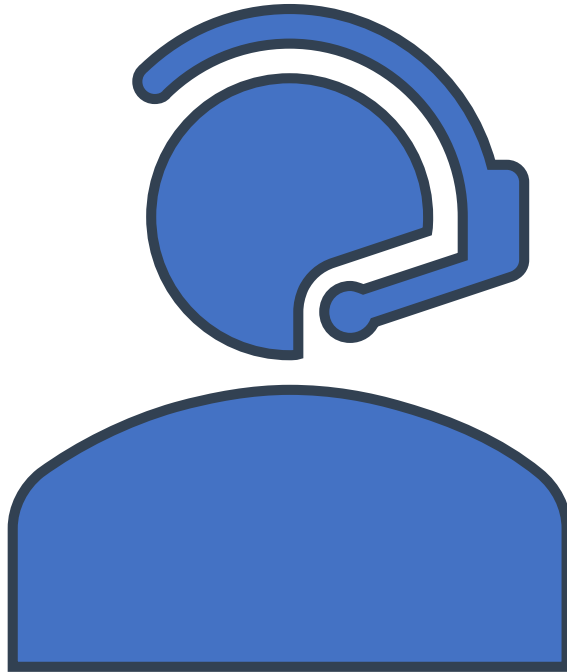
- THE BEST measurement of GREAT customer service is referrals
- Tens of thousands of organizations spend thousands of dollars to measure customer service statistics where, most often, they already know they have a problem

## ***SO WHY DO WE DO CUSTOMER SERVICE SURVEYS?***

- 96% of unhappy customer never complain
- A dissatisfied customer will tell 9 to 15 people
- 13% of dissatisfied customers will tell 20 or more people
- For every customer complaint, there are 26 other unhappy customers who have remained silent



# Better Ways To Measure Customer Service



1. At the Front Deck
2. At scheduling
3. Anyone in contact with the consumer
4. Best Method: ASK!
5. Vital Training: Service Recovery!
6. *LISTEN!* Is there something about your digital transformation strategy that needs adjusting?





## So What? Now What? Your To-Do's





SO WHAT  
**NOW WHAT**





THE ULTIMATE PERSON  
IN CONTROL OF A BAD,  
GOOD OR GREAT  
CUSTOMER SERVICE  
EXPERIENCE AND THE  
SUCCESS OF YOUR  
DIGITAL  
TRANSFORMATION IS...



# YOU





# HOW ARE YOU INVESTING YOUR TIME?









How are **YOU** investing  
**YOUR** time?  
**YOU** can choose!





# What Do We Do Now?!

1. Strive each day to incorporate exceptional customer service into your work and life and culture of your company/organization
2. Be an active member in your organization's growth and development of exceptional customer service, client engagement and customer performance outcomes
3. Meet the expectations of those around you "plus one"
4. Be excited and energized about who and where you are going!
5. Create Raving Fans!
6. Enjoy a successful digital transformation!



## 8 Key Competencies in Summary

1. Excellent Project Management
2. Excellent Communication Skills and differing approach to messaging
3. Training and Personal Approach
4. Understanding and Using Change Management Principles
5. Team Work and Shared Accountability—foster a collaborative spirit
6. Financial Budgeting Skills
7. ROI Evaluation—be ready to track and show value
8. Inspired Leadership
9. Culture Matters!



# Let's Talk about Digital Partner Relationships

## A few other tips: Expectations When Working With Vendors

1. Own your own processes – and don't assume vendors will understand them
2. Do not look solely to vendors to educate staff about potential pitfalls of their product
3. Allow time for any customization, set-up, hardware and technical issues that may arise
4. Develop collaborations when working with vendors
  - A. Explore working with other like-minded organizations as a collaborative group
  - B. Vendors may be more receptive to customize a product for a larger audience



AND NOW A WORD  
FROM OUR SPONSOR





# Virtual Care & Interoperability: How They Affect Efficiency, Customer Satisfaction, & Revenue



September 19, 2023 | 3:00 pm – 3:30 pm ET

LMCP Program



**Nicholas Chepesiuk**

Vice President, Virtual  
Care and General  
Manager, OnCall,  
Qualifacts





**Thank you  
for attending!**

Fill out a  
**RAFFLE CARD**  
for the chance to a  
**\$100 AMAZON GIFT  
CARD** at the end of  
this session!





# **Virtual Care & Interoperability:** How they affect efficiency, client satisfaction, and revenue



## Goals of this Session:

Explain the full spectrum of virtual care for behavioral health.

Provide tips for effectively managing virtual care at scale.





## About the Presenter

### Nicholas Chepesiuk

#### Vice President, Virtual Care & Innovation Qualifacts

Nicholas joined Qualifacts through its acquisition of OnCall Health. Nicholas founded OnCall in 2016 as a telehealth software solution for behavioral health organizations. Now, Nicholas leads the virtual care team at Qualifacts and is also responsible for Qualifacts' innovation strategy including AI. Nicholas is passionate about innovation in healthcare and improving access to behavioral health services.



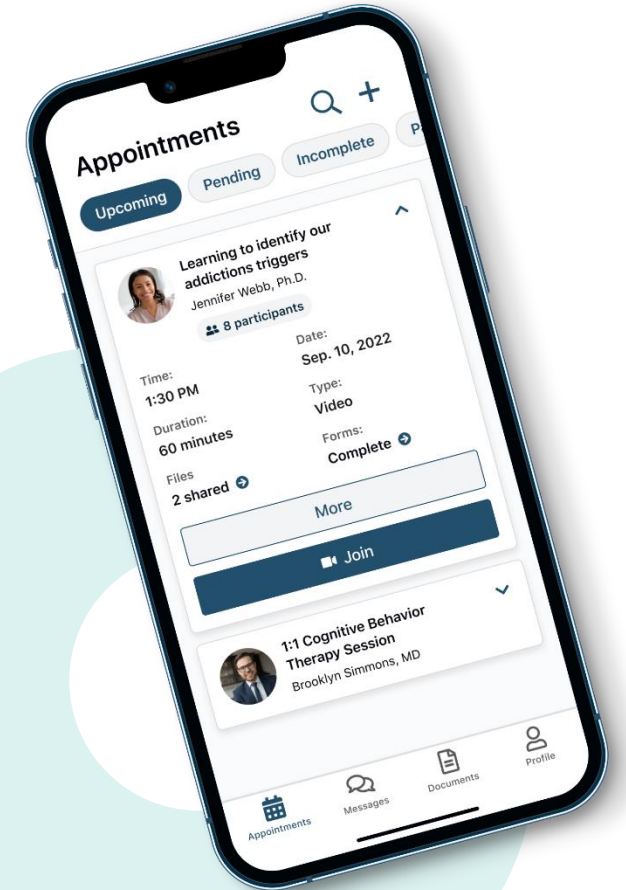


# What does virtual care mean to behavioral health orgs?

Clients deserve to be an active participant in their care journey. They want visibility into their progress and a collaborative role in their care.

Virtual care represents a critical aspect of the modern operations of behavioral health organizations and provides a significant opportunity for behavioral health orgs to **eliminate the barriers of distance and time between their providers and clients.**

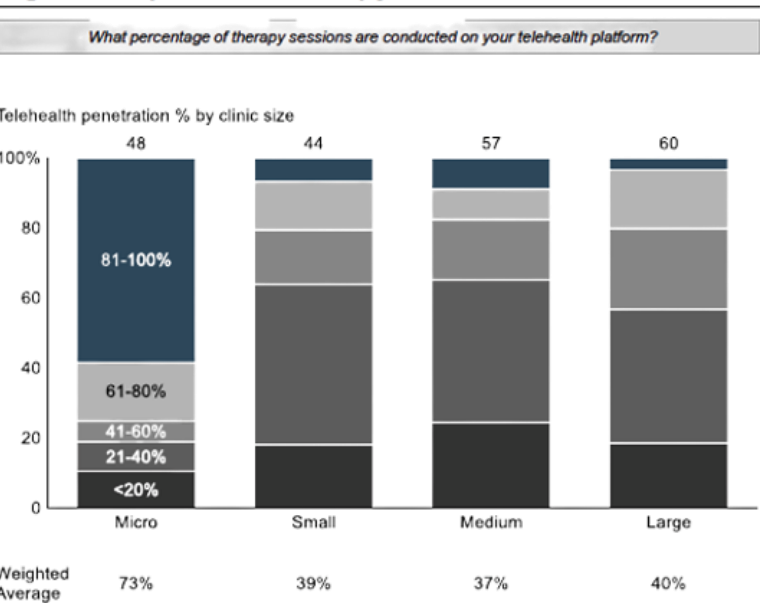
Behavioral health organizations have better patient engagement when they provide a modern patient experience.



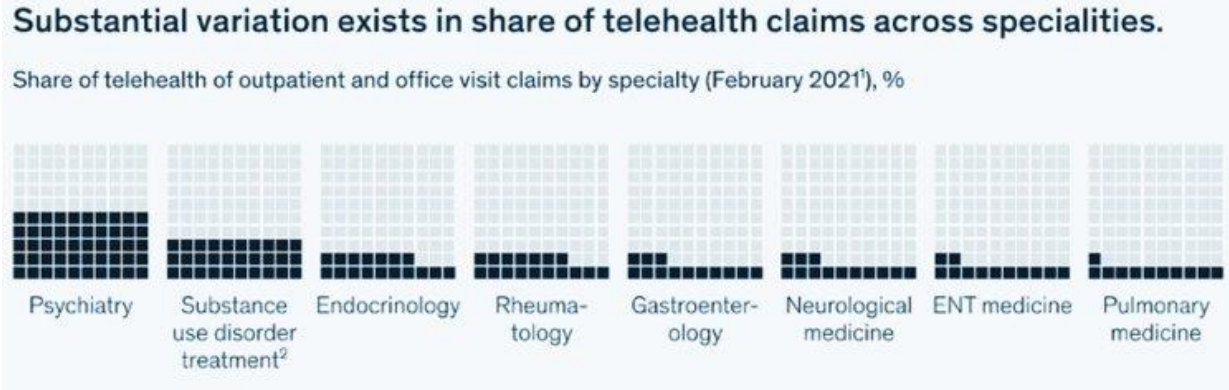
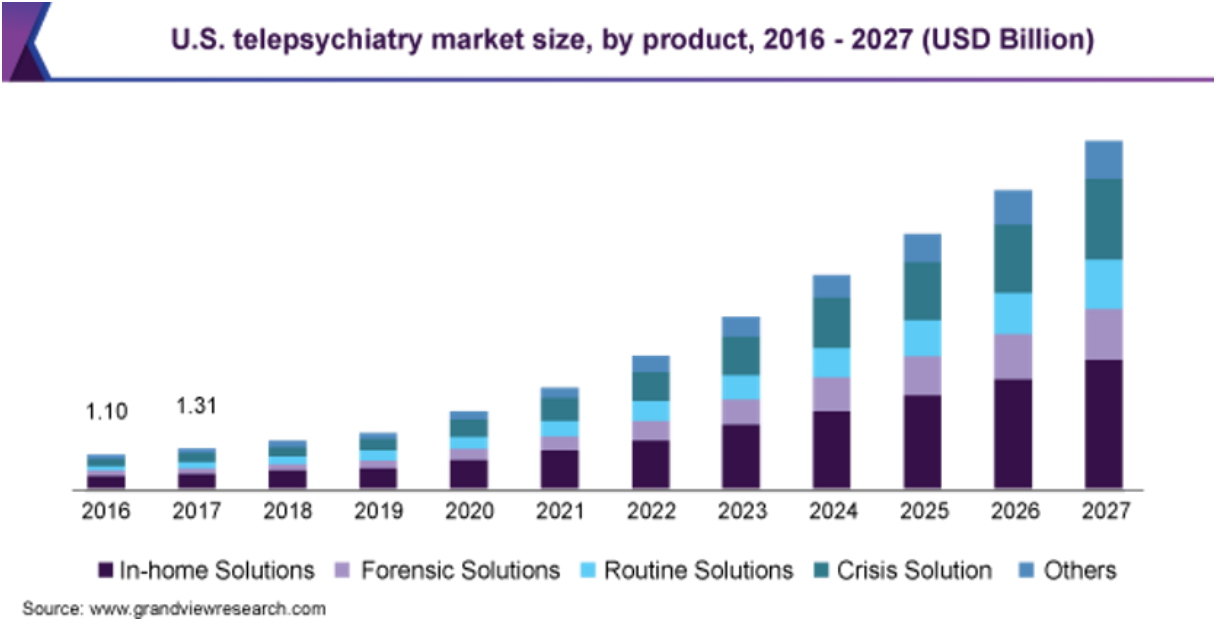


# Virtual Care is a Major Growth Driver in Behavioral Health

Across organization sizes, telehealth account for a significant portion of therapy sessions



Source: Private Qualifacts' Research

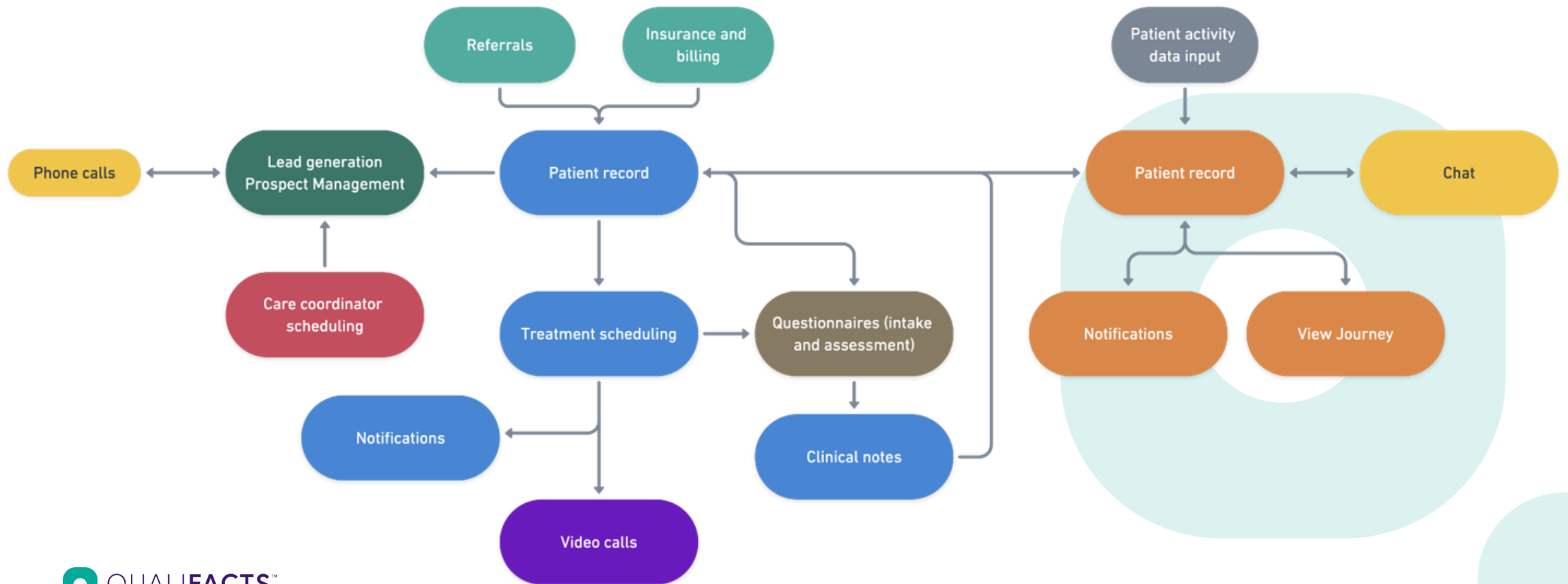


Source: McKinsey



## Problem: Current Enterprise Software Stack

The current behavioral health client engagement software stack is a mix of disconnected, incomplete, and non-vertical specific tools.


















# Problem: Current Enterprise Software Stack

Managing client engagement and telehealth alone involves many repetitive administrative tasks.

## Admin Tasks (Intake)

-  Clinical admin gets all information over the phone (name, demographics, insurance), creates chart, gets insurance information.
-  Clinical admin books labs (inside or outside 60-mile radius).
-  Clinical admin sends paperwork electronically via Alchemer
-  Clinical admin finds a time that an assessor is available
-  Front desk admin books the appointment in CareLogic for the doctor and sends the patient their Google Meet link.
-  Clinical admin sends an email to the patient with Google Meet link
-  Clinical admin monitors if forms have been completed and emails patient if not finished in advance of the appointment.
-  Clinical admin runs an insurance eligibility check
-  Clinical admin uploads completed intake paperwork into CareLogic

## Admin Tasks (Initial Assessment)

-  Assessor and doctor take notes in CareLogic.
-  Assessor creates a treatment plan in CareLogic
-  Front desk admin downloads labs and uploads them into CareLogic
-  Doctor issues a one-week prescription to the patient after the appointment
-  Clinical admin calls the patient the day of the appointment to collect payment card for the appointment

## Admin Tasks (Ongoing Treatment)

-  Clinical admin will select a counselor that is open to seeing new patients
-  Clinical admin calls the patient to determine an appointment time
-  If patient does not answer, the clinical admin will make a note in their chart and keep calling the patient every day until an appointment is scheduled.
-  Clinical admin emails counselor to let them know a new patient has been assigned to them
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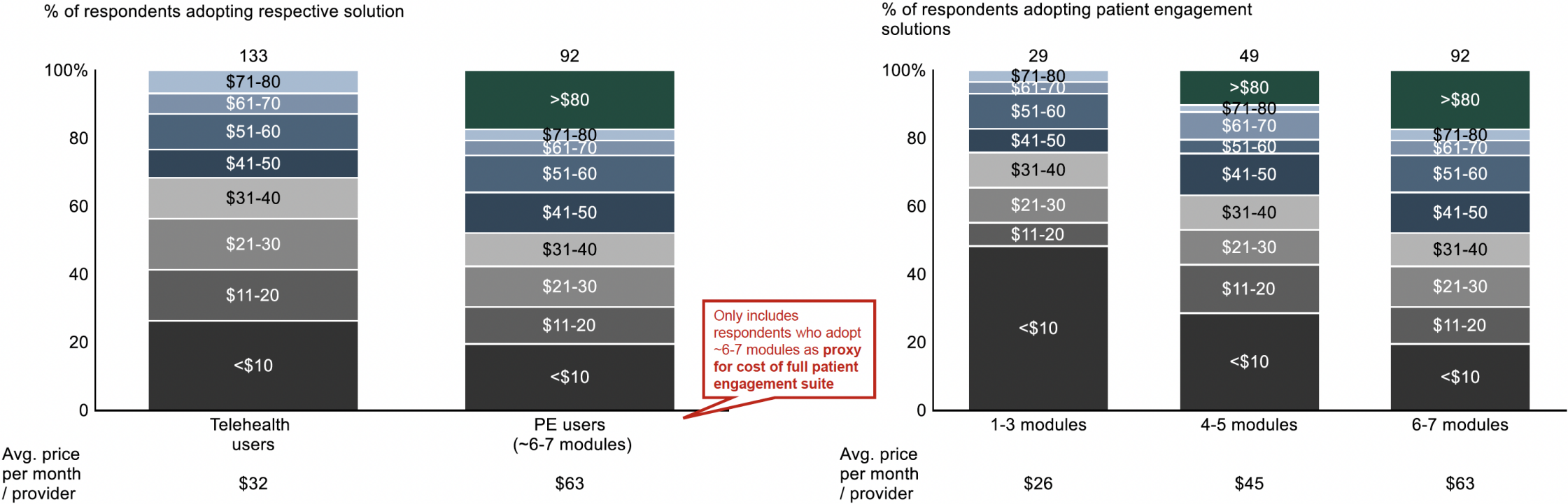


# Problem: Current Enterprise Software Stack

Orgs are solving PE + telehealth needs with 6+ solutions, each with a separate cost.

What is your organization's estimated average monthly cost per provider for **telehealth** solution?  
What is your organization's estimated average monthly cost per provider for **PE** solution?

Please select your organization's software solution for each of the following **PE** modules.  
What is your organization's estimated average monthly cost per provider for **PE** solution?



Source: Private Qualifacts' Research



## Problem: Current enterprise software stack

Orgs are solving PE  
+ telehealth needs  
with 6+ solutions,  
each with a  
separate cost.



Video Conferencing		\$20 - \$30 /pppm
Appt. Reminders		\$28 /pppm
Patient Portal		\$15 - \$50 /pppm
Secure Forms		\$39 - \$129 /pppm
Client Signatures		\$8 - \$15 /pppm
Client Scheduling		\$8 - \$16 /pppm
Other	+ Messaging, Payments, etc	\$10 - \$20 /pppm
		<hr/>
		\$128 - \$288 /pppm



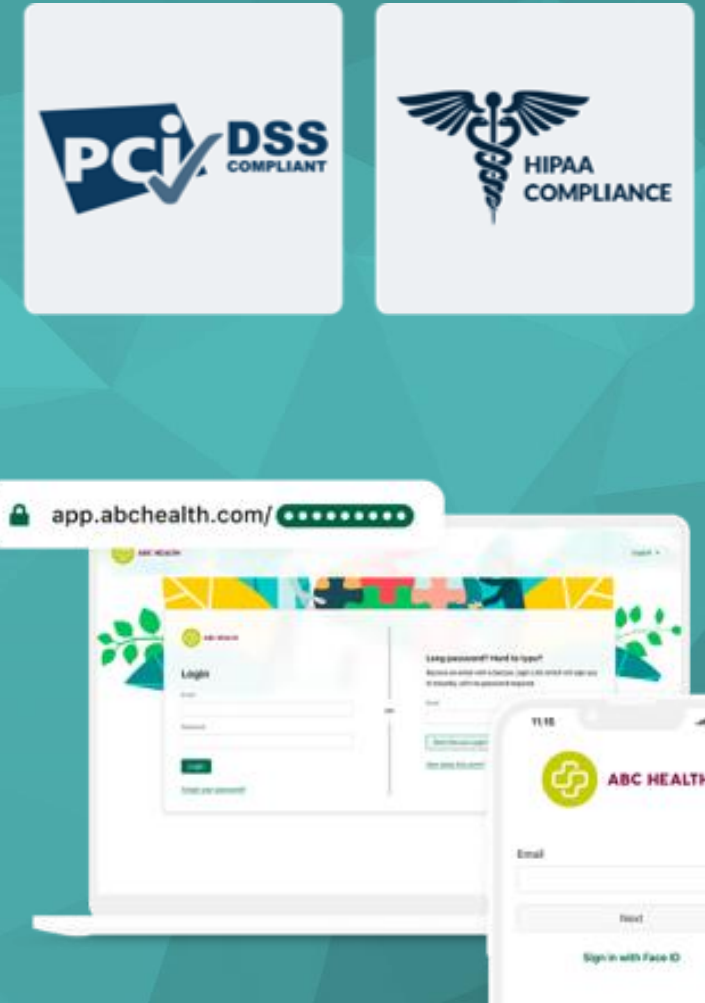
## Other Challenges in Managing Patient Engagement at Scale

**Technology:** Horizontal point products do not cover the vast majority of the virtual care program workflow.

**Security:** The transition from in-person healthcare to a hybrid virtual / in-person or virtual-first model has significant privacy and security implications.

**Support:** Training providers and offering technical support for clients adds significant overhead.

**Brand:** Ensuring brand consistency /control in the client experience across all devices is impossible when the telehealth tools used within a provider network are not standardized.

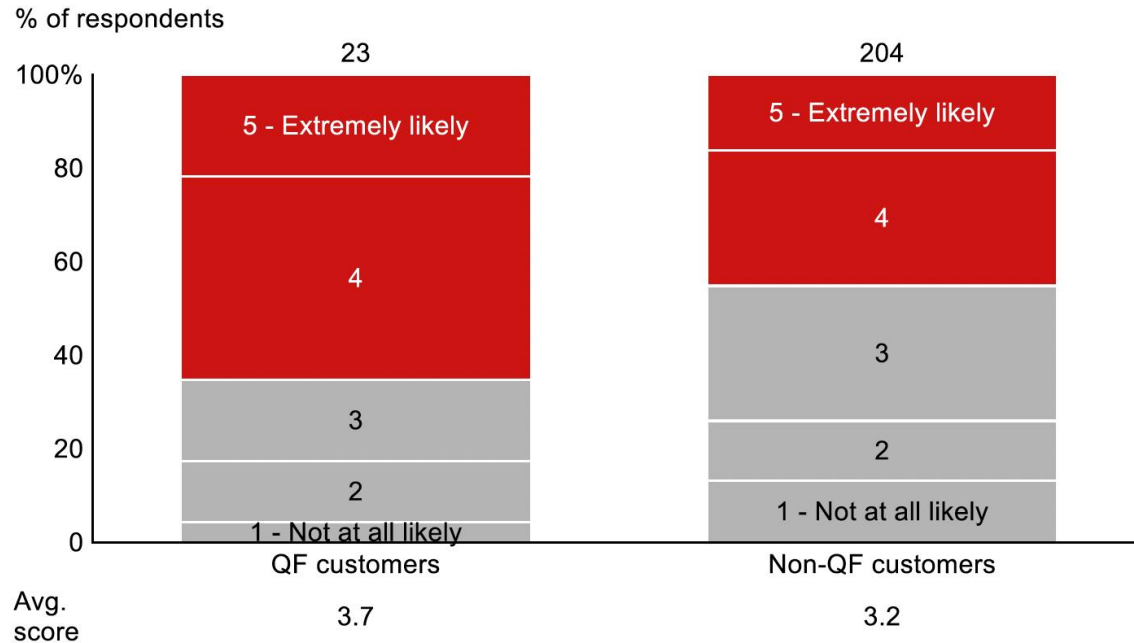




# Market Interest in Integrated EHR + Virtual Care

Most orgs would adopt an integrated telehealth + engagement solution.

*If your EMR / PM vendor introduced a fully integrated telehealth and PE solution, how likely would you be to purchase it in the next 3 years?*

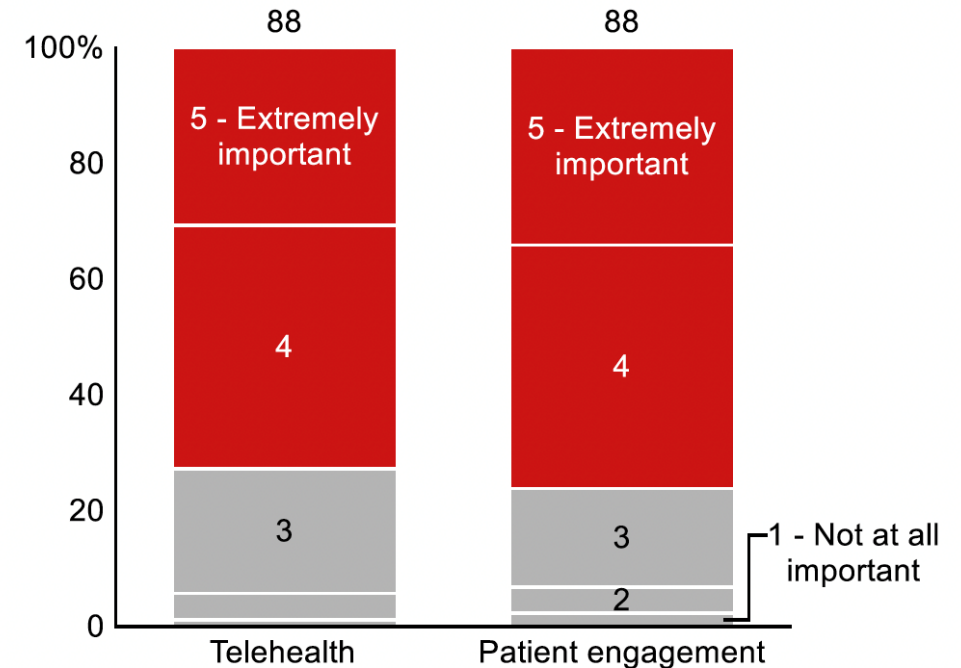


~70% of customers view TH / PE offering as important when selecting an EMR

①

*If you were looking for a new EMR / PM software, how important would it be that the new vendor offer a fully integrated **telehealth** / **patient engagement** offering?*

% of respondents indicating importance of TH solution\*



Source: Private Qualifacts' Research



# Importance of Branding and Building an Online Presence



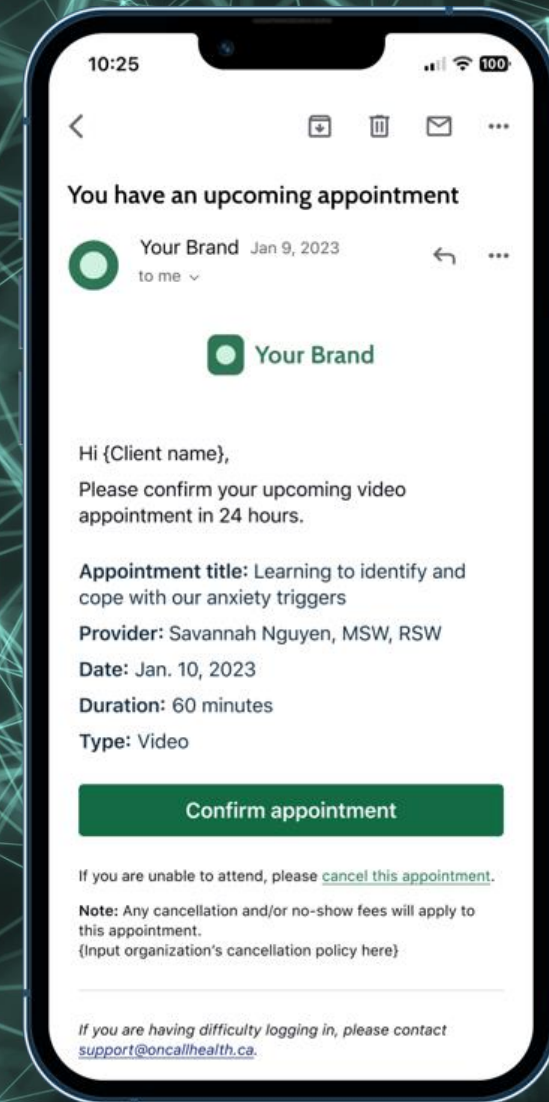
Client trust.



Competition from new direct to consumer virtual care players.



Consumer shift to mobile and online booking as a preference for finding and accessing care.



















# Solution

Leveraging a unified telehealth, engagement, and portal solution significantly reduces operational burden.

## Admin Tasks (Intake)

-  Clinical admin gets all information over the phone (name, demographics, insurance), creates chart, gets insurance information.
-  Clinical admin books labs (inside or outside 60-mile radius).
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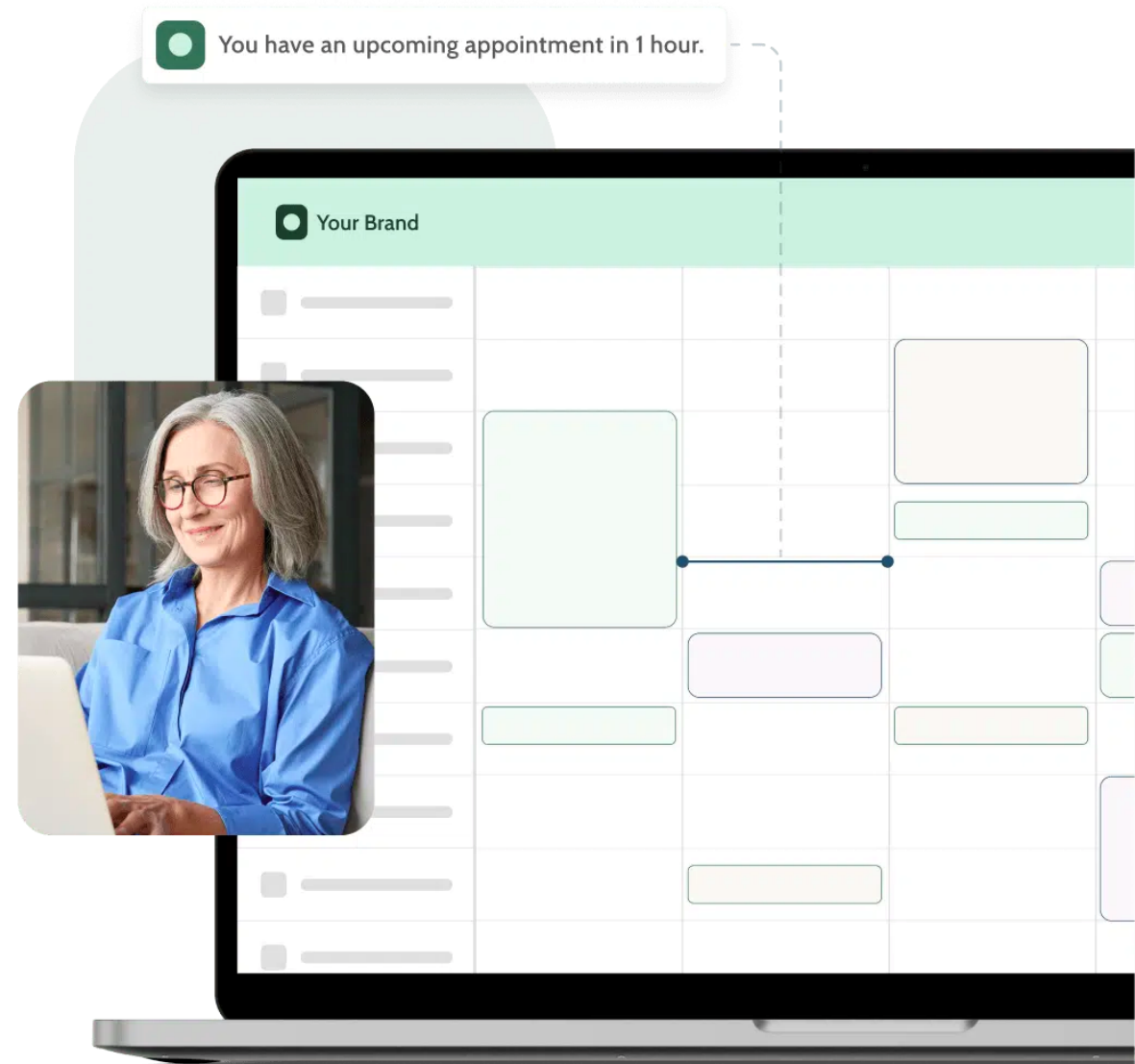
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## Case Study: Large California Behavioral Health Organization

**Consolidated 9 different software solutions by adding an EHR-integrated virtual care solution.**

- Telehealth volume is growing over 200% YoY since launch.
- Provider base has grown 350 to over 400.
- Added 20 new services.







**\$35.99**

Per provider  
per month

## Virtual Care Enables More Effective Billing for No Shows and Late Cancellations

Average revenue recovered  
when using a tool for automatic  
billing for late cancellations/no  
shows (when appropriate).

Source: Oncall Customer Study, 2023





## Other Key Results from Behavioral Health Organizations that Integrated Virtual Care + EHR



Saved **120+** hours per year on patient tech support calls.



Billed over **\$1M** additional revenue in year 1.



Achieved a **95%** virtual outpatient program completion rate in a year.



Increased client enrollment by more than **115%** in the last half of 2021.



Launched over **12** new national virtual treatment programs.



Billed **250%** more than they did before adopting virtual care.



# Why Client Portals are Important for CCBHCs



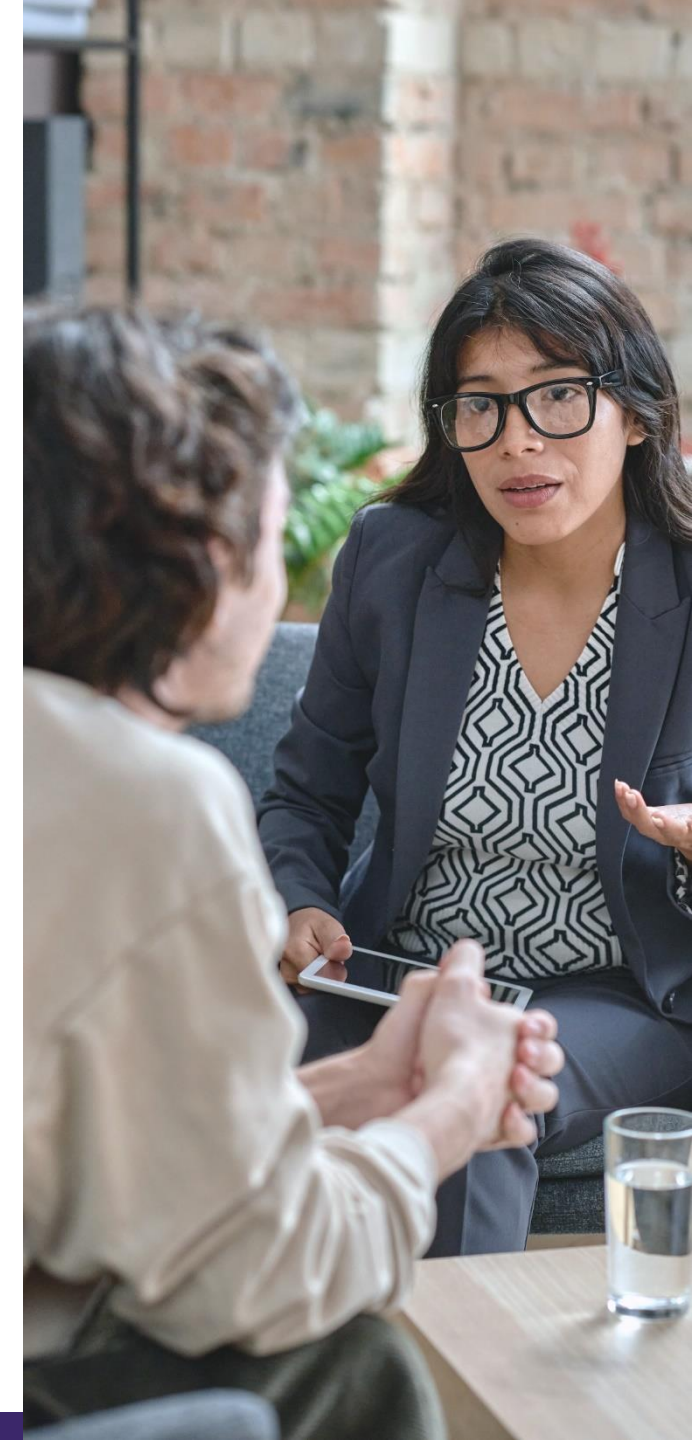
## Access to Care

- Telehealth
- Remote community-based services
- Pre-intake documentation



## Person and Family Centered Services

- A robust patient engagement tool is critical for:
  - Allowing the client to stay informed about his/her healthcare (sharing of progress notes, lab results, treatment plan)
  - Document sharing and exchange (client can send reports from primary care doc to CCBHC, client can self-document things such as vitals or moods and share that documentation)
  - Enabling client to complete self-assessments in privacy through portal (rather than sitting in the agency lobby)





## Takeaways



Many operational challenges stem from the use of point products in virtual care.



Virtual care is a major brand-building opportunity for growing agencies.



Virtual care can create revenue growth opportunities.



All organizations, especially CCBHCs, should consider adopting a client portal that is EHR integrated.



A woman with curly hair is smiling and looking towards the left. She is wearing a white button-down shirt. In the background, other people are partially visible, suggesting a meeting or collaborative work environment. There are teal circles in the top left corner.

# Thank You & Questions

[info@qualifacts.com](mailto:info@qualifacts.com)



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# Building A Digital Transformation Roadmap – Aligning Technology, Team, & Processes For Superior Consumer Experience & Engagement: The 2023 *OPEN MINDS* Seminar



LMCP Program

September 19, 2023 | 1:30 pm – 4:30 pm ET



**Paul M. Duck**  
Chief Strategy Officer  
*OPEN MINDS*



**Carol Clayton, Ph.D.**  
Senior Association  
*OPEN MINDS*



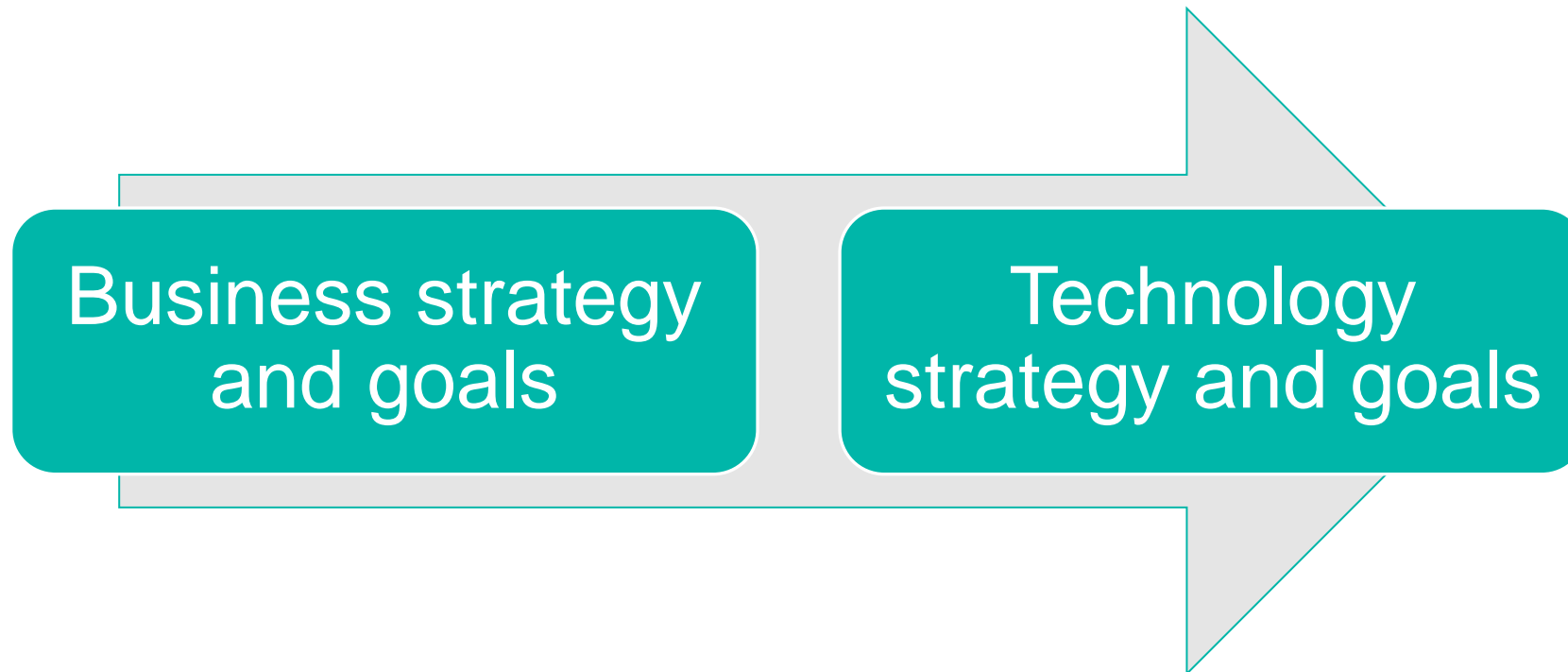


## VI. Digital First Road Map



# Technology Alignment Is Critical To Operational Success

Make sure that your business strategy and goals are aligned with your technology strategy and goals.





# Transitioning From Planning To Doing

Organizational Strategy Plus Vision For IT

Current IT Environment: Gap Analysis & Assessment

Future IT Environment: Scenario Planning: Strategic Objectives  
Relative to Digital First Opportunities to Meet Performance Objectives

Detailed Plan—Prioritizing choices, budgeting and time frames

Implementation



# The *OPEN MINDS* Tech Platform Framework For Community-Based Specialty Provider Organizations

Integrated Data & Analytics For Decision Making

Service Performance Optimization

Competitive Advantage

## Electronic Health Recordkeeping System

- ❑ Interoperable, mobile
- ❑ User optimized
- ❑ Primary care/specialty care/social support integration
- ❑ Consumer assessment data, measurement-based care, decision support

## Hybrid Service Delivery Platform

- ❑ Virtual – telehealth, secure text
- ❑ Home-based – electronic visit verification, route optimization, remote monitoring, smart home
- ❑ Integrated – centralized online scheduling for consumers, online scheduling of team

## Consumer Experience/Engagement Platform

- ❑ Optimized end-to-end virtual consumer experience – website, social media, information, data portal, scheduling, fee schedules, billing, communication
- ❑ App/smartphone connectivity to consumers
- ❑ Consumer decision making support tools

## Value-Based/Risk-Based Reimbursement Platform

- ❑ Value measurement, financial risk management functionality
- ❑ Population health management

## Integrated Human Resources Information System & Financial/General Ledger System

- ❑ Automated end-to-end revenue cycle management
- ❑ Talent credentialing, schedule management



# How to Move Toward Being Digital First:

## *Key Questions Every Organization Needs To Ask*

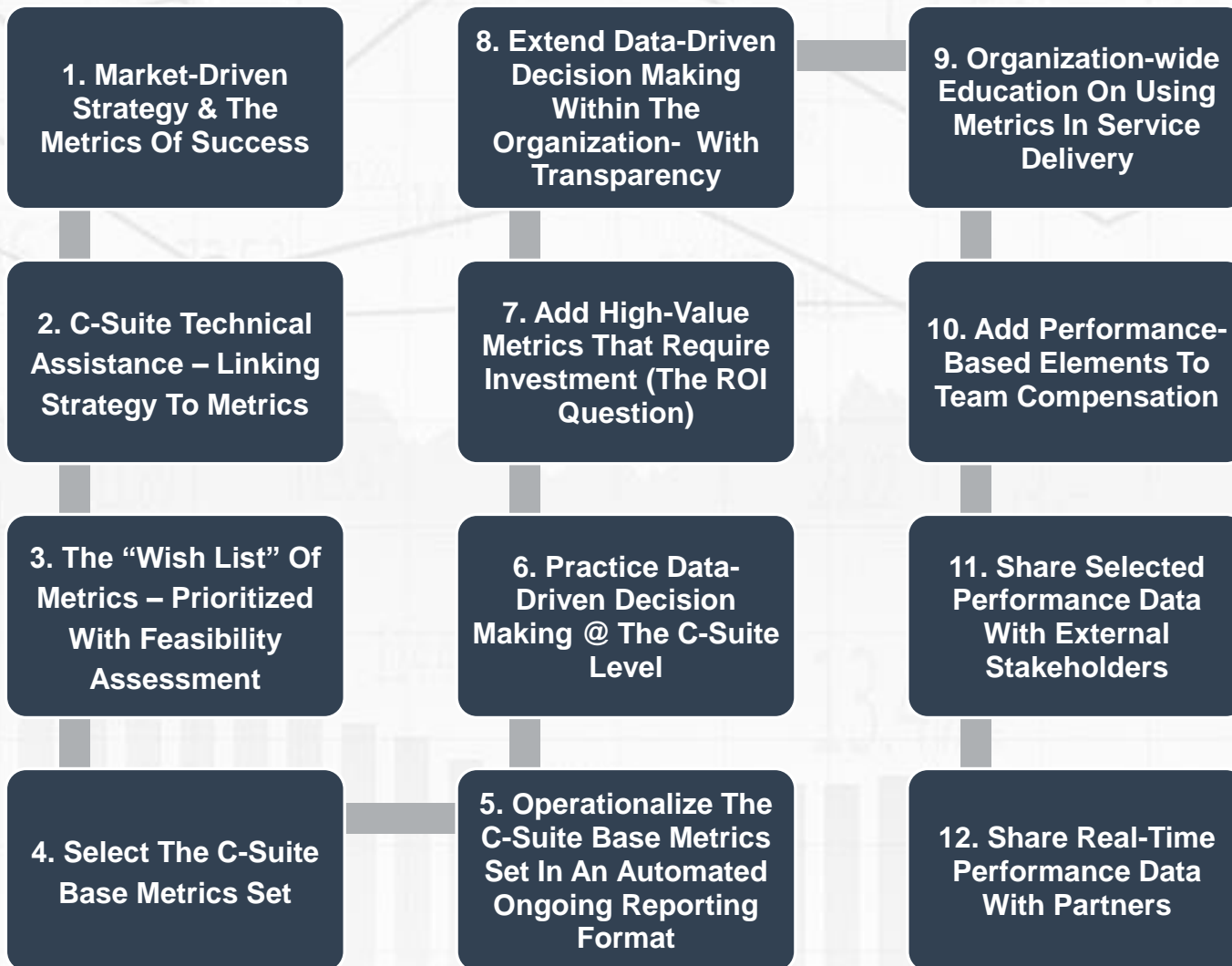
- 
1. What is the problem we need to solve?
  2. Is there a digital first technology that will assist with this problem?
  3. Who will use it? How will it be used?
  4. How does the solution move my strategic goals forward?
  5. What value will be created for the consumer, the user and my organization?
  6. How will you know?

### Quick Guide

- Analyze all Clinical and Administrative Workflows from the Ground Up—How Work is Done
- Prioritize problems based on most inefficient and/or most negative impact on staff morale, biggest gain for key customer (client or staff), cost burden or biggest short-term gain or opportunity
- Evaluate new technologies that can speed efficiency for the priority workflow
- Make Selection based on linkage to overall strategic plan
- Determine ROI over a 5-year period (look for 30% cost savings as benchmark)
- Implement Using *OPEN MINDS* Best Practice Implementation Guide



# The *OPEN MINDS* Framework For Building A Data-Driven Organization



- Advantage goes to the organization with the right data – fast....
- Data reinforces objectives – and promotes order over control
- Data supports communication as creates a common vocabulary and understanding



# So What? Now What?

1. A technology investment should support the overall strategic business plan.
2. A technology investment should be measurable at multiple levels of efficiencies—hard and soft benefits--within an organization.
3. A technology investment should have measurable impacts on patients, clinical and direct care staff, and/or administration.
4. A technology investment should create measurable competitive advantages.
5. A technology investment should act as a catalyst for innovation within your organization.
6. A technology investment should occur year over year for sustainable business growth.
7. A technology investment should be managed via a sound change management and implementation process.



# Thank You





# Our Experienced Team Is Here To Help

We have over 30 years as the industry's trusted source of market and management information for executives of organizations serving consumers with chronic conditions and complex support needs.

*OPEN MINDS* consultants are health and human services experts for organizations serving consumers with the most complex support needs:

- Chronic conditions
- Mental illnesses
- Addictive disorders
- Cognitive disabilities
- Autism
- Dementia
- Alzheimer's



**Contact Us!**



# Our Experienced Team Is Here To Help

*OPEN MINDS* is a full-service firm providing comprehensive business solutions to organizations serving consumers with chronic conditions and/or complex support needs.

- *OPEN MINDS Circle* Market Intelligence Service
- Executive Education & Executive Institute Series
- Management Consulting Practice
- Marketing Agency Services
- Industry Communication Platforms



**Contact Us!**



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# Turning Market Intelligence Into Business Advantage

*OPEN MINDS* market intelligence and technical assistance helps over 550,000+ industry executives tackle business challenges, improve decision-making, and maximize organizational performance every day.



**Paul Duck**  
Chief Strategy Officer  
*OPEN MINDS*

