

Customer experience in healthcare: The moment of truth

Health Research Institute
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Customer experience series

This report is the first in a series of publications that will focus on the customer experience in healthcare.

Healthcare experiences are mirroring that of other industries as consumers and the government demand more value.

Providers and insurers are adopting lessons from industries such as retail, hotel and banking, but they are paving their own way to meet consumer wants and needs.

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Introduction

Remember when you called a travel agent to book a vacation or deposited your weekly paycheck with the teller at the bank? Today three out of four people in the United States go online to plan a trip and 62% prefer to bank online.¹ It was a consumer revolution sparked in part by technological advances that allowed individual customers to take control over how they manage their time and money.

Now the healthcare industry is following suit, redesigning its business models to better capture, serve, and keep a growing class of empowered customers.

In healthcare, the consumerism movement gained traction as individuals were asked to spend more of their own money on services and products such as insurance premiums, deductibles and co-payments. Requirements in the 2010 Affordable Care Act to create state insurance purchasing exchanges opens up competition for membership in the individual and small group markets. And as providers and insurers join together to care for populations in a range of new delivery models, maintaining patient loyalty and engagement will require a more personalized approach.

To gain a better understanding of consumer expectations, PwC analyzed data from its unique Customer Experience Radar, a national survey of 6,000 consumers across nearly a dozen industries. The Health Research Institute (HRI) compared findings across banking, hospitality, airline and retail sectors to experiences and attitudes in the healthcare industry. Separate data for insurers and providers produced more targeted insights.

In many respects consumer expectations in healthcare track closely with other industries. Convenience and speed are high on the list whether purchasing clothing or choosing a doctor. Like the banking and travel industries before them, healthcare companies are recognizing that customer retention comes with repeatable, memorable experiences that match individuals' wants and needs.

But healthcare differs in several important areas. Most notably, the health sector scores significantly lower on customers' willingness to report positive interactions. When it comes to healthcare choices, consumers rely heavily on personal recommendations. In some instances, patients are also less forgiving than a disappointed retail customer. So far, the healthcare industry has adopted basic customer-oriented improvements online such as looking up physicians in a network, checking claims, or making appointments, but it needs to push beyond transactions to actual care delivery. As "patients" behave more like "consumers," healthcare companies need to deliver a higher level of personalized service, satisfaction and overall experience—or risk losing business to the competition.

On a recent swing to an Illinois hospital system, Jim McManus, vice president of finance at St. Joseph's Health system in Southern California, was reminded of the importance of interacting directly with the customer. One patient who gave the hospital low satisfaction scores, particularly on room cleanliness, was contacted to explain why, McManus said. It wasn't that the room was dirty, the patient replied. He wanted the cleaning schedule to mirror a hotel experience—cleaned in one visit versus a parade of people coming in and out cleaning the bathroom on one visit, taking the meal tray away on another and then changing the sheets yet another time. By finding out the reasons behind the poor satisfaction score, the administration gained a better understanding of the nuance behind the patient's definition of "a clean room," McManus explained.

¹ US Travel Association, 2009: <http://www.ustravel.org/news/press-kit/travel-facts-and-statistics>. American Bankers Association Survey, 2011

Drivers of customer experience

A combination of influences shape the healthcare customer experience

Within the healthcare industry, five forces are coming together to create demand for a revamped customer experience. They are:

- 1. Increased cost sharing** such as high-deductible health plans and tiered pricing have prompted consumers to take a more active role in their healthcare decisions. In 2011, 25% of employees contributed one-fourth of the cost of their insurance premiums.² A growing number of employers are shifting costs to workers. This year, 31 percent of employees cover a quarter of premium costs.³ With more “skin in the game,” individuals are demanding more convenience, better information and overall healthcare experiences that mirror those in other areas of their lives.
- 2. The push for value by healthcare purchasers and the government** has driven organizations to compete for members, patients and sales, which has led to a greater focus on quality, cost containment and transparency. For example, the federal government’s Centers for

Medicare and Medicaid Services (CMS) launched a new version of its HospitalCompare website in August 2011 to give consumers a single source for ratings and evaluations of providers and facilities, including new Medicare STAR ratings.⁴

- 3. Heightened desire for “on-demand” healthcare** in the form of telemedicine, mobile health, social media and retail clinics has fueled the move toward healthcare anywhere, anytime. Nearly one in four consumers surveyed by HRI said they had sought treatment at one of the nation’s 1,300 retail clinics in 2011.⁵ Since 2007, the use of retail clinics has gone up 74%, from 9.7% to 23.5%.⁶
- 4. Information access** is closing the gap between patients and healthcare companies. “Meaningful use” of electronic data is also forcing a new look at information flow across the industry. As patients become more discerning, their willingness to trade some privacy for easy access to information is evidence that healthcare cannot stay locked up in an old model where data is only used by select individuals for select purposes.

- 5. Health reform** injects fresh competition for newly insured customers in new care and coverage models. The focus on a more retail-oriented environment where consumers can get clear information on the insurance products they purchase and the providers they choose will take shape in 50 new state exchanges. As insurance becomes standardized, insurers will increasingly compete to differentiate themselves through the customer experience.

Several service industries outside of healthcare are helping shape healthcare consumer experiences and expectations. Advancements such as queue management in the airline industry, the self-service and 24-hour availability in retail banking, and the price and product transparency in the retail industry are still nascent concepts in healthcare but offer clues as to where the industry must go. (See Figure 1.)

² PwC Health and Well-being Touchstone Survey, 2012

³ Ibid

⁴ Centers for Medicare and Medicaid Services: Hospital Compare. <http://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/HospitalQualityInits/HospitalCompare.html>

⁵ Behind the Numbers: Medical Cost Trends for 2013, PwC Health Research Institute, 2012

⁶ Ibid

Figure 1: Health insurers and providers are making strides in basic service transactions but can learn lessons from other industries

How healthcare stacks up to retail, banking, airlines and hotels

	Other industries	Healthcare industry
Retail*	Multi-channel access to purchase and review products (e.g. in-store, web, mobile app)	Broker based purchasing of individual insurance; increasing presence of online individual and group insurance purchasing
	Sophisticated online comparisons of products and clear pricing	Cost estimator tools on CMS, employer and insurer websites to compare health plans and providers
	Robust technology to aid users in product selection (e.g. app that scan a barcode and compares prices, retail product aggregators)	Tools intended for healthcare self-service (e.g. iTriage, WebMD symptom checker, hospital navigation apps)
	Use of analytics to understand consumer preferences, suggest relevant products and create brand loyalty	Analytics mostly focused on operations and financials vs. consumer
Banking	24/7 access to online statements, records; cash withdrawal from ATMs regardless of branch	Limited access to patient records and patient history across systems
	Expanded banking night/weekend hours of some retail branches; convenient location of ATMs in airports, grocery stores, malls	Rise of retail clinics; providers starting to expand hours; insurers opening up retail stores
	Mobile applications allowing payment, fund transfers and deposits	Increasing access to lab and exam information, physician contacts, claims, health and wellness support
Airlines	Online aggregator sites that compare prices, routes, travel time and enable purchases across multiple companies	Emerging presence of comparison, feedback sites and consumer data aggregators (e.g. Cake Health, PatientsLikeMe, HospitalCompare, Angie's List)
	Seamless integration of multiple transit legs; ability for airlines to communicate and rebook between multiple companies	Difficult coordination of care outside of single health system, requiring patients or family members to become coordinator
	Common usage of kiosks at airport for self-service check in	Some presence of kiosks at hospitals for patient check-in
	Mobile boarding passes; notifications of delay via text or email	Some ER and provider clinic wait times posted online; use of appointment reminders via text
Hotels	Storage and access of customer visit history and information in central record	Increased use of electronic patient health records, but patients still fill out multiple forms
	Itemized bill received prior to check-out so charges can be discussed	Billed later; charge type and amount can be difficult to understand
	Loyalty programs to build brand awareness and reward customers for repeat patronage	Health programs and wellness incentives; limited efforts to create brand loyalty and promoters
	Seamless integration of hotel systems so agents can book stays for users across hotel locations	Patient often calls multiple numbers to schedule individual services
	Comprehensive cleaned room in one housekeeping visit	Parts of hospital rooms often cleaned at different times

*Apparel, footwear and consumer electronics

Customer expectations

Comparing customer expectations in health to other industries

Creating a positive customer experience is a complex process that begins with insight into consumers' wants and needs. Gathering individual definitions of good experiences starts the process of that understanding.

Willingness to share experiences:

Consumers are less likely to share good experiences in healthcare—72% of consumers are willing to share a good experience they had with a health insurer, compared to 91% willing to share a good experience at a hotel.⁷ When it comes to actually sharing good experiences, 70% of consumers share in retail, while 54% share in the healthcare provider industry, and 44% share in the health insurance industry (See Figure 2.) Reasons for this difference may include the complexity

and timeliness of healthcare feedback forms and patient satisfaction surveys. Retail industries have adopted more digital and user-friendly channels to generate and capture quick feedback. For example, shoppers may get a receipt with a 20% discount off their next purchase if they take a quick survey online.

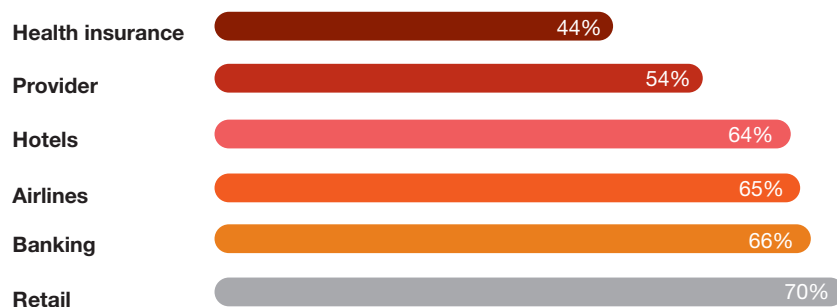
Willingness to share is important from a business perspective because it is related to the wiliness to recommend. Often measured through a customer loyalty index called a net promoter score, this metric is a key indicator of spreading positive experiences and generating brand loyalty in other industries. The net promoter score is rare in healthcare, but it is captured by companies such as insurer Cambia Health Solutions through its network with Regence health plan affiliated companies.

“Healthcare may need a different kind of net promoter score,” said Torben Nielsen, general manager of consumer transparency at Cambia. “The healthy members don’t have high promoter scores because as a nation we’ve historically focused on treating the sick, versus supporting wellness as a preventive approach. We need to find a different metric for this system—perhaps basing it on keeping people healthy and providing guidance for individuals to manage their health journey.”

Noting the importance of opening up online discussion forums to build customer trust, engagement and behavioral changes, Cambia has created member-only online communities where 2.2 million people can discuss health and wellness issues, compare providers and facilities, and interact with clinicians.

Figure 2: Healthcare scores low on consumer willingness to share positive experiences

Percent of consumers who actually share positive experiences within a month of service



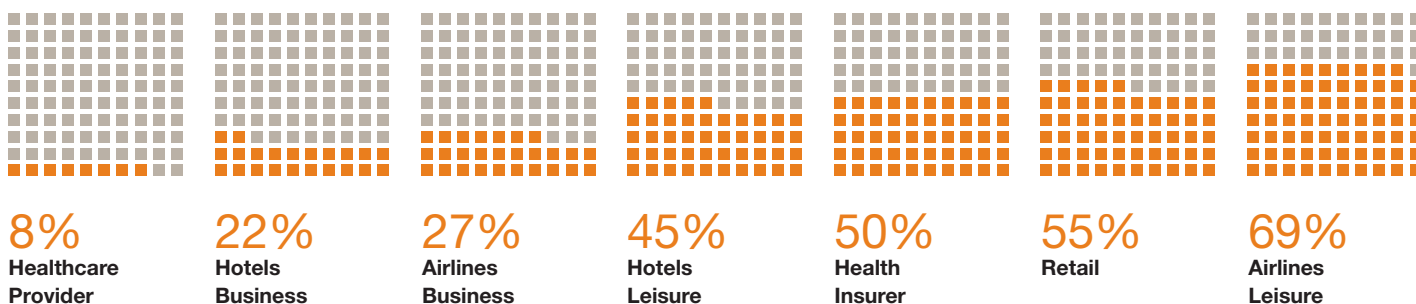
Source: PwC 2011 Customer Experience Radar Research

⁷ PwC 2011 Experience Radar Research

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Figure 3: Consumers least price sensitive when choosing providers

Percent of consumers ranking price as their #1 purchase driver



Source: PwC 2011 Customer Experience Radar Research

Price as purchase driver: In the Experience Radar survey, price was the top influencer in buying for all industries except healthcare provider, where personal experience ranked first for 42% of the consumers surveyed (See Figure 3.) Half of consumers found price important in health insurance purchases but in a separate HRI survey, 37% of respondents with upper incomes ranked benefits as most important when choosing a health plan, while 43% of respondents with lower incomes ranked price as most important.⁸ One reason may be that higher income individuals are not as price sensitive and prefer to focus on benefits. They may also work for large employers that narrow down plan benefits. As state health insurance exchanges come online with standardized health plans, consumers will become more aware of unique factors in plan selection.

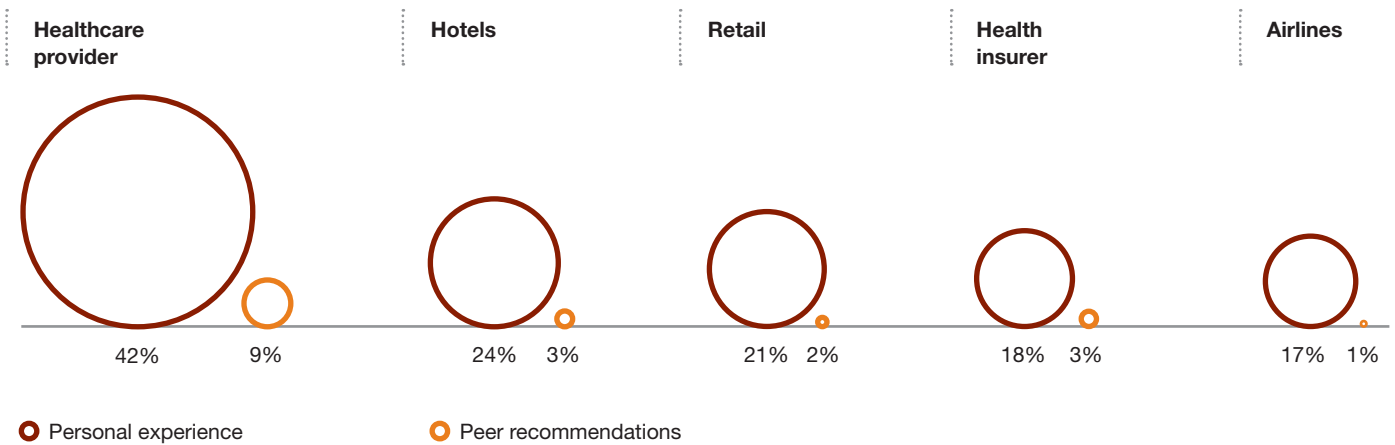
In the leisure airline industry, even though price was shown in the survey to be a top driver of purchase decisions, the experience equation is more intricate. “The notion of customer value also includes the combination of processes, policies, product, and people interaction,” said Dave Ridley, senior vice president and chief marketing officer at Southwest Airlines.” In the airline business, you can consume a perfect product (flying from A to B, on time, with your bags), but in the consumption of that product, if there is a negative interaction between customer and employee, the perfect delivery of the product is destroyed. On the other hand, the injection of the human spirit—a helping hand, a smile, an extra effort, a sympathetic ear—will clean up an imperfect product delivery.”

In the Experience Radar survey, price was the top influencer in buying for all industries except healthcare provider, where personal experience ranked first for 42% of the consumers surveyed.

⁸ Change the channel: Health insurance exchanges expand choice and competition, PwC Health Research Institute, July 2011

Figure 4: Personal experience and peer recommendations matter the most in choosing a doctor or hospital

Influence of personal experiences and peer recommendations in selecting a provider



Source: PwC 2011 Customer Experience Radar Research

Personal experiences and peer networks: Individuals trust their past experience and rely on personal networks to make healthcare decisions, particularly in provider selections. Health insurers and providers need to offer quick and easy feedback channels to capture both positive and negative experiences, act on customer comments, and monitor their online reputation. Personal experience in choosing a doctor or hospital is 2.6 times more important than other industries and peer recommendations are twice as important (See Figure 4.)⁹

Seventy-two percent (72%) of consumers ranked provider reputation and personal experience as the top drivers of provider choice.¹⁰ Getting closer to the customer through social media and online communities facilitates timely feedback and response times. “I can pull up a social media site

and immediately see what patients in our lobby are thinking regarding their care and the experience being rendered,” said Donald Snell, chief operating officer of the Lahey Clinic in Burlington, Massachusetts. “We respond through our social media sites or may dispatch a customer service representative directly to the patient and family member’s location.” Snell also studies summary reports to monitor customer experience trends.

“Personal experience is affected by different factors,” says Kurt D. Newman, MD, President and CEO, Children’s National Medical Center. “We used to have IT Security restrict Facebook access in the hospital in order to increase employee productivity and focus,” Newman told attendees of the Cleveland Clinic’s annual patient experience summit. “However, we talked to our patients and realized they

wanted Facebook to feel connected to their friends and family during their stay. It was a shockingly quick win that left our patients feeling more positive about their experience with us.”¹¹

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⁹ PwC 2011 Experience Radar Research

¹⁰ Ibid

¹¹ Patient Experience Summit, Cleveland Clinic: “CEO Panel.” Kurt D. Newman, MD. May 2012

Individuals also value convenience in a physical setting, with nearly 70% of survey respondents wanting multiple services in one location and nearly 65% value online and mobile information exchange.

Generational differences: In a recent HRI survey, 42% of consumers aged 18-24 said they seek primary health services in non-traditional channels (e.g. retail clinics, phone, web) versus 15% for people over 55.¹² Nearly 90% of 18- to 24-year-olds said they would engage in health activities through social media.¹³ When age is combined with geography, the young and urban respondents value convenience three times more than the rest of the population. Other consumer segments value provider reputation the most.¹⁴

Healthcare organizations such as the Boston Children’s Hospital are responding to the desire for mobile convenience. “We’ve put in a new mobile app called My Way, which allows our patients to request

appointments, request their medical records, and navigate the entire system, both physically and online,” said Sandra Fenwick, president and COO. “We’re trying to be responsive to the same kinds of issues they’re facing outside of health care.”

Convenience and choice: The Experience Radar survey found that 40% of retail consumers value the option to shop across various channels, and customers increasingly use mobile applications at the store. They may test out a product in-store, compare prices online, and then order from a mobile device. Expectations for healthcare are following a similar pattern as 60% of patients seek education about illness and treatment options at the doctor’s office, but may use different avenues

to schedule or consume additional medical services, such as follow-up consultations.

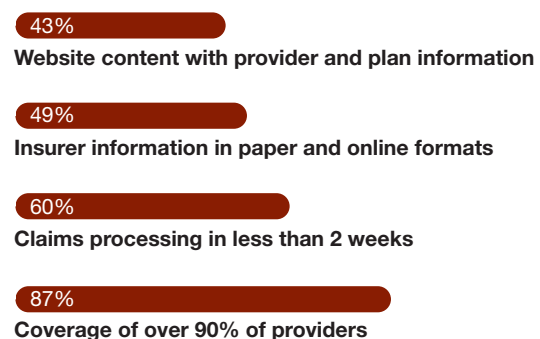
Individuals also value convenience in a physical setting, with nearly 70% of survey respondents wanting multiple services in one location and nearly 65% valuing online and mobile information exchange.¹⁵ Half of consumers value extended clinic hours (Monday to Saturday, 8:00am to 10:00pm).¹⁶ In addition, nearly half of consumers said they want insurer information in paper and online formats. (See Figures 5&6.) Young and urban respondents especially value electronic explanation of benefits and mobile wellness tips.

Figures 5 & 6: Convenience and choice top the list of what consumers value

What consumers value from providers



What consumers value from health insurers



Source: PwC 2011 Customer Experience Radar Research

¹² The new gold rush: Prospectors are hoping to mine opportunities from the health industry. PwC Health Research Institute, May 2011

¹³ Social media “likes” healthcare: From marketing to social business, PwC Health Research Institute, April 2012

¹⁴ PwC 2011 Experience Radar Research

¹⁵ Ibid

¹⁶ Ibid

Staff attitude and moments of truth:

Service industries strive to create positive moments of truth for their customers—critical points where consumers form an impression or make up their mind about future purchases. Moments of truth also can be instances in which consumers change their opinion about the organization. More than half of shoppers in the retail industry cite friendly staff assistance as the key to winning or losing them.¹⁷ About one third of consumers attributed staff attitude to positive moments of truth in several industries, but this attribute was especially strong in the provider industry, at 70% (See Figure 7.)

Similarly, staff attitude defines six out of ten provider healthcare experiences, rendering attitude twice as important in healthcare as in the banking or hospitality industries.¹⁸ Provider empathy matters because of the personal nature of medical visits, where patients often feel more vulnerable.

“Going beyond what is laid out on the script for a transaction request helps us engage our customers in a more holistic conversation,” said Claire Burns, chief customer officer at MetLife. For example, when someone calls in with questions related to a spousal death, the representative verbally recognizes that this is a difficult time and may offer to answer other questions the member has related to insurance or after death planning. The insurance company has begun measuring net promoter scores based on its new broader approach to member services. On the sales side, its scores increased after implementing a welcome call.”

Figure 7: Staff attitude sways consumers' decisions about their providers

Percent of consumers attributing positive moments of truth to friendly staff



Source: PwC 2011 Customer Experience Radar Research

Negative moments of truth can be reversible. Eighty-eight percent of consumers surveyed are willing to return to a retailer that apologizes following a bad experience, and healthcare consumers responded similarly.¹⁹ When interacting with health insurers, two-thirds of dissatisfied individuals became satisfied after their frustration was acknowledged.²⁰ Providers have less leeway—nearly 60% of negative experiences are more likely to be remembered in the provider industry.²¹

Healthcare can learn from the hospitality industry. Hotel staff, for example, learn from the initial days of training that no better chance exists to create positive moments of truth than immediately following a mistake. “There’s a famous saying: ‘None of us remember days, we remember moments,’” said Diane Stover-Hopkins, chief innovation, marketing, and experience officer of Memorial/Beacon Health System in South Bend, Indiana. In its attempt to transform the patient experience, the hospital launched a series of hands-on workshops and

training sessions on empathy for employees at every level. Cafeteria staff learned how to respond to dietary requests while valet staff learned how to greet and send off patients. Every employee who completes the training is given a title of “Chief Moment Officer.” With that training and title, the employees are taught that they are part of a larger mission, with the ability to make or break a patient experience. “We don’t just want satisfied customers. We want raving happy fans,” said Stover-Hopkins.

Experience metrics matter for the bottom line

Customer experience metrics have been gaining visibility in the health industry. For example, hospitals have been publicly reporting their hospital consumer assessment of healthcare providers and systems scores, known as HCAHPS, since 2008.²² CMS continues to implement financial incentives for hospitals that participate in the survey of 10 key measures that include nurse communication, pain control, and room cleanliness. Starting in October 2012, Medicare will reduce base payments for each hospital discharge by 1%, or about \$850 million for fiscal year 2013 as part of its Hospital Value-Based Purchasing program, which uses HCAHPS as a key component to calculate value-based

¹⁷ PwC 2011 Experience Radar Research

¹⁸ Ibid

¹⁹ Ibid

²⁰ Ibid

²¹ Ibid

²² HCAHPS: Hospital Care Quality Information from the Consumer Perspective: <http://www.hcahpsonline.org/home.aspx>

incentive payments. Patient satisfaction scores will determine 30% of the incentive payments, while improved clinical outcomes will determine the remaining 70%.²³

Organizations, including health insurance companies, with leading customer experience index scores have an average of a 23% higher annual return, while organizations ranking lowest on this scale have a negative 46% return, according to Forrester Research.²⁴ When firms move from a below-average customer experience index score to an above-average score, they generate incremental revenue based on customer loyalty ranging from \$31M for retailers to \$1.4B for hotels.²⁵ Forrester also estimates that above average customer experience scores can keep customers from switching health plans and save health insurance companies up to \$4M in revenue.²⁶

Leading organizations are increasingly investing in technology solutions to increase access, transparency, and convenience for customers, instead of merely reducing costs. “It’s much more about offering a frictionless customer experience than purely focusing on

reducing administrative costs,” said Eric Grossman, vice president of enterprise strategy at TriZetto, a healthcare technology company. “In a post reform consumer marketplace, you can’t save your way into a competitive advantage.”

The ability to create an “ideal experience” will hold more weight as insurers move from a business-to-business model of interaction to more individualized, direct consumer contact. Consumers will shop around until they find the healthcare service they want—and they won’t hesitate to switch. More than a third said they would switch providers or health insurers if they were offered their ideal experience (See Figure 8.)

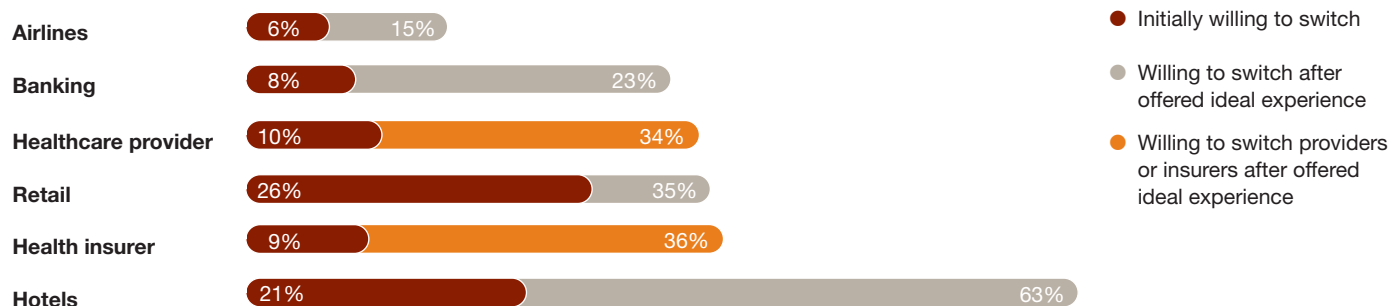
The ideal experience is increasingly being defined by non-clinical elements, such as convenience, amenities, and customer service. Gerard van Grinsven, CEO of Henry Ford West Bloomfield Hospital in Michigan, knows this well, having spent twenty-five years in the hotel business. He brought three principles from his executive role at the Ritz Carlton to the hospital, which was built to run like a luxury hotel: “start with a warm welcome

using your guest’s name when they walk into your house, anticipate the unexpressed wishes of your customers, and give a fond farewell.” One example of his principles in action is a simple instant survey delivered via the TV in a patient’s room during the stay. If the scores are not all 5s (fully satisfied), 20 of his staff are notified via email and within 15 minutes, someone is in the patient room to discuss the issue. Don’t wait until after the visit, van Grinsven warns, because it’s too late to correct a bad experience.

Both in the hospitality and healthcare world, van Grinsven bases hires on candidates who demonstrate compassion. “The culture of caring starts with the leadership,” he said. He and his executive management team call every employee prior to orientation. He believes that happy employees naturally provide quality service, which leads to content customers. Since the opening of the hospital, 85% of patients gave top ratings on satisfaction surveys, putting the facility in the 99th percentile. Henry Ford West Bloomfield Hospital also has one of the lowest readmission rates in the state.

Figure 8: An ideal experience prompts more than one-third of consumers to switch providers or insurance companies

Consumer willingness to switch companies



Source: PwC 2011 Customer Experience Radar Research

²³ Healthcare.Gov: Fact Sheet: “Value Based Purchasing.” April 2011, and Spring 2012 HCAHPS Executive Insight Letter http://www.hcahpsonline.org/executive_insight/

²⁴ Forrester Research Inc, The Customer Experience Index, 2012. January 2012

²⁵ Forrester Research, Inc., The Business Impact of Customer Experience, 2012, March 2012

²⁶ Ibid

What this means for the healthcare industry

Invest in understanding your customers and their preferences

Armed with a clear understanding of patient needs, desires, and cultural attitudes, healthcare companies can design tailored products, services, and education strategies. For example, the young and urban population surveyed are 2.5 times more likely to value health topic information and 1.4 times more likely to value digital wellness tools.²⁷ This group also values wellness programs 35% more than the rest of the population (and every \$1 spent on a corporate wellness program generates \$3.27 in cost savings).²⁸

Focus solutions on transparency, knowledge, and convenience

Build trust by engaging customers on their schedule and through their preferred means of communication. Providers might consider developing mobile check-in, digital appointment reminders, medication reminders, and pricing comparison tools. Wi-Fi in the doctor's office and hospital is becoming more common and can be an easy win. To satisfy consumers' desire for transparency, insurers should consider investing in online tools for individuals to easily compare health plans, benefits, and associated costs and quality measures.

Take advantage of multiple access points to educate and engage consumers

Focus on providing in-person customer support for customers who prefer it and virtual support for others. For example, Highmark Direct, the retail arm of the insurer Highmark in Pennsylvania, has embraced this "anywhere, anytime" mentality by expanding beyond the physical retail space to mobile marketing buses with conference rooms and enrollment kiosks that travel to worksites and communities.²⁹ Enabling customers to seamlessly move between channels without redundant information requests will be a service differentiator for healthcare companies.

Open up forums for customer feedback

Healthcare companies should develop tailored feedback forums that include social media, blogs, video logs, and even text messaging. They should monitor these channels to gather customer insights, focusing on the communities that consumers frequent the most. For example, in HRI's social media week-in-the-life-of analysis, individuals spent 24 times as much time on healthcare consumer community sites than on healthcare company sites.³⁰

Grant employees authority and skills to change the customer experience

Invest in hands-on customer service training, where all patient-facing staff can review performance, talk to patients, and share stories to improve the patient experience. Organizations such as the University of Toledo Medical Center (UTMC) and UCLA Medical Center are examples of health systems using patient-centered training and experience enhancement tools. UTMC created iCare University, which trains all employees and developed new standards for interacting with patients (e.g. focusing with eye contact and dialogue).³¹

UCLA Health System utilizes an evidence-based practice known as CICARE, which stands for Connect with the patient, Introduce yourself/role, Communicate proceedings, Ask permission, Respond with urgency, Exit courteously and explain next steps, creates a standard process for interactions with patients, families and colleagues. All UCLA Health System employees are expected to practice each of the six steps of CICARE with everyone on every encounter. UCLA has developed a variety of tools, including regular management rounds, recognitions and celebrations as well

²⁷ PwC 2011 Experience Radar Research

²⁸ Harvard University Wellness Programs Meta Study, in Health Affairs journal, 2010

²⁹ Kaiser Health News, "Insurers Open Stores to Peddle Health Plans." February 2012, <http://www.kaiserhealthnews.org/Features/Insuring-Your-Health/2012/Health-Insurance-Stores-022812-Michelle-Andrews.aspx>

³⁰ Social media "likes" healthcare: From marketing to social business, PwC Health Research Institute, April 2012

³¹ Patient Experience Summit, Cleveland Clinic: "Strategies to Improve the Patient Experience." Ioan Duca. May 2012. <http://www.clevelandclinic.org/collective/portal2012/pdfs/Morning/1105Duca.pdf>

as service recovery kits, to ensure every patient has a consistent experience in all areas of the health system. This commitment has taken UCLA from the 37th percentile to above the 90th percentile in patient satisfaction.³²

Be proactive and go beyond the transaction

Nearly half of disgruntled consumers surveyed did not receive an apology for their frustration.³³ Training employees to be empathetic and acknowledge difficult situations goes a long way in turning upset customers into happy ones. In fact, two-thirds of customers prefer that their health insurers go above and beyond to follow up.³⁴ Insurers like Florida Blue are proactively engaging the community in screenings, lifestyle programs, prescription comparisons and wellness programs through its 11 retail stores.³⁵

Other insurers like United are also venturing into the retail business with its recent 16,000 square foot store opening in Flushing, NY, where members can interact with health advisors in their native language and print out health information from kiosks and iPads.³⁶

Dedicate leadership to enhance the customer experience

A new set of roles centered on the customer experience has developed in the healthcare industry in recent years— from analysts that look specifically at satisfaction and experience data trends to high-level executives such as chief experience officers who are held accountable for patient satisfaction. (See Emory Clinic example below).

Healthcare companies are finding their own moments of truth where they engage in new thinking about their customers. Whether these moments are prompted by inspiration from other industries, competition, health reform, consumer demands or the bottom line, agile companies are changing the way they get to know their customers, moving beyond basic transactions and embracing their patients and members as consumers and customers. A few foundational strategies and actions can help companies deliver an ideal customer experience.

³² Patient Experience Summit, Cleveland Clinic: “Strategies to Improve the Patient Experience.” Tony Padilla. May 2012. <http://www.clevelandclinic.org/collective/portal2012/pdfs/Morning/1105Padilla.pdf>

³³ PwC 2011 Experience Radar Research

³⁴ Ibid

³⁵ NIHCM Foundation Webinar: Retail Stores and the Shift to a Consumer-Centric Health Marketplace. June 4, 2012

³⁶ Crains New York Business. Barbara Benson, November 2011. http://www.crainsnewyork.com/article/20111102/HEALTH_CARE/111109976

The Emory Clinic and the new customer experience workforce

Leadership at The Emory Clinic in Atlanta has been put a strong emphasis on hiring staff with the right personality. All finalists for front desk customer facing staff are required to interview with the CEO and COO. The Emory Clinic has also created roles dedicated to the patient experience and has seen improvement in patient satisfaction scores. New roles include:

Service ambassador: Designed to assist with proactive service improvements and patient flow; helps greet patients and families, provides directions, answers questions and probes patients and families on their experiences, and engages staff and leadership to identify service opportunities

Data analyst: Monitors and delivers consistent and concise reporting of patient satisfaction data to each department/ physician

Training specialists: Deliver specialized/customized training and coaching for each department (nearly 180 front desk staff and 1,400 care providers) on improving patient comfort and satisfaction

.....
“Our philosophy is to focus our efforts on patients and families who have just an acceptable or average experience, not just those who complain the most. We don’t want to be average. We want to create an ideal patient experience every time.”

— Alan Dubovsky
Assistant Director of Business Services
The Emory Clinic

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About this research

The Health Research Institute used results from PwC's 2012 Experience Radar survey, which measured the experiences and attitudes of 6,000 US consumers across 11 industries. HRI also conducted interviews with executives from across the health industry and other sectors who focus on the consumer experience. To learn more about PwC's 2012 Experience Radar see:

Experience Radar 2012: Consumer insights for the US healthcare payer industry

Experience Radar 2012: Consumer insights for the US healthcare provider industry

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