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Hitchhikers Guide to Managing a Sustainable Patient Mix:

***PRINCIPLES TO TRAVERSING THE POST-COVID LANDSCAPE:*** \_\_\_\_\_  
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The COVID-19 pandemic represents a unique slice of history none of us has experienced before, and likely may never see again. Its widespread impact will likely prove to be an important inflexion point in the practice of medicine for many years to come.


While precise outcomes can't be predicted in times of uncertainty, experience has proven that application of timeless principles creates the environment for better weathering the current storm while incubating creative solutions long-term.

Nowhere is this more clearly needed than in the realm of managing your patient population as patients resume healthcare decisions and office interactions. Moving into a post-COVID world with many unknowns and shifts in patient attitudes complicates the task

of creating a vibrant, growing patient population to solidify your practice future. Patients are as nervous as doctors to return to a healthcare system that will never be the 'normal' they knew before the crisis.

## Timeless Principles

With so many unknowns, we looked for examples of timeless principles, applied in times of crisis and recovery, which made significant long-term impact. Here are four that when applied specifically to ramping up your patient population can help create a bright successful future for you and those you care for.

A man and a woman are sitting together, looking at a tablet held by the man. They are both smiling and appear to be in a clinical or office setting. The background is slightly blurred, showing what might be a patient bed or another person in the distance. The overall color scheme is a cool blue, with a red overlay on the right side containing the text.

# 4 TIMELESS PRINCIPLES *for Optimizing Your* **Patient Population**

Quickly Embrace, then Normalize

Strengthen First, then Grow Strategically

Delight your Visitors

Remain Nimble

# QUICKLY EMBRACE, THEN NORMALIZE

This principle suggests moving quickly to analyze and adopt approaches that will address the most pressing present issues even when initial implementation is imperfect.

The important thing is timeliness and action in moving toward creative, effective solutions.

Marketing and management expert Seth Godin said it this way: “If you set your bar at ‘amazing,’ it’s awfully difficult to start.” The important thing is, do your homework, but get going.

Once initiated, these solutions can be optimized, and when proven, adapted into the normal flow of everyday operations.

## Mainstream Telehealth

As the pandemic rapidly swept the world, forward-thinking practices quickly moved to adopt or fully implement telehealth solutions in order to continue personal interactions with patients. This rapid response, even if under duress, boosted not only immediate responsiveness, but set practices up for expanded patient care options in the longer-term.

## Now Normalize

With the world opening up and practice calendars filling again, it’s time to move to the normalize stage of telehealth implementation. While telehealth visits may taper off, they shouldn’t be viewed as a temporary, stop-gap side-show. These visits must now be folded into the mainstream flow of service delivery that meets patients’ needs as a smooth, seamless, profitable part of ongoing operations.

The key is to bring telehealth into established processes as much as possible to avoid redundancy and manual work, while optimizing those operations that are truly unique. Here are a few important areas to focus on:

### Billing and collections

Co-pays and other fees should be collected at the beginning of a telehealth appointment before the session starts.

Claim initiation should flow directly from your EHR without intervention for both in-office and telehealth visits.

Credentialing for more/fewer payers may be unique to telehealth.

Billing follow-up process may vary. For example, telehealth patients don’t have the same front desk and exit interaction opportunities for payment discussions.

### Scheduling, onboarding

Schedule visit type and length clearly distinguished for both staff and self-serve online calendaring.

Onboarding process, particularly intake such as signing consents, etc. prior to the initial visit.

Electronic eligibility verification prior to each visit, prior to claims submission.

Automated reminders, including one-click video initiation link.

### Clinical considerations

Acute vs chronic care. Consider the suitability and effectiveness of each type of visit.

Health plans and continuity of care, including health alerts and compliance.

Telehealth visits native to the CRM and patient chart.

Dashboards to show CIE, labs, prescription requests – alerts for out of normal boundary lab results.

## DECISION TIME

If your practice is exiting the pandemic and still unsure whether telehealth is right for you, this is the time to rapidly embrace – or rapidly and deliberately reject – telehealth for your future plans. COVID-19 has shifted patient perceptions, and care delivery will follow, even when the crisis passes. Timeless principle #1 suggests getting started now and optimizing and normalizing as you gain experience with it.



# STRENGTHEN FIRST, THEN GROW STRATEGICALLY

With the doors open again, the next big question is how to ramp patient volume back up. While the majority of patients will likely return, enough question marks remain regarding the post-COVID world that nothing is guaranteed. Besides, forward-thinking practices set their sights on a ‘better than normal’ scenario, not just returning to a new normal that will likely look quite different.

Check out our [Moving to ‘Better than Normal’](#) eBook.

With patients rapidly moving to a patient-consumer mindset, a bit of wisdom from the business world is instructive to manage and grow your patient base. A wealth of research and experience confirms these facts:

Acquiring a new customer can cost five times more than retaining an existing customer.

Increasing customer retention by 5% can increase profits from 25-95%.

The success rate of selling to a customer you already have is 60-70%, while the success rate of selling to a new customer is 5-20%.<sup>2</sup>

While healthcare delivery is never a strictly business transaction, this timeless principle can be extrapolated for practices serving patient-consumers: First, keep and strengthen relationships with patients you already have, then focus on growth that is targeted to attract new patients who you can most capably satisfy at optimized profitability.

## Strengthen the Current Base

The first priority is to increase your focus on retaining and delighting your current patients. Successful practices start with these activities:

**Communications.** Continue a heightened level of communication. Many practices have increased communication and outreach to patients during the crisis. Rather than dropping back to former levels, make frequent and personalized communications to patients a permanent part of your processes. Technology can help in creating automated, personalized emails, reminders, texts and printed communications. Also, many of the digital channels aimed at new patients can help with retention (see Attract Your Audience below).

**Trusted Source.** Provide useful information and education. Patient-consumers are constantly looking for solutions to questions and problems. Become a trusted source of information. Stay current on hot topics of discussion in your patient population and provide timely insight and options.

**Financial Engagement.** Improve financial engagement with current patients. While at times uncomfortable, when implemented well, these conversations go a long way toward improving overall patient satisfaction. For details, see [Patient Financial Engagement](#).

## Targeted New Patient Growth

With the core patient base secure, you can turn your attention to new patient growth. Start by identifying your highest priority ideal patients:

Use analytics to target procedures, demographics, growth and cultural trends (see data-driven practice below).

Match those targets with highest profitability procedures identified previously.

This approach will allow you to offer services and amenities that appeal to the strongest, most current growth trends, and those that are most profitable for the practice.

## Attract your Audience

Now, notch up the marketing machine to attract those specific patients you'd most like to add to your roster. Leading approaches include:

### Online presence

Your website should be informative, useful, give a good brand experience of the practice and doctors. Show staff, events and fun activities, including charity activities. Patients relate to humans being human.

Build a high online reputation score. Automated tools integrated into your practice management help happy patients quickly and easily submit online reviews.

**Workflows.** Tune workflows to accommodate changes in post-COVID patient preferences.

Strengthening the current patient base includes strengthening the profitability of the encounters you provide. Utilize reports and analytics from your practice management and EHR to focus on optimizing key functions such as:

**Procedures analysis.** Identify most profitable procedures and how to maximize patient flow and provider utilization.

**Insurance and billing analysis.** Identify insurance and coding combinations that are optimal and implement processes to optimize them.

**Email addresses.** Collect email address (and cellphone numbers for text messages) for all patients and responsible parties. This is the surest way of enabling both heightened informative communication, and financial and other business-related follow-up. This can be set up as a required field on new patient intake forms.

**Automated Messages.** Reminders for appointments, follow ups, screenings, etc. can dramatically reduce no-shows, increase participation in screenings, and improve continuity of care.

**Targeted communications.** Leading practice management software can create personalized messages for specific targeted subpopulations. Speak to them directly and clearly.

**Referrals.** Start by asking patients for referrals. Consider a bonus or other incentive. Patient satisfaction surveys can also include a request for referrals.

**Newsletters.** This is another great way to maintain top of mind awareness: what new things are you doing? New physicians? New locations? New hours? New technologies? New procedures? New staff?





# DELIGHT YOUR VISITORS

Who doesn't love Disneyland? Young or old, virtually any culture, background, race or creed, visitors to a Disney park come away filled with delight. Why is that experience so different than many other theme parks or forms of entertainment?

Money? Sure. But even more important is what happens behind the scenes that no one sees. Under the streets, behind the walls, in the offices, training rooms and supply chains. It's known as The Disney Way. Walt Disney said it himself, "I dream, I test my dreams against my beliefs, I dare to take risks, and I execute my vision to make those dreams come true."

Imagination and dreams aside, one of the timeless principles in delivering a customer delighting experience has to do with execution: the right combination of employee mindset, skills, and technology systems that enable delivery of a flawless, delightful experience. These same principles can make all the difference in a patient-customer's experience with your office.

Moving into a post-COVID environment will require rethinking and restructuring portions of your staffing and operations. Keep these principles in mind as you update your own unique 'Practice Way' of delivering new levels of positive experience unknown to your patients prior to the shutdown.

## Staffing and Operations

Start by matching highest priority items from Principles #1 and #2 with staffing skills and operating systems required to deliver a high-quality experience. Here are a few 'connect-the-dots' examples:

### Scheduling, Billing and Collections

Telehealth coding/billing expertise, and payment follow-up skills.

Insurance analysis and credentialing skills.

New scheduling protocol training.

Telehealth encounters native to the EHR, flow charges directly to the billing system.

### Communications

Staff skilled and trained on use of automated reminders, and content for patient-facing messages.

Creation of content for website, newsletter, emails and other patient-focused communications.

Managing online reputation interactions with patients.

Financial discussion skills.

Systems support for seamless automated reminders; multi-channel, customized patient messaging.

Simple, automated online reviews management.

### Data and Analytics

Staff skilled in creating customized reporting and data analytics; skills and training

in analyzing procedures, reimbursement and profitability (often referred to as a data-driven practice).

Skills in optimizing workflows, streamlining manual processes, decreasing redundancies, improving accuracy.

Unified data system capable of seamlessly drawing data from all aspects of the practice including practice management, EHR, billing and patient portal.

Easy-to-create customized reports.

Integrated data analytics engine.

## In-house or Outsource

The final decision in this process is whether to acquire, train and maintain the required talent and systems in-house, or outsource pieces of it to outside experts and services. There is not necessarily a right or wrong approach for every practice.

For example, many practices keep claims and billing in-house, hiring and training their own experts to manage that important function. Others prefer to outsource RCM to a billing service. Your approach will depend on factors such as specialized skills required, and whether your billing system is capable of supporting the level of billing excellence you have defined.

One final comment regarding systems: today's leading practice automation systems are many times more capable than their predecessors of even a few years ago. Core features like unified database, easy-to-use analytics, automated, multi-channel messaging and reminders, and integrated telehealth can tip the scale toward keeping more of your patient-consumer delight infrastructure in-house. While you are upgrading your delivery capability for the post-COVID environment is a great time to reevaluate your current system's ability to keep up.







# REMAIN NIMBLE

The pandemic crisis forced many of us out of our normal, comfortable patterns. In order to weather the storm, we had to get creative and resourceful, flexible and inventive. Nimble. In hindsight, the magnitude of what was accomplished in a few short weeks is quite remarkable.

As we transition through and out of the crisis, Yogi Berra's profoundly simple idea can help us stay on track through the recovery process: "It ain't over till it's over." With the crisis behind, it's easy to put things in the rearview mirror and move on. Some practices will try to forget that it ever happened and get back to 'normal' as fast as possible.

Unfortunately, this typically translates into reverting to processes and habits hardened over many years of doing things the same way. The creativity, flexibility and inventiveness that characterized weathering the shutdown gets swallowed up in the crush of everyday patient load, with the assumption that the crisis is over.

But it's never really over. Crisis, yes. Changes, challenges, surprises, unplanned issues? Not really. Forward thinking practices recognize the pandemic as possibly one of the best-worst things that could happen to them. They take with them the ability to remain creative and resourceful in pursuing new opportunities, to remain flexible and move decisively in the face of challenge and change.

One of the greatest strategic strengths of independent practice is the ability to remain nimble in the face of challenge or opportunity. With low organizational and institutional overhead, you are able to pivot quickly and move to spaces other practices and systems can't go. Use it to your long-term advantage.

Remain nimble. It ain't over till it's over.

# Optimize your own History

Without a doubt we are traversing historic times. We may never again endure anything as globally historic as COVID-19. But history is being made every day in large and small ways. Your history. The history of your practice and your patients. Timeless principles, consistently applied, will help optimize this historic chapter of your practice.

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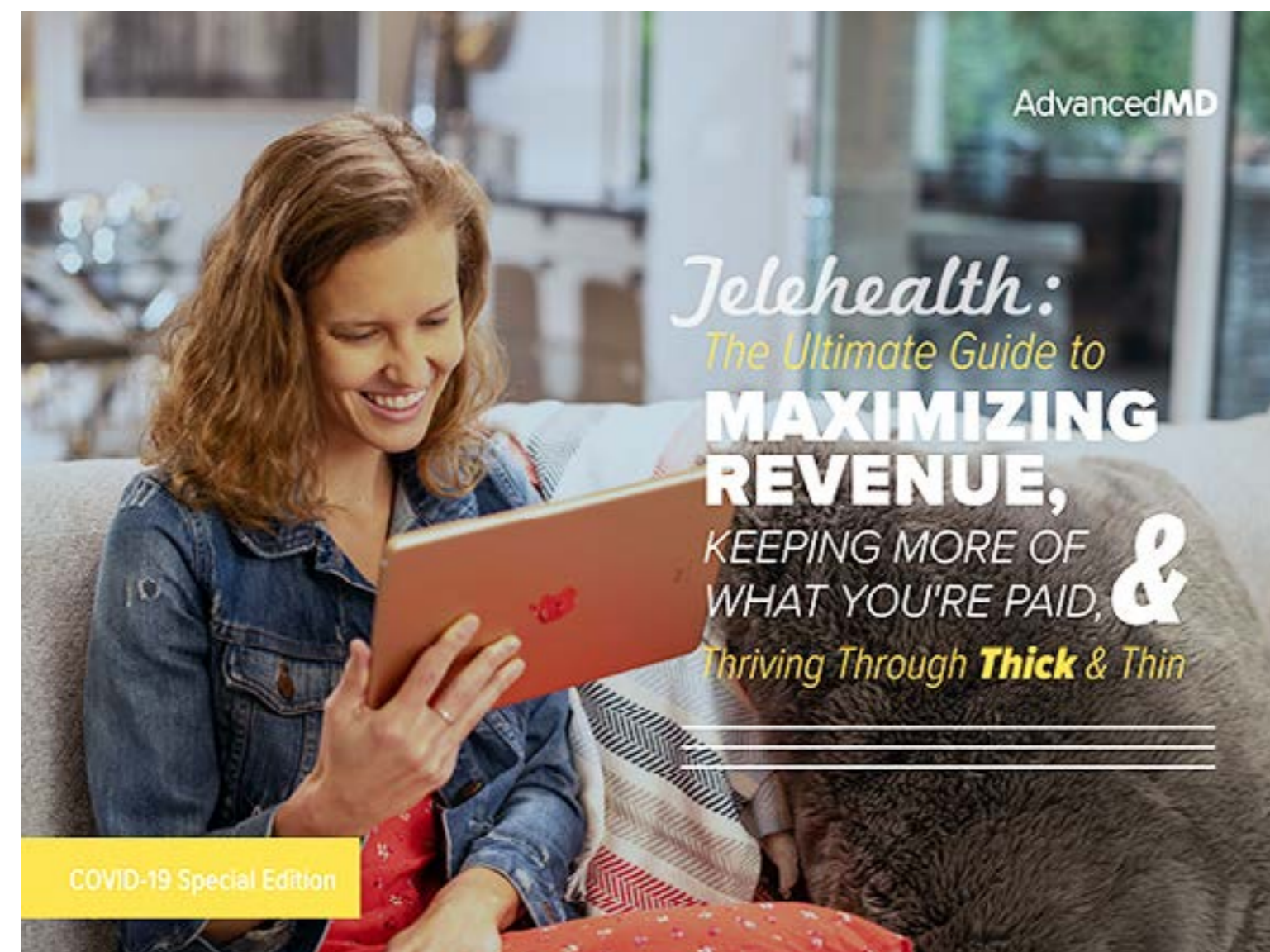
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<sup>1</sup> <https://jamesclear.com/optimal>

<sup>2</sup> <https://www.outboundengine.com/blog/customer-retention-marketing-vs-customer-acquisition-marketing/>

<sup>3</sup> The Disney Way, Harnessing the management secrets of Disney in your company. Bill Capodagli, Lynn Jackson. McGraw Hill, 1998.

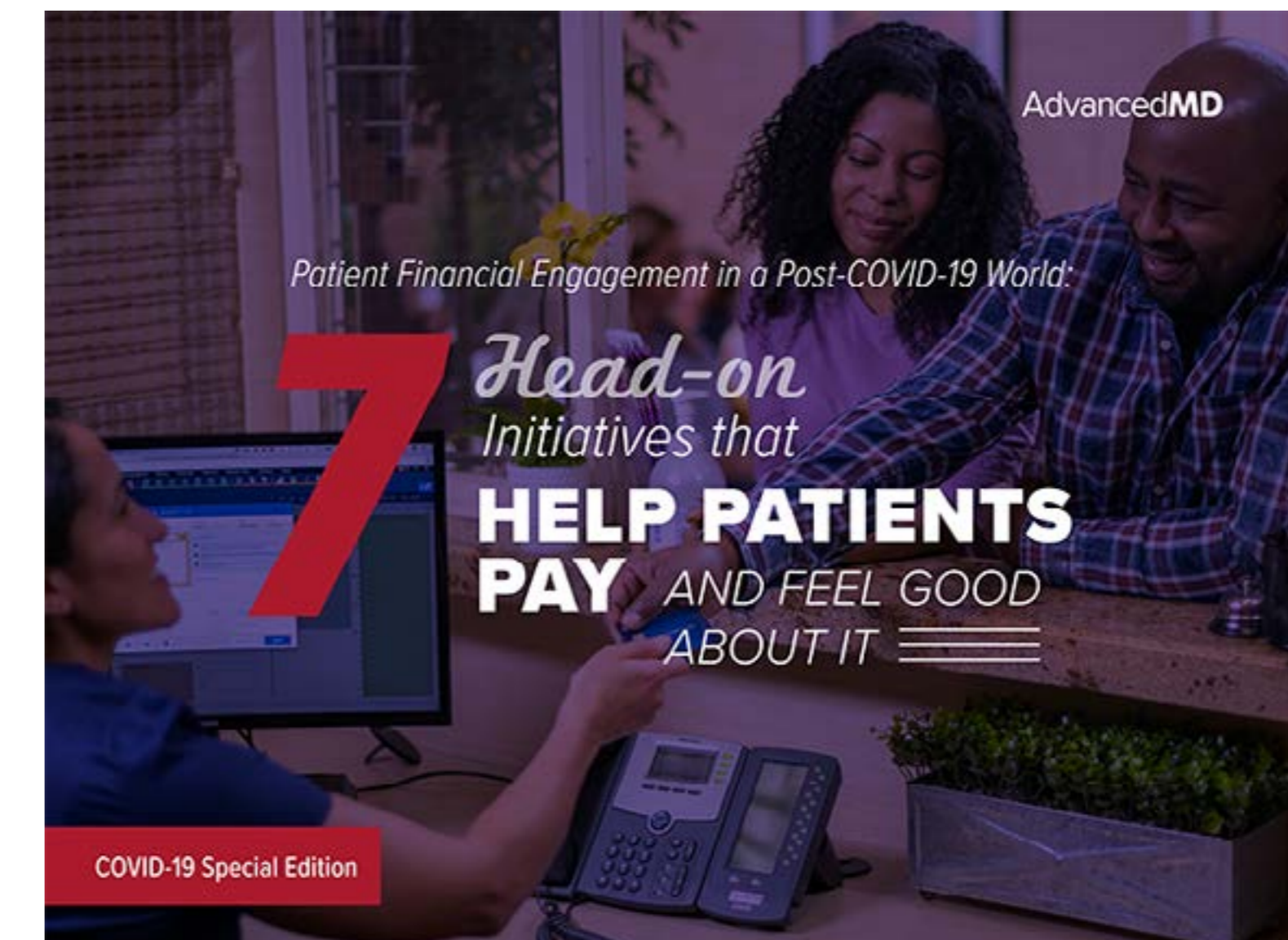
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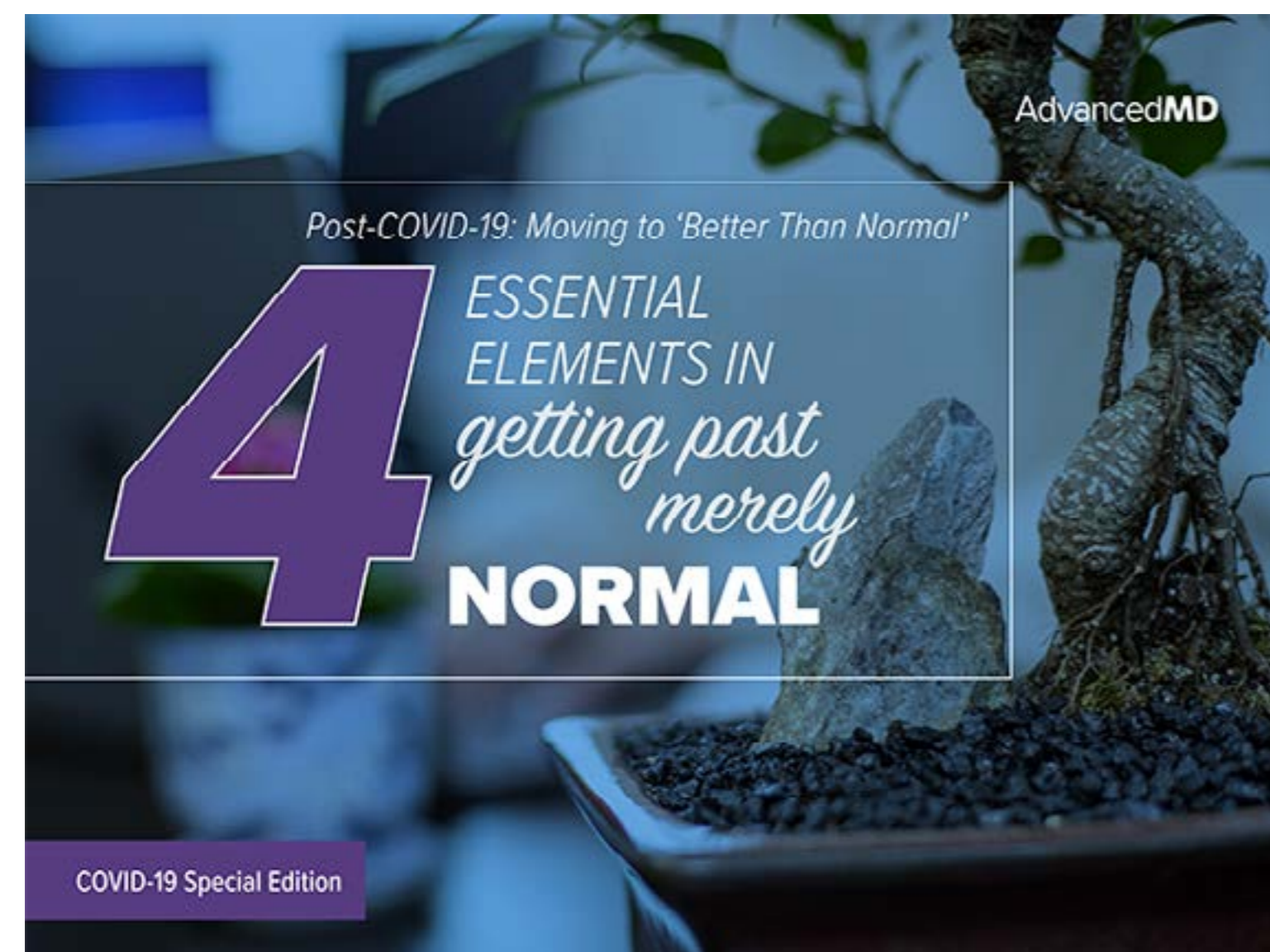
Telehealth Maximizing Revenue Through Thick and Thin



7 Crucial Steps to Reboot Your Practice



Patient Financial Engagement in a Post-COVID-19 World



Post-COVID-19: Moving to 'Better than Normal'



The Human Side of Telehealth

Our exclusive COVID-19 series of eBooks provides a foundation on how to reboot your practice following this crisis. Download these free eBooks to learn more.

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