

# Beyond the EHR

Cultivate patient acquisition  
and retention with an intelligent  
engagement platform



# Introduction

More than a decade after meaningful use incentives were first enacted in 2009, nearly all hospitals and physician practices use electronic health records (EHRs). They are the system of record for clinical care. Gone are illegible, handwritten notes, and prescriptions. Longitudinal patient records, standardized order sets, and real-time clinical decision support result in fewer redundant tests, reduced medical errors, and better outcomes.

In this regard, EHRs have largely delivered on their original promise. But the quest to realize more value from these multi-million dollar systems that took years to implement — sometimes twice — remains.

EHR optimization is still a priority, but the emphasis has shifted to combining EHR data with other high-quality data to advance strategic priorities. Population health; precision medicine; and patient engagement, acquisition, and retention top the list.





## An EHR does what it is designed to do

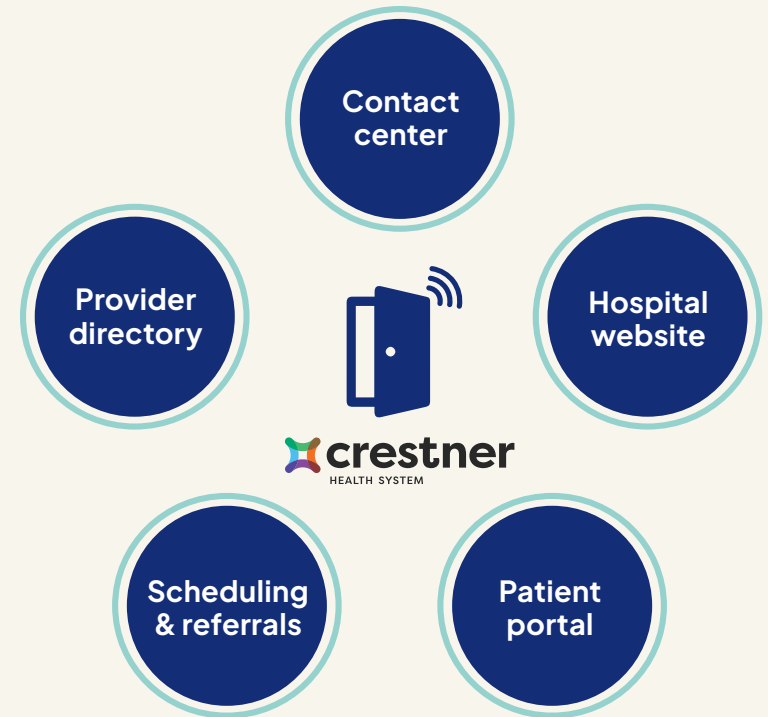
EHRs enable clinicians to securely document, view, and share encounter-based patient health information. Standardized order sets, workflows, and clinical decision support based on health system best practices improve care delivery. More accurate documentation helps optimize coding for billing and reimbursement.

Through tethered patient portals, EHRs also grant patients and their authorized proxies secure access to a subset of their clinical notes, test results, and medication lists, along with provider messaging, bill pay, prescription refill requests, appointment scheduling, and reminders. This is unprecedented access, yet patient adoption was anemic until the portal found its use case as the entry point to telehealth during COVID-19. As healthcare went virtual, registrations spiked.

While high portal adoption is good news, the EHR is a system of clinical record, not a system of engagement. Consumer-centric health systems are enhancing their portals with wellness apps, symptom checkers, and other mobile features to further enhance existing patient engagement — but none of these features drives new patient revenue. What about other facets of the person that guide care decisions?

## Re-thinking the digital front door

Many health systems consider the combination of their websites and patient portals to be the digital front door. If you've consolidated your website properties to enable [dynamic yet consistent experiences](#) and achieved high patient portal adoption, you're off to a good start. But remember, you're being measured against other consumer experiences, not traditional healthcare access. The digital front door is every major virtual touchpoint where patients may engage with you along their journey. In addition to your portal and website, that may include automated contact center communications, a virtual assistant/bot, telemedicine, self-scheduling, self-registration, e-pay, and more.



### Blog

[How to orchestrate a superior digital patient journey](#)

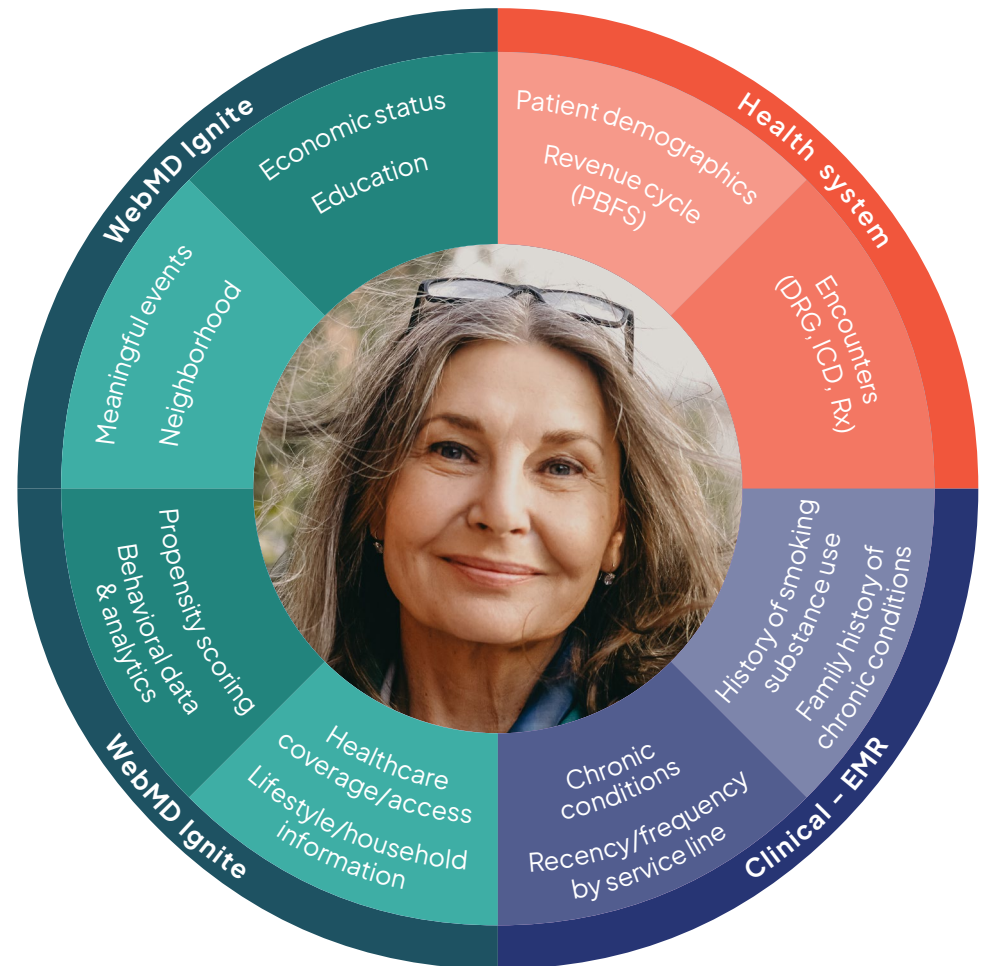
# An EHR provides only a partial view of your patients

Health systems have long been awash in data — revenue cycle data, clinical data, provider data, operational data, and more. With EHRs, the amount of encounter and longitudinal data has grown exponentially. CIOs are under pressure to extract greater value from that data by making it more usable and accessible.

**Clinical profile and encounter history data stored in the EHR is vital to providing direct clinical care, but it’s not the holistic view needed for intelligent engagement — nor should it be.**

For optimal governance and usability, EHR and other health system data must be combined with external data sets and stored in a central repository — ideally a cloud-based data lake — where it is ingested, curated, and enhanced to yield actionable insights. Managing this wealth of data allows health systems to create 360 degree views of patients and consumers that are essential to patient acquisition and retention — programs best run through a CRM — as well as population health management. By overlaying healthcare-specific analytics against this repository, organizations:

- Pinpoint which geographic areas and service lines to focus on
- Identify the attributes and size of target audiences
- Understand care patterns and opportunities for improvement
- Orchestrate the patient journey by removing friction from each touch point



## Population health systems do not engage patients in their care

With the advent of value-based reimbursement, health systems began to realize they needed additional technology to build out population health strategies to earn incentives. Effective population health management relies on coordinated care management, including better patient self-management and medication management.

Often an extension of the EHR, population health systems combine clinical information with limited data on social determinants of health to stratify populations by risk and close gaps in care. They are effective at managing chronically ill and rising risk patients from a clinical perspective, but they aren't systems of engagement. Like EHRs, some systems have cursory outreach functionality, but they can't take the next critical step: engage and nurture patients in ways that motivate them to actively participate in their own care. How can you improve outcomes without engaging patients?

**While 96% of hospitals and nearly 4 in 5 office-based physicians have adopted EHRs, the shift to value-based payments will likely require integration across platforms beyond just the EHR.<sup>1</sup>**



## Boosting population health engagement at scale

Population health management is as much about effective outreach as it is clinical management. It requires a holistic view of patients beyond disease state or risk level to understand what motivates individuals to change behaviors.

Getting patients to adhere to treatment plans requires a continuous flow of personalized content on topics such as goal setting, exercise, and nutrition, presented in ways that resonate. Population health systems can't do this because, like EHRs, they are not systems of engagement. They lack the AI and machine learning to determine the right messages, outreach frequency, channel mix, and touch points most likely to affect desired actions.

These are tactics that marketers use every day. They have the expertise to design effective programs that target specific personas with the right message and the tools to automate complex communication workflows known to boost engagement — at scale.

Population health initiatives typically place the burden on care coordinators to keep patients engaged. Not all of those communications require a care coordinator. A CRM-enabled population health strategy incorporates data-driven engagement tactics, like marketing automation tools that reach large populations with personalized care information. [Outreach from contact center agents](#) equipped with robust profiles of risk-stratified patients also boosts engagement — and maximizes reimbursement. Agents can reach out to schedule screenings, lab work, follow-up appointments, and other services. On inbound calls, after handling the initial request, they can inquire about other population health-related needs, such as offering to register a lifelong smoker in an upcoming cessation seminar.



**These high-touch interactions in between clinical encounters show patients that your health system knows them and cares about their well-being.**

## An EHR doesn't drive patient loyalty

Banks, retailers, and other consumer-oriented organizations have long realized that customer loyalty is due, in large part, to frequent, meaningful engagement. They use hyper-targeted tactics to engage their customers with relevant content that keeps them coming back. By understanding what it takes to maximize customer lifetime value, these companies invest in keeping customers interested, informed, and engaged.

### It's no different in the healthcare sector.

Consumers are only patients 1% of the time,<sup>2</sup> in contrast to the other 99% of our time spent living. Yet clinicians heavily depend upon the information collected in the EHR during those encounters to assess our health status and risks. True, blood work reveals much about our health status, but so do lifestyle, behavior, and socioeconomic status.

To retain patients for life, hospitals and health systems need insights into each patient as an individual, beyond their clinical profile and encounter history. An [intelligent engagement platform](#) provides needed context for the information captured during sometimes infrequent encounters — especially for at-risk individuals who are also healthcare averse. Thanks to data-driven nurturing and personalization, new patients acquired via marketing efforts are 36% more likely to be retained in their first 12 months than all other patients.<sup>3</sup>





## An EHR doesn't drive patient acquisition

Every day, there are millions of potential patients who need a new healthcare provider — and multiple health systems vying to convert them. Most health systems don't have a platform to precision target consumers likely to need care. Moreover, they lack the insights to continually fine-tune smarter acquisition strategies based on what they learn about target markets and preferences. Needless to say, an EHR has no role in patient acquisition.



Unlike other types of customer acquisition, not all consumers who need care are actively shopping for it. Using [propensity models and consumer profiles](#), health systems can accurately identify consumers in their community who are most likely to need high-value services in the next 12 months, while continuing to nurture and engage those who don't yet know they have a need, so they think of you first when they do.

**An intelligent engagement solution is used by hospitals and health systems to create richer engagement and build deeper relationships with current and prospective patients.**



## Intelligent engagement beyond the EHR

Using CRM, predictive modeling, audience segmentation, personalized messaging, and marketing automation, health systems can motivate consumers and patients to become partners in managing their health—at scale. Only two steps in this patient journey are visible in the EHR.

- 1 | Meet Naomi, a 45-year-old single mom who is pre-diabetic, hypertensive, and 20 pounds overweight. With three children and a full-time job, she has trouble managing her diet and exercise.
- 2 | Once a year she sees Dr. Jones, a primary care physician employed by Crestner Health. 
- 3 | Crestner recently entered a VBR contract with Naomi's insurance company and is financially at risk for her health outcomes. According to predictive models that combine EHR and CRM data, Naomi looks like other actual patients who have had cardiac events.
- 4 | Crestner invites her to fill out an [online HRA](#), which she completes and submits via a landing page designed for women like herself. Good news! She immediately learns her cardiac risk is medium—but with some motivational coaching, she can lower it even more.
- 5 | Naomi opts into a virtual program that will educate her on the dangers of heart disease and help her make lifestyle changes to manage related conditions. When she does, her PCP is automatically notified.
- 6 | Over the next few weeks, Naomi downloads a Crestner app with healthy, kid-friendly recipes that simplifies shopping and meal planning. Another app offers 10-minute exercise routines tied to achievable goals.
- 7 | After six months, Naomi has achieved many health goals that she just hadn't prioritized. When she checks in with her PCP she has lost 10 pounds, and her blood pressure and HbA1c levels are only slightly elevated. Dr. Jones is pleased with the year-round engagement his patients now receive and the impact on outcomes. 



# Extend the value of your EHR with intelligent engagement

EHRs have delivered on what they are designed to do; they just aren't designed for intelligent engagement. There's more value to be extracted from these clinical systems of record to advance strategic priorities.

As patients continue to take a more consumer-oriented approach to their healthcare, delivering superior outcomes at the point of care is often not enough to drive patient acquisition and retention. An intelligent engagement platform that combines clinical data with other high-quality patient and consumer information enables sustained, relevant engagement that fuels growth, beyond the EHR.

- 1 The Office of the National Coordinator for Health Information Technology (ONC). National Trends in Hospital and Physician Adoption of Electronic Health Records. <https://www.healthit.gov/data/quickstats/national-trends-hospital-and-physician-adoption-electronic-health-records>
- 2 Harvard Business Review. Health Care Systems Need to Better Understand Patients as Consumers. <https://hbr.org/2023/04/health-care-systems-need-to-better-understand-patients-as-consumers>
- 3 Actual customer results and benchmarks based on 30+ years supporting health system clients.



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