How to Measure and Improve Your Patient Attraction and Retention Growth Strategies

Part II: Baptist Health (Jacksonville, FL) Case Study

SHSMD Society for Health Care Strategy & Market Development℠

**Wednesday March 23rd, 2022
1:00pm – 2:00pm ET**

Today's Presenters

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Company **Overview**

HSG builds high-performing physician networks so health systems can address complex changes with confidence.

Headquarters: Louisville, KY

Formed: 1999

Focus: Health Systems and Physician Network Strategy and Execution

Physician Strategy
Driving a common strategic focus with engaged physicians.

Physician Leadership
Identifying and engaging strong physician leaders is integral to the network's development and success.

Performance Improvement
Improving the performance of employed physician networks.

Network Integrity
Leveraging Physician Network Integrity Analytics™ to create and monitor strategies for patient acquisition and retention.

Physician Compensation
Aligning physician compensation with health system and employed network goals.

Baptist Health
Area's Largest, Most Preferred Health System

- Net patient revenue **over $2.4 B; AA Stable** Standard and Poors rating

- **5 hospitals:** Jax five-county Metro (Duval, St. Johns, Clay, Nassau, Baker), **6th hospital** opening late 2022
  - Wolfson Children's Hospital, only freestanding children's hospital between Orlando and Atlanta
  - Baptist Heart Hospital
  - Baptist MD Anderson Cancer Center

- **13,014 employees**: Largest private sector employer in Jacksonville

- **1,658 physicians** on medical staff
  - 493 employed: 163 Primaries, 110 Hospitalists, 207 Specialists, 13 admin

BAPTIST HEALTH

Handouts/White Papers

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WHITE PAPER | HSG

YOUR PRIMARY MEASUREMENT OF PATIENT LOYALTY AND REVENUE GROWTH

Patient Share of Care: Share of Wallet for Healthcare

SEPTEMBER 2021

For handouts of today's presentation as well as a whitepaper on Patient Share of Care, **please leave your information in the Post-Webinar-Survey** at the end of today's presentation.

Additionally, if you missed Part I of this webinar series on March 9th, find the slides and recording of the webinar here. https://hsgadvisors.com/webinars/how-to-measure-and-improve-your-patient-attraction-and-retention-growth-strategies-part-1-shsmd-educational-session/
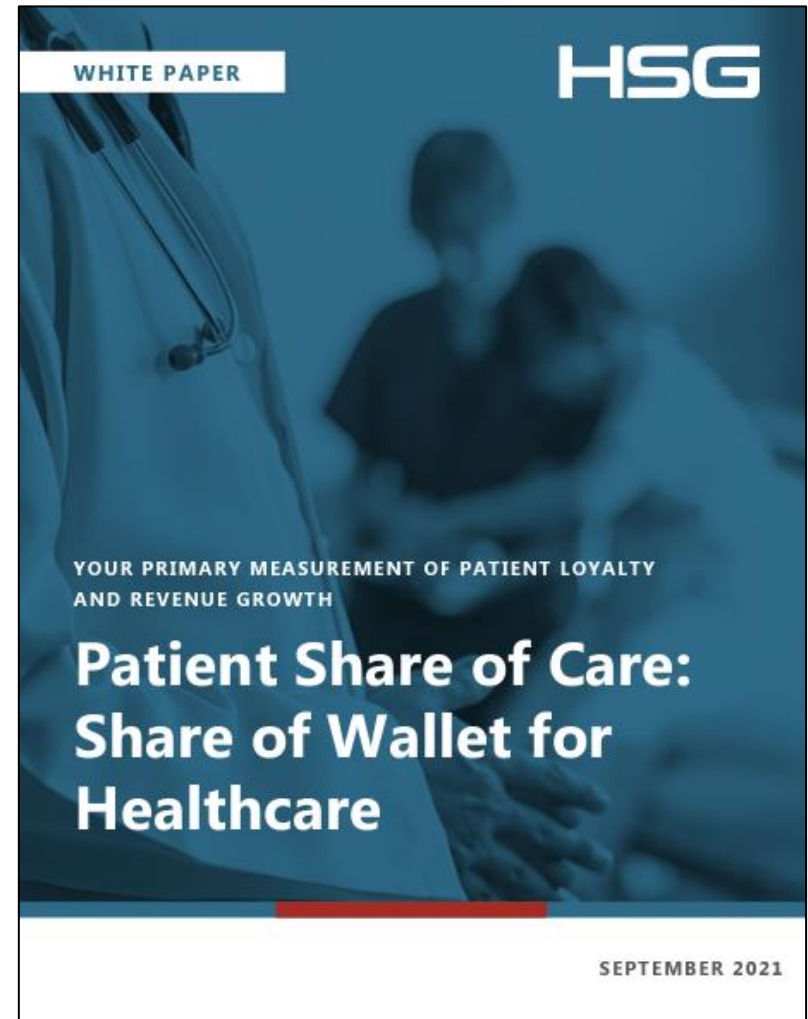
How to Measure and Improve Your Patient Attraction and Retention Growth Strategies

- Growth Strategy Development
- Defining and Measuring the Right Key Performance Indicators (KPIs)
- Management and Communication of KPIs
- Conclusions / Takeaways
- Questions and Answers

Growth Strategy Development

Data Utilization in Growth Strategy Development

37%
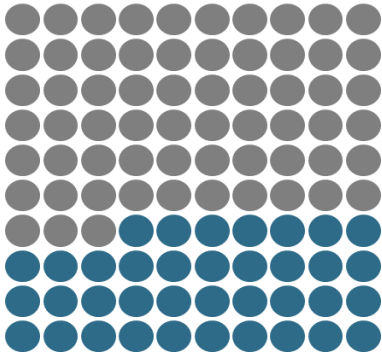
HSG 2021 Survey

37% of health system survey respondents believe they are **not effectively utilizing available data in growth strategy development.**

COMPETING STRATEGIC GROWTH PRIORITIES

FEE FOR VOLUME
Attract more patients

FEE FOR VALUE
Optimize patient retention and care
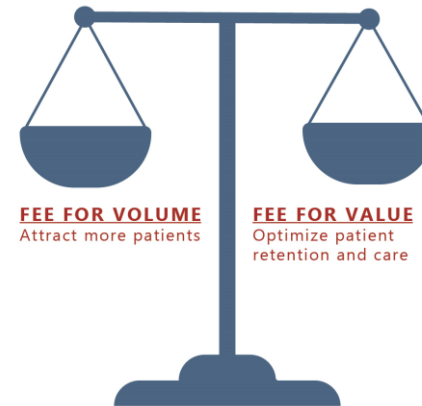
March 9th SHSMD Webinar Poll Results

What KPI does your organization use for it's primary measure of growth strategy success?	On a scale of 1 to 5, how effective are your organizational KPIs for measuring success of growth strategy development? 1 = Not Effective, 5 = Very Effective	Our organization feels we have access to the data and analytics we need to make meaningful strategic growth decisions? Strong Disagree to Strongly Agree
33% = IP Market Share **20% = No Standard Metrics**	Traditional Bell Curve 3% = Very Effective **10% = Not Effective At All** Remainder Falling in the Middle	**70% Strongly Disagree to Neutral** 30% Agree or Strongly Agree

HSG

Patient Attraction Strategies

Patient attraction strategies require data inputs from many sources. Strategies should be **focused on markets, geographies, and service lines** with a goal of capturing more lives.

Referral Source Alignment

Includes Identification of Top Feeders to Core Specialists and Ability to Keep Patients Within Network.

Market Attractiveness

Comparing Median HH Income, Population Growth, Percent Privately Insured, and Socio-Economic Profiles.

Patient Access

Timeliness of New & Established Visits, Travel Time to Primary Care, Specialty Care, and Other Key Access Points.

Provider Need

Determination of Provider Need within Markets Using Actuarial Figures Based on the Health of Specific Populations.

Market Share

Needs to Shift Beyond Traditional IP Market Share and Include Outpatient/Ambulatory and Physician Office Share.

Patient Retention Strategies

Patient retention strategies require data inputs following the patient journey from one site of care to the next and **should differ by the site of service in which patients are entering your system.**

1
PRIMARY CARE PATIENTS

How loyal are our established patients on our primary care provider panels?

2
INPATIENT AND EMERGENCY PATIENTS

Where do our patients receive care after leaving our inpatient facilities?

3
URGENT/IMMEDIATE CARE PATIENTS

What opportunities exist for patient acquisition if this practice is more closely aligned with our system?

Baptist Health (Jacksonville, FL)
"Grow For the Future"

Grow for the Future

Expand our Reach Aligned with Tomorrow's Healthcare Environment

Aspirational destination goal to achieve 34% share of care
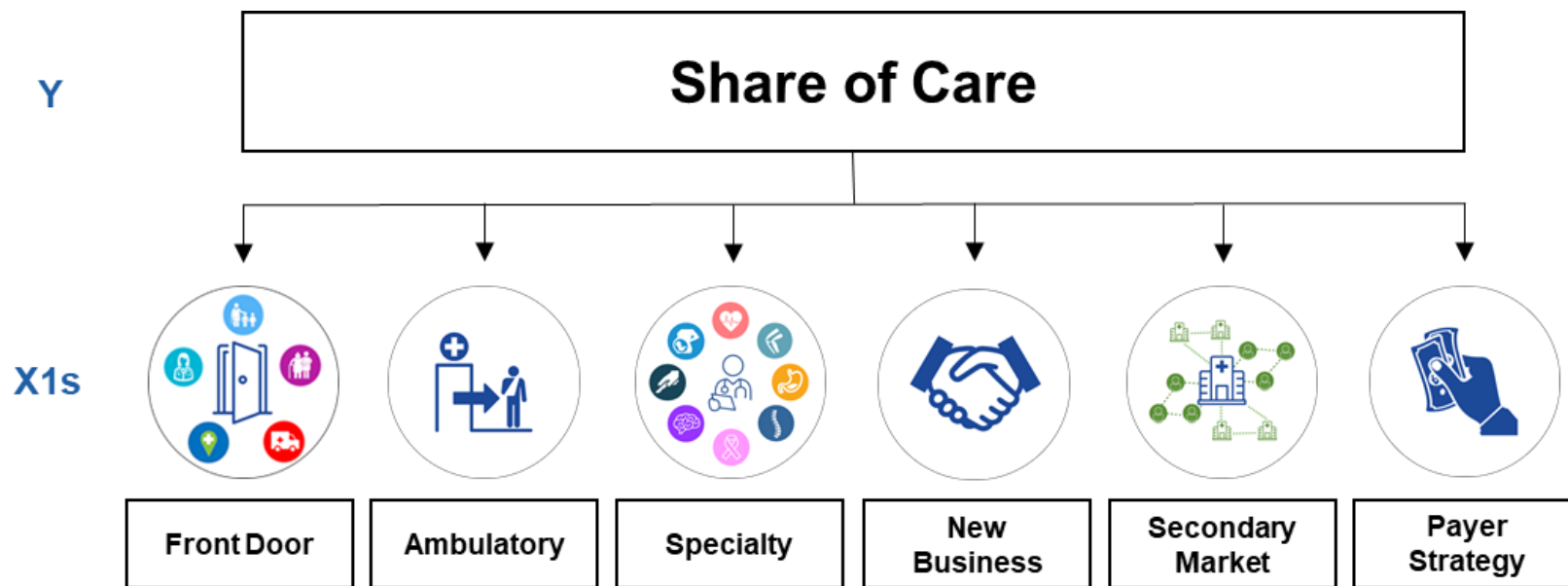
Defining and Measuring the Right KPIs

Common Data Inputs – Part I

Many organizations rely on inadequate data and analyses to infer patient behavior. Utilization of one data source often leads to the fewest gaps in strategy development.

Data Sources	Commentary
Anecdotal Observations	• Personal experiences are critical during drill-down to define root cause but should not be a measurement metric • Only tells us what we "feel" is happening
Inpatient/HOPD Market Data	• Often self-reported to state hospital association • Misses the competitiveness of the ambulatory landscape in each market
Electronic Medical Record	• Typically focused on identifying referrals leaving the network as part of a referral management strategy • Outputs are only as good as the inputted data • Misses any care provided at other facilities
Claims Data	• Can provide holistic portrait of patient care • Detailed data facilitates multiple analytic approaches • Some data redactions due to privacy protection

Baptist Health KPIs
Patient Attraction KPI = "Share of Care"

Akin to Share of Wallet, Patient Share of Care answers the question –
"how much of the total healthcare dollar are we capturing"

Inpatient Discharges

Hospital Locations	IP Discharges
Hospital A	4
Hospital B	4
Other Hospitals	2
Total	**10**

Health System A IP Market Share

- Hospital A (40%)
- Hospital B (40%)
- Other Hospitals (20%)
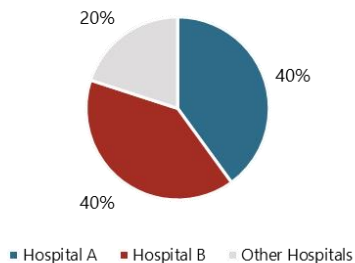
All Healthcare Services

Health System	Healthcare Spend ($)
Health System A	$2,500
Health System B	$750
Other Health Systems	$250
Total	**$3,500**

Health System A Patient Share of Care – Total Healthcare Spend
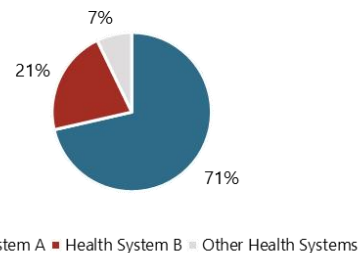
- Health System A (71%)
- Health System B (21%)
- Other Health Systems (7%)

Baptist Health Patient Attraction KPIs:
Market-Based Patient Share of Care - Overall

Health System Share of Care - **Overall**

Health System Share of Care - **By Payer**
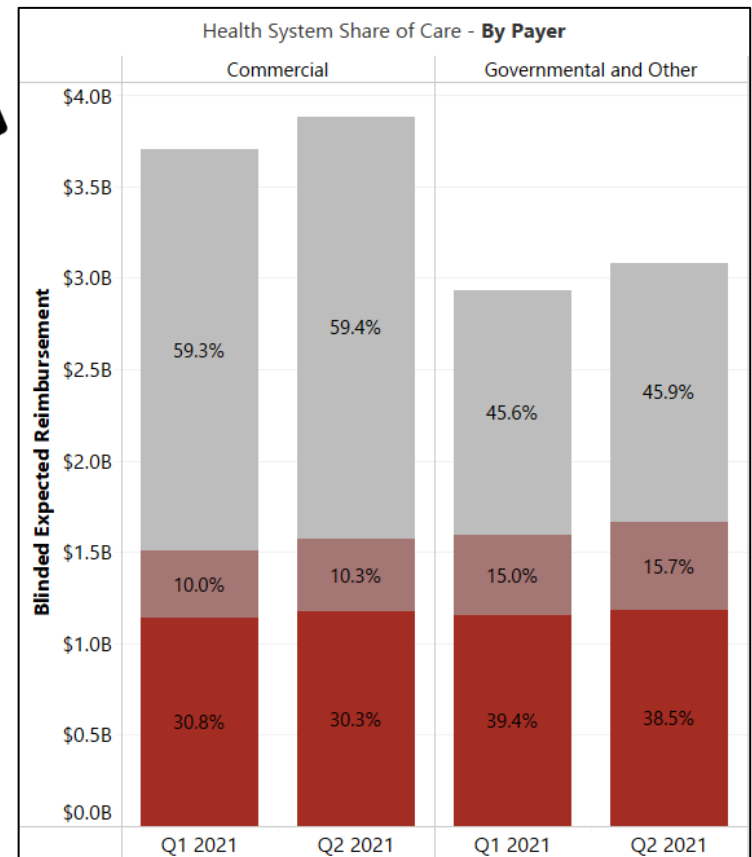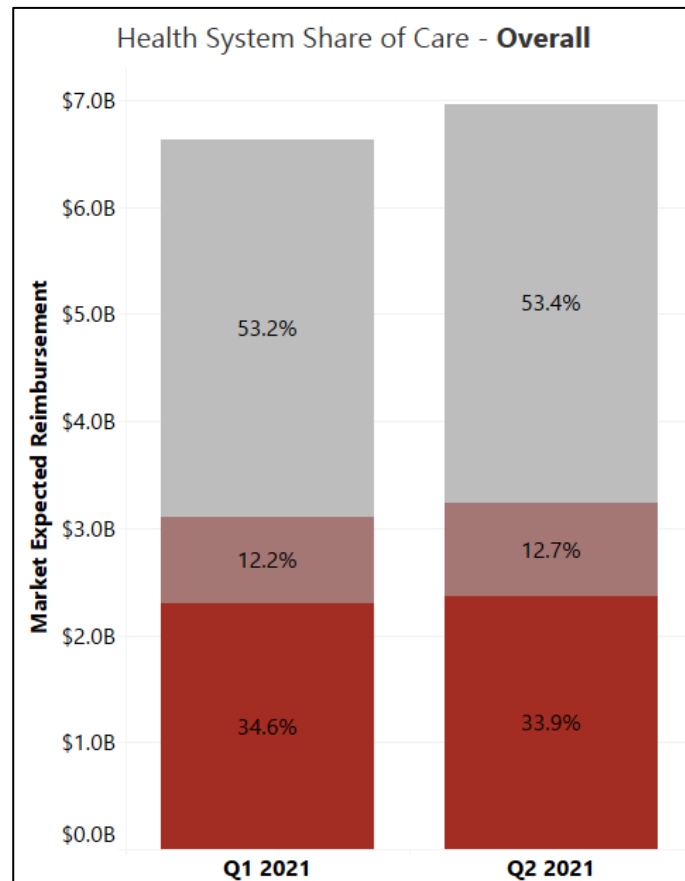
	Q1 2021	Q2 2021
Health System Owned	34.6%	33.9%
Health System Partnerships	12.2%	12.7%
Total Health System Share of Care	**46.8%**	**46.6%**

- BLINDED CLIENT is **capturing 46.8% of the total expected healthcare spend ($6.6B)** for healthcare entities providing services in the service region.
- This ranges from 40% for Commercially Insured patients to 46% for Governmental and Other Payers.

Baptist Health Patient Attraction KPIs:
Market-Based Patient Share of Care – Site of Care
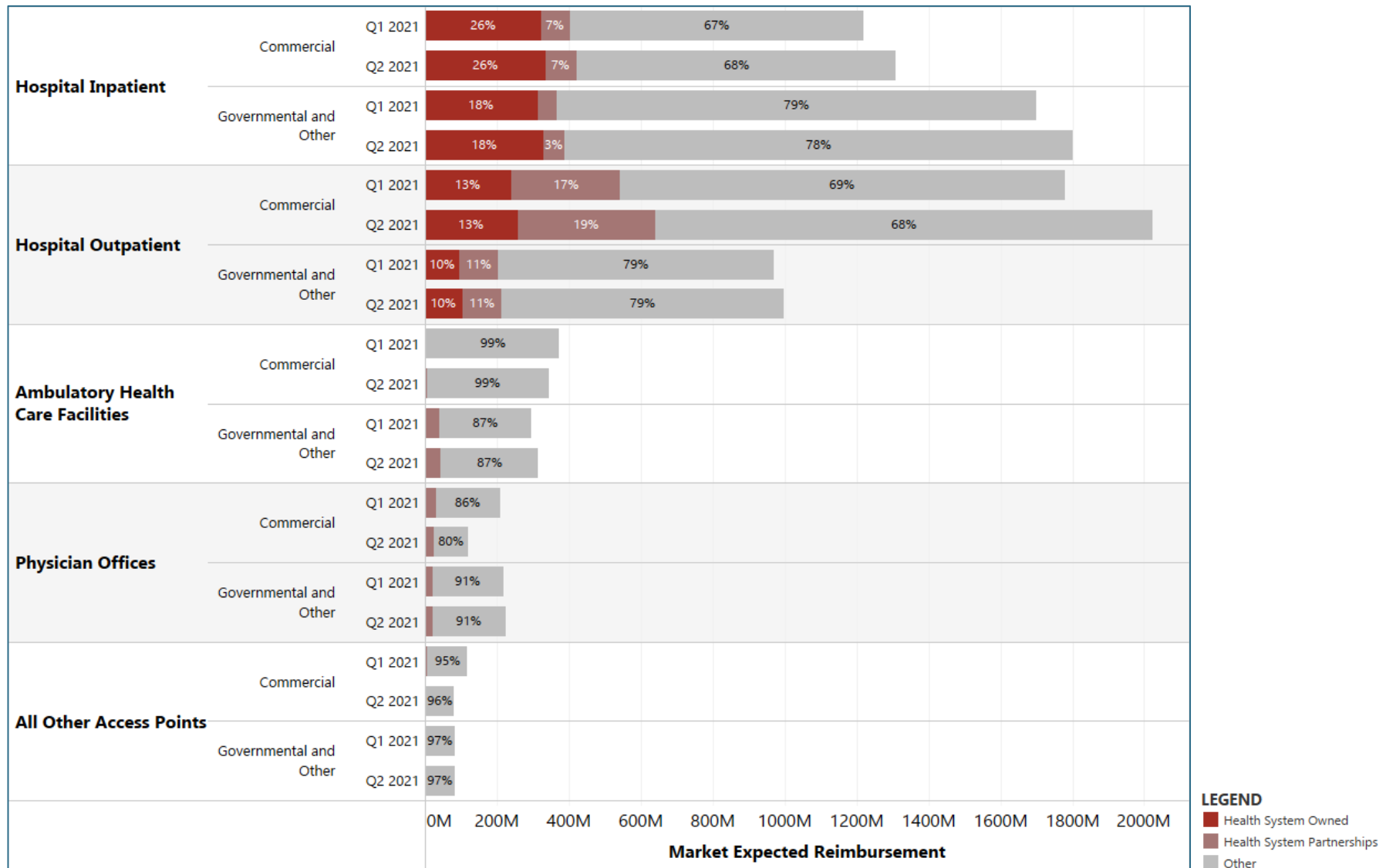
Baptist Health Patient Attraction KPIs:
Market-Based Patient Share of Care – Priority Service Lines
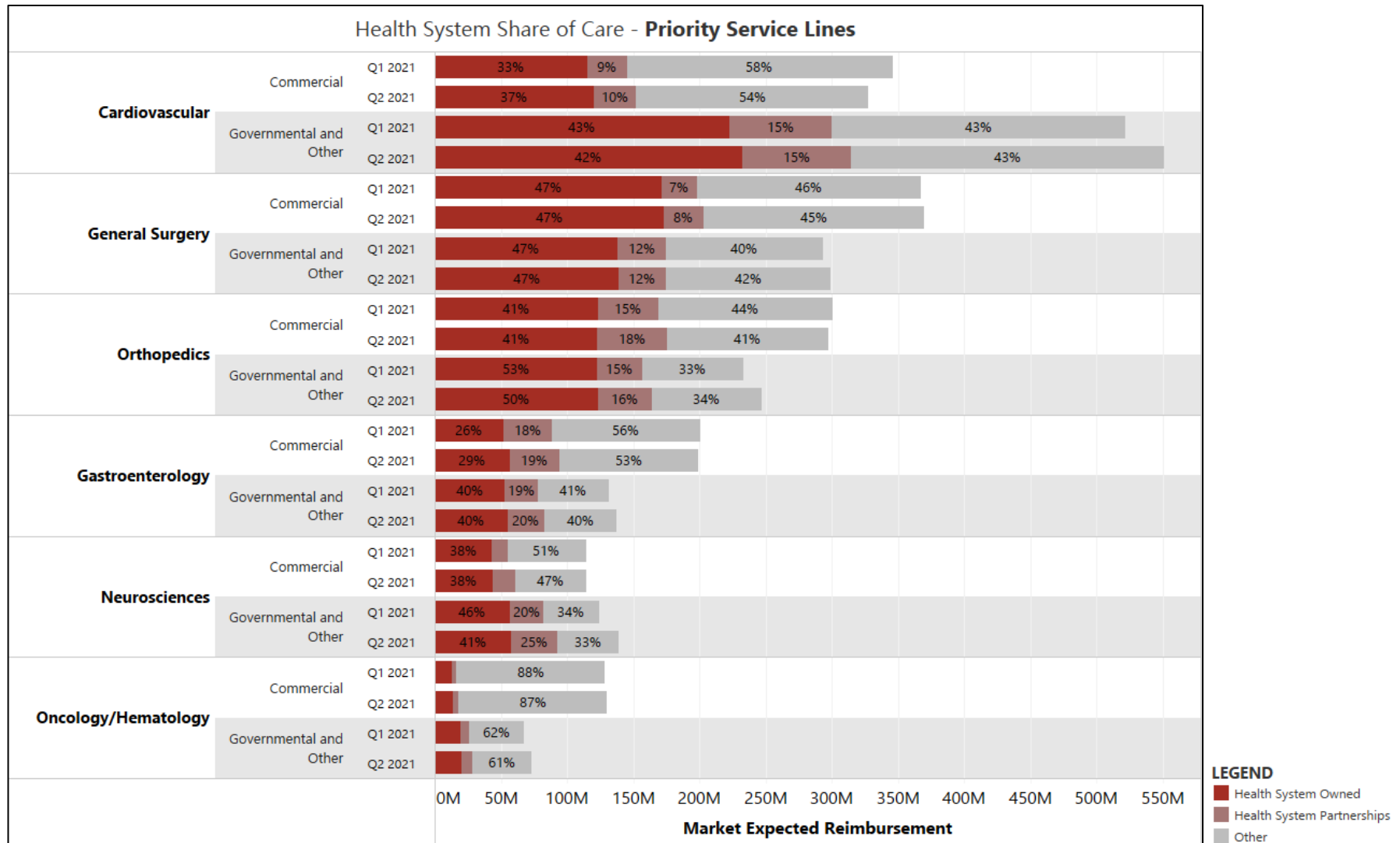
Baptist Health Patient Attraction KPIs:
Market-Based Patient Share of Care – Sub Service Lines

Health System Share of Care - **Cardiovascular Sub-Service Lines**

Service Line	Quarter	Health System Owned	Health System Partnerships	Other
Medical Cardiology	Q1 2021	35%	12%	53%
	Q2 2021	37%	14%	49%
Cardiac Surgery	Q1 2021	46%	18%	36%
	Q2 2021	46%	16%	38%
Cardiac EP	Q1 2021	42%	9%	49%
	Q2 2021	42%	11%	46%
Diagnostic Cath	Q1 2021	37%	13%	51%
	Q2 2021	38%	13%	49%
Cardiac Cath	Q1 2021	46%	15%	39%
	Q2 2021	47%	14%	39%
Vascular Surgery	Q1 2021	43%	12%	44%
	Q2 2021	44%	13%	43%
Vascular Cath	Q1 2021	26%		69%
	Q2 2021	28%		67%
Vascular Medicine	Q1 2021			70%
	Q2 2021			63%
Outpatient Cardiac Diagnostics	Q1 2021			97%
	Q2 2021			96%
Vascular Outpatient Diagnostics	Q1 2021			
	Q2 2021			

Market Expected Reimbursement (0M, 20M, 40M, 60M, 80M, 100M, 120M, 140M, 160M, 180M)

LEGEND
- Health System Owned
- Health System Partnerships
- Other

Baptist Health Patient Retention KPIs:
In-Network Capture from Primary Care to Specialty Care

90-DAY PATIENT FLOW FROM EMPLOYED PRIMARY CARE TO EMPLOYED/ACTIVE MEDICAL STAFF SPECIALISTS – BY INDIVIDUAL PCP

Provider Drill Down Example	Source Provider Name	Obstetrics & Gynecology			Orthopaedic Surgery			Surgery			Cardiology		Hematology & Oncology		N
	PCP #1	83%	17%		91%	9%		93%	7%		48%	52%	93%	7%	595
	PCP #2	97%	3%		76%	23%	1%	60%	17%	23%	75%	25%	73%	27%	551
	PCP #3	88%	12%		83%	9%	8%	81%	8%	11%	77%	23%	25%	75%	443
	PCP #4	98%	2%		61%	39%		90%	10%		43%	57%	83%	17%	435
	PCP #5	100%			63%	37%		83%	12%	4%	50%	50%	87%	13%	355
	PCP #6	97%	3%		81%	19%		67%	27%	6%	89%	11%	100%		344
	PCP #7	85%	15%		79%	21%		98%	2%		84%	16%	76%	24%	337
	PCP #8	60%	40%		94%	6%		94%	6%		91%	9%	36%	64%	224
	PCP #9	98%	2%		93%	7%		45%	45%	9%	78%	22%	82%	18%	217
	PCP #10	61%	39%		73%	27%		89%	11%		78%	22%	100%		145
	PCP #11	100%			87%	13%		100%			100%				75

Provider Drill Down Example

Visits to Key Specialities occuring within 90 days of a patient interaction with a client employed primary care provider.

Grouped by primary care provider.

Shown as percent of total, grouped by employment and medical staff status of specialist.

Category
- Employed
- Active/Associate Staff
- Other

Management and Communication of KPIs

Measurement and Management of KPIs – Part I

There Are No Silver Bullets To Growth

Measure	&	Manage
• What's our current state (benchmark)? • What are the trends over time? • What are the critical issues that my team needs to deal with? • Are we getting a return on investments in time and resources allocated?		• Ensure reporting mechanisms are optimized to define opportunities for improvement and drill-down • Engage providers in root cause discussions • Build a plan and execute • Dig into areas showing issues

Goal: Create a repeatable system or a program that keeps your organization focused on incremental improvement

Measurement of KPIs – Part II

Process	Measure

Process

1. Strategy Group (executives) review Share of Care and set initial 3-year goals

2. Dialogue with Strategy Group and service line leadership to confirm goals

3. Service lines develop plans to meet targets and return to Strategy Group to present/affirm

4. Service line implements with periodic (6-9 months) performance check-ins

Measure

Share of Care

X1	X2	Baseline* Market $ or 👤	Baseline* BH $ or 👤	Baseline* BH %	Target Min	Target Max	Min $/👤 Add	Min % Grow	Min % Share	Max $/👤 Add	Max % Grow	Max % Share
Front Door	Front Door 1	👤 225	24	10.7%	25.0%	30.0%	38	159.0%	14.3%	51	214.5%	19.3%
	Front Door 2	👤 559										
	Front Door 3	👤 365										
	Front Door 4	$ $806.8	$190.4	23.6%	28.0%	33.6%	$42.0	22.1%	4.4%	$95.5	50.1%	10.0%
Ambulatory	Ambulatory 1											
	Ambulatory 2											
Specialty	Service Line 1	$ $911.1	$211.5	23.2%	25.1%	30.1%	$19.8	9.4%	1.8%	$73.8	34.9%	6.8%
	Service Line 2	$ $582.4	$164.9	28.3%	31.9%	38.2%	$24.4	14.8%	3.5%	$68.3	41.4%	9.9%
	Service Line 3	$ $531.1	$151.9	28.6%	31.3%	37.5%	$16.8	11.0%	2.7%	$56.1	36.9%	8.9%
	Service Line 4	$ $493.3	$82.6	16.7%	18.4%	22.1%	$9.7	11.7%	1.7%	$31.1	37.7%	5.3%
	Service Line 5	$ $483.2	$61.6	12.7%	14.4%	17.3%	$9.4	15.3%	1.7%	$25.9	42.1%	4.5%
	Service Line 6	$ $332.9	$54.5	16.4%	17.5%	21.0%	$4.4	8.2%	1.1%	$18.2	33.5%	4.6%
	Service Line 7	$ $248.8	$78.3	31.5%	34.8%	41.8%	$9.8	12.5%	3.3%	$30.3	38.7%	10.3%
	Service Line 8	$ $240.2	$62.4	26.0%	28.4%	34.1%	$6.9	11.0%	2.4%	$23.0	36.9%	8.1%
	Service Line 9	$ $102.0	$43.6	42.7%	44.0%	52.8%	$1.5	3.5%	1.3%	$12.1	27.8%	10.1%
New Business	New Business 1											
	New Business 2											
Secondary Market	Secondary 1											
	Secondary 2											
	Secondary 3											
	Secondary 4											
	Secondary 5											
Payer Strategy	Payer 1											
	Payer 2											
	Payer 3											
	Payer 4											

Measurement of KPIs – Part II
Communication & Drill Down
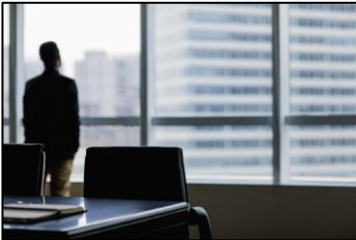
Executive Leadership

Executive leadership teams should have **Growth Strategy KPIs on their monthly or quarterly dashboards.** Patient retention metrics for patients already utilizing your healthcare services are the **lowest hanging fruit for incremental revenue growth.**


Service Line Leadership

Creates service line ownership and enables the team to make and be held accountable for 3-year growth objectives. Empowers service line leadership to engage marketing and strategy personnel as needed to achieve their targets.

Marketing & Strategic Planning

Marketing and strategic planning often leverage data to support provider recruitment efforts, geographic development, and service development based on market dynamics by provider specialization and service capabilities.
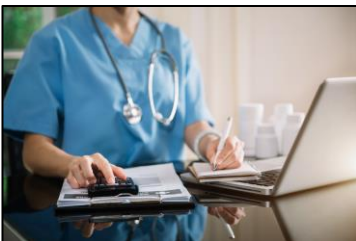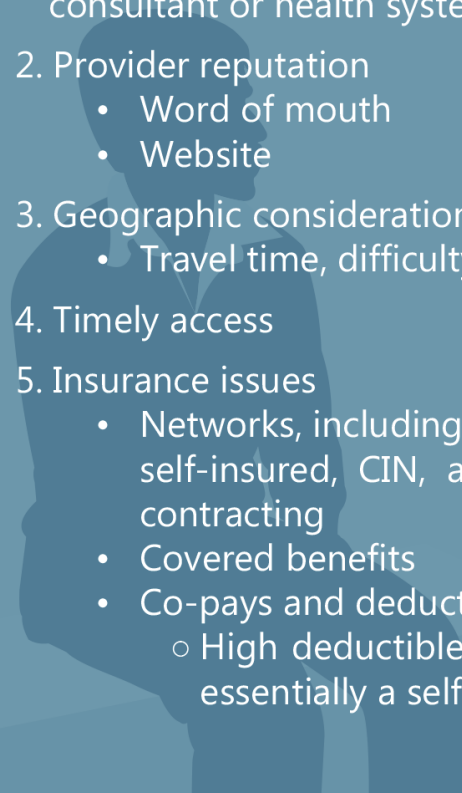

Budget/ Finance

Share of Care is built into **financial dashboards and utilized to project overall potential impact to the organization** is organizational KPI targets are achieved. Data is utilized for ROI analysis on future growth strategy initiatives.

Management of KPIs – Part I
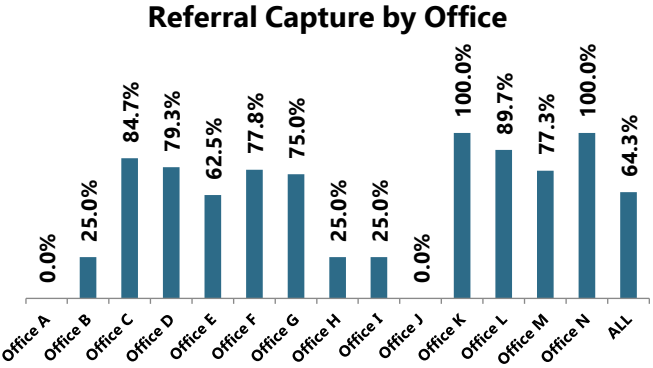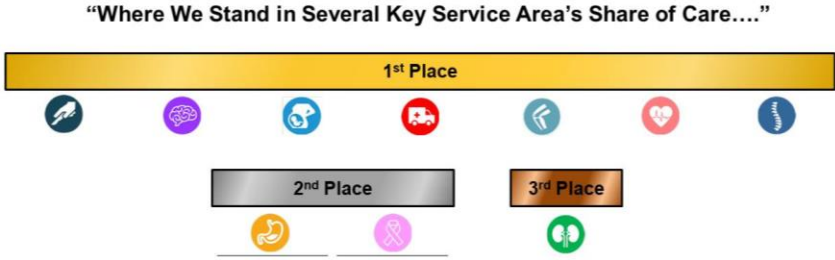*Engage Providers in Root Cause*

PATIENT FACTORS

1. Prior experience and/or relationships with the consultant or health system
2. Provider reputation
   - Word of mouth
   - Website
3. Geographic considerations
   - Travel time, difficulty
4. Timely access
5. Insurance issues
   - Networks, including commercial, self-insured, CIN, and direct employer contracting
   - Covered benefits
   - Co-pays and deductibles
     - High deductible plans make patient essentially a self-pay

PROVIDER FACTORS

1. Noted patient factors
2. Existing relationships
3. New relationships
   - Provider/Consultant care/treatment philosophy
   - Provider/Consultant communication patterns
   - Interpersonal treatment of patient/family
     - Consultant
     - Consultant's office staff
4. Health system relationship
   - Own
   - Other
5. Timely access
6. Insurance issues (including pre-authorization processes)

Management of KPIs – Part II
Engage Providers in Root Cause

Process	Measure

• Track in-network capture based on referrals from primary care network offices
 	
    • Biz Dev works with providers to identify/remove obstacles
 	
• Evaluate service line positioning via multiple data streams
 	
    • IP/OPS activity share (historical)
 	
    • Share of Care (% revenue) with ranking within market	

Referral Capture by Office

Office	Value
Office A	0.0%
Office B	25.0%
Office C	84.7%
Office D	79.3%
Office E	62.5%
Office F	77.8%
Office G	75.0%
Office H	25.0%
Office I	25.0%
Office J	0.0%
Office K	100.0%
Office L	89.7%
Office M	77.3%
Office N	100.0%
ALL	64.3%

"Where We Stand in Several Key Service Area's Share of Care...."

1st Place
2nd Place
3rd Place

Conclusion and Takeaways

✓ Develop KPIs that keep your organization focused on core strategic growth initiatives.

- **Baptist Health 5-Year Goal** = "Growth For the Future"
- **Share of Care** = Revenue Growth Measurement
- **In-Network Referrals** = Maximize Patient Retention

✓ Engage Team Members in Developing KPI Targets

- Executive Team Leads
- Service Line Leaders Own

✓ Communicate Measurement to Key Organizational Cohorts

- **Service Line Leadership**: Creates Ownership at SL Level
- **Budget/Finance**: Focuses on Revenue Targets

HSG | Questions

Next Steps

Be sure to complete SHSMD's post webinar survey questions to receive a recording or PDF version of this session along with a white paper on Patient Share of Care as a revenue-based growth metric.

Thank you for joining our session!

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Chad Reece
Director of Planning and Marketing