

Strategic  
**Health Care**  
Marketing

# Thrive in the Brave New World of Health Care Consumerism:

4 Keys to Creating Patient Connections—and  
How Carolinas HealthCare System Is Making  
it Happen

# Your Presenters



**Lindsay Resnick, MHA**, is Chief Marketing Officer at Wunderman Health. With 30 years of professional experience in health care and insurance, Lindsay is responsible for Wunderman Health's marketing efforts as well as business development and client strategic counsel. Wunderman is a digital and direct marketing agency with 170 offices in 60 countries.



**Pamela DeSalvo Landis** is vice president of Information Services at Carolinas HealthCare System, an \$8.7 billion integrated delivery network in the Carolinas with more than 650 care locations. Carolinas HealthCare System is one of the nation's leading and most innovative health care organizations and provides a full spectrum of health care and wellness programs throughout North and South Carolina.



# Brave New World of Health Care Consumerism

Lindsay R. Resnick, MHA  
Chief Marketing Officer  
Wunderman Health



WUNDERMAN  
HEALTH

There are decades when nothing happens,  
then there are weeks where decades happen.

# 2015: What We Saw



- **12 million** new under age-65 Americans bought on-exchange individual health insurance [Mintel]
- **3.4 million** Americans qualified for Medicare (18 million more in next 5-years) [Citi]
- **10 million** new Medicaid beneficiaries enrolled in privately run plans under ACA [Forbes]
- **50% U.S. hospitals** part of multi-facility health system & **42% of physicians** are salaried employees [NEJM]
- 2015 on pace to beat 2014 healthcare venture investments of \$8.6 billion (30% increase over 2013) [SVB]
- Healthcare M&A and **industry consolidation** saw its biggest year ever –

Anthem---Cigna \$54B

Medtronic---Covidien \$43B

Teva---Allergan Generics \$40.5B

Aetna---Humana \$37B

Pfizer---Hospira \$15B

CVS---Omnicare \$13B

UnitedHealth---Catamaran \$12.8B

Centene---HealthNet \$6.3B

Blue Shield of CA---Care1st \$1.2B

IBM---Merge Health \$1B

Pfizer---Allergan \$160B

Walgreens---Rite Aid \$17B

Kaiser---Group Health \$2B

Towers Watson---Willis \$18B

IBM---Truven \$2.6B



# 2016: Long View



## ECONOMY

1. Looming: 2016 elections, DC gridlock, debt ceiling, Fed rate hike
  2. Barometer: Employment, retail sales, manufacturing production, DOW J
  3. Activist consumerism: on-demand, gig, sharing or access economy
- 

## MARKETING

1. Shifting demographics: micro-segmentation, multi-cultural, omnichannel
  2. Balance: content (*relevance*), brand (*awareness*) & direct (*response*)
  3. Digitalization: IoT, eCommerce, mCommerce, sCommerce, Digital Health
- 

## HEALTHCARE

1. Disruption: payer, provider & pharma consolidation, blurring lines, trust gaps
  2. Trending: value over volume, quantified-self, precision medicine, DIY healthcare
  3. Government as a business partner: ACA, Medicare, Medicaid, FDA, CMS
-

# Customer Connections



**Healthcare consumerism transforms every aspect of the customer relationship.**

Engaged, connected healthcare customers will demand more value from their health care interactions, resulting in better care and better outcomes.



## INSIGHTS

Take data, structure it and create insights that inform strategy



## COMMUNICATION

Make it about ME because my interest is won or lost in seconds



## EXPERIENCES

Your brand is now inseparable from your customer experiences



## HEALTH

Connected devices unite technology, science & consumerism

**Believe in the power of the individual**



# CONNECTED INSIGHTS

**BIG DATA** Volume, Velocity, Variety, Veracity

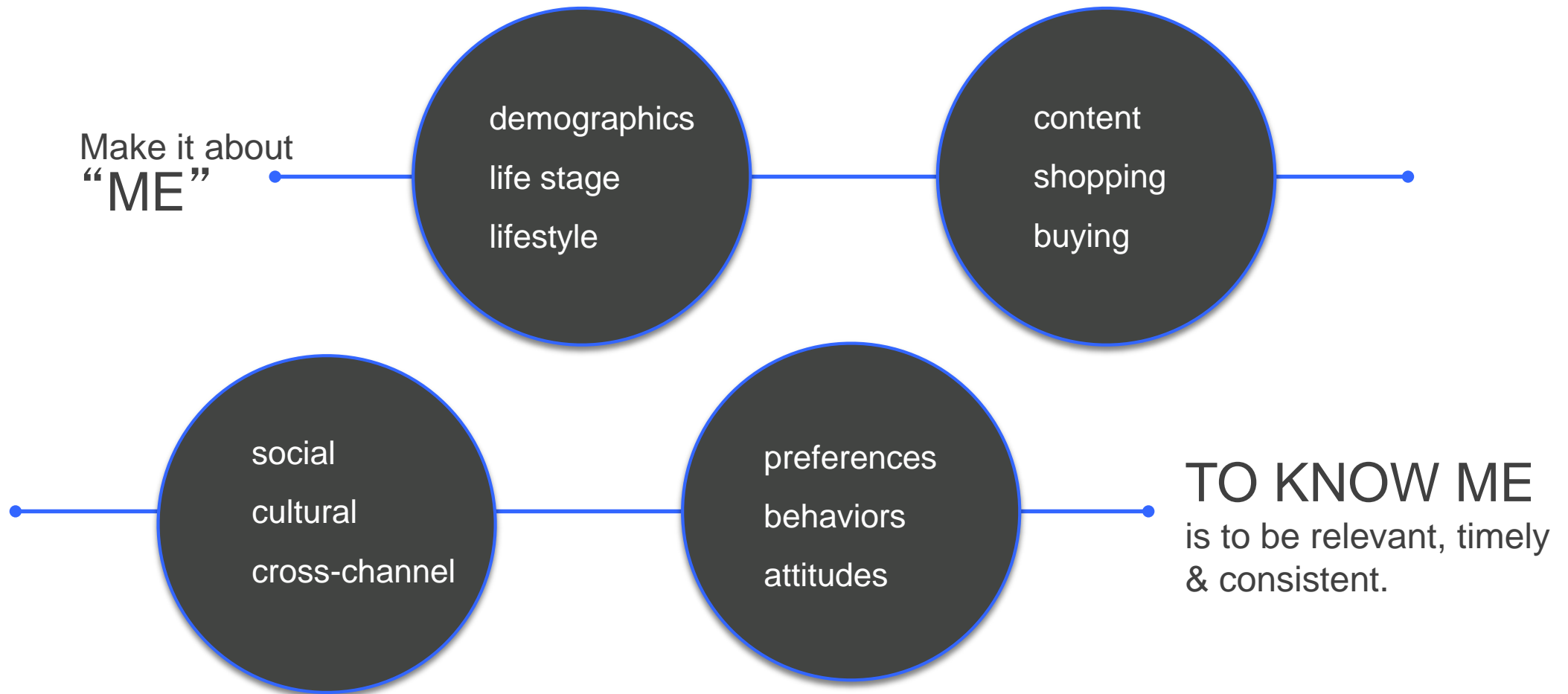
Unit	Storage
bit	
byte	Character
Kilobyte	Half page of text
Megabyte	Two minute MP3 file
Gigabyte	One hour movie (approx)
Terabyte	128 DVD movies
Petabyte	7 billion Facebook photos
Exabyte	50,000 years of DVD video
Zettabyte	180 million x Library of Congress

Every day we create **2.5 quintillion bytes** of data...or 57.5 billion 32 GB iPads.

90% of the world's data has been created in the last two years.



# Data-driven personalized **connected insights**





# CONNECTED INSIGHTS

**Inform strategy with deep insights to understand customers better than competitors.**

## ***MAKE IT HAPPEN***

- Create an **enterprise data strategy** integrated & connected across functions.
- Formalize processes to collect, ingest & analyze customer data sources.
- Know your customer throughout lifecycle, by market, product-line & sales channel.
- **Get personal** by merging cultural, social & digital data into a picture of your customer.

*The more predictive the insight the better the result.*



# CONNECTED COMMUNICATION



# Evoke emotion with **connected communication**

What you care about  
**WHAT YOUR  
CUSTOMER  
CARES ABOUT**

**76%** companies  
use **social media**  
to achieve business  
goals tied to ROI



**1 billion**  
consumers will  
use **mobile  
payment**  
next 2-years

**52%** consumers  
want **Web rankings**  
for price, quality &  
reviews of hospitals  
and MDs

**40%** MDs now  
**communicate  
online** with their  
patients

My interest is  
**WON OR LOST**  
in seconds





# CONNECTED COMMUNICATION

**Meet customers at their moment of need by synchronizing across channels.**

## ***MAKE IT HAPPEN***

- Use **omnichannel–multiscreen** marketing to extend reach & engagement.
- Make marketing dollars accountable as brand & direct converge.
- Create content that is shareable, useful, fresh, unique...*and worthy of attention.*
- Validate messaging & channel selection using **test, learn & measure.**

*Real engagement gets customers to happily “opt-in”.*



# CONNECTED EXPERIENCES



# Align people around **connected experiences**

10 PIECES OF  
CONTENT  
consumed before  
purchase decision

## PATH TO PURCHASE

Awareness  
Consideration  
Preference  
Purchase  
Engagement

## HEALTHCARE

Product Commodization  
Service Parity  
Price Transparency  
Brand Neutralization

## EMPOWERMENT

Peer reliance  
Immediacy  
Authenticity  
Consistency

## PATH TO LOYALTY

Retain  
Rebuy  
Review  
Refer  
Recommend

86% consumers will  
pay more for better  
**CUSTOMER  
EXPERIENCE**





# CONNECTED EXPERIENCES

**Engage, empower and inspire while creating a reciprocal customer relationship.**

## ***MAKE IT HAPPEN***

- Map your customers' journey by looking inside-out (VOE) & outside-in (VOC).
- **Break down silos** to organize people, processes & technology around **CX**.
- Get sponsorship from C-Suite to establish **customer-first corporate culture**.
- Keep an “open door” for customer reviews & feedback to improve interactions.

*Value comes from a differentiated, immersive brand experience.*





# CONNECTED HEALTH



# Improve well-being with **connected health**

Nothing is more **PERSONAL** than your **HEALTH.**

**70%** companies to offer **telemedicine** as employee benefit by 2017

## CONSUMERS

Obesity	100
Smoking	42
Asthma	26
Diabetes	29
Pre-diabetic	86

## HEALTHCARE...

Consumerization  
Retailization  
Digitalization  
Medicalization  
Uberization

## OUTCOMES

Participation  
Engagement  
Adherence  
Trustability  
Improvement

50 billion IoT connected devices in next 5 years with  $\frac{1}{3}$  **IN HEALTHCARE**





# CONNECTED HEALTH

**Leverage technology to help customers take ownership of their health.**

## ***MAKE IT HAPPEN***

- Establish an **innovation strategy** linked to corporate goals & customer realities.
- Avoid “crapplications” - have digital purpose: inform, instruct, track, guide, or remind.
- Closely monitor digital health policies & regulation (e.g., ethics, payment, privacy).
- Formalize **metric-based business case** around usability, ROI & engageability.

*The empowered healthcare journey has arrived.*



# Connected customers are in control



## CUSTOMER CONNECTED MARKETING

THEN	NOW
Targeting	Personal Insights
Campaigns	Channel Engagement
Broad Media	Micro-Moments
Transactions	Value Exchange
Acquisition	Relationships
Sickness & Illness	Prevention & Wellness

If we ask health care consumers to take personal responsibility for financial & clinical decisions, **they need help** making smart, value-based choices.



- Educate & guide your customers
- Provide information on price & quality
- Engage for better health & quality of life
- Reward healthy behavior & choices
- Communicate on their terms







**Lindsay R. Resnick**  
Chief Marketing Officer

[lindsay.resnick@wunderman.com](mailto:lindsay.resnick@wunderman.com)

[www.wunderman.com](http://www.wunderman.com)

[@ResnickLR](https://twitter.com/ResnickLR)

**WUNDERMAN  
HEALTH**



WUNDERMAN  
HEALTH

Wunderman Health is a global digital marketing agency that integrates data and creative to amplify brand awareness, drive acquisition, and strengthen customer relationships.

Clients across healthcare sectors include pharmaceutical and biotechnology, insurance and provider systems, and medical device and health technology.

Wunderman Health delivers communications that engage and empower both healthcare consumers and professionals by connecting them to moments that inspire action.

Wunderman is part of WPP (NASDAQ: WPPGY).

**Creatively Driven. Data Inspired.**



Carolinan HealthCare System

# Patient Engagement

Pamela DeSalvo Landis

@plandis1

[Pam.landis@carolinanhealthcare.org](mailto:Pam.landis@carolinanhealthcare.org)

One



# WHO WE ARE

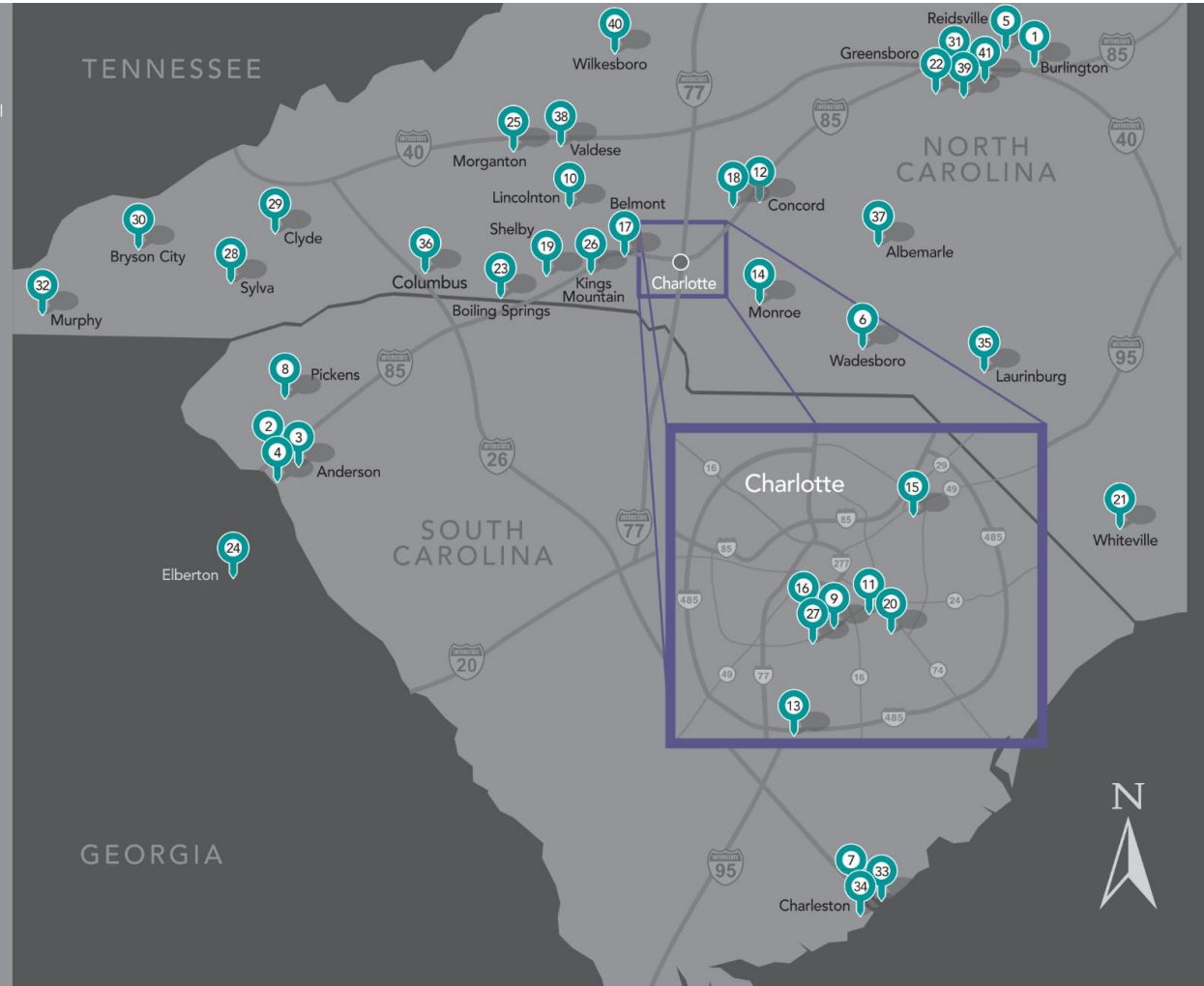
**Carolinas HealthCare System** has a unique story to share. Operating as a fully integrated system and **connecting and transforming** care delivery throughout the Carolinas, our overarching goal is to provide seamless access to coordinated, high quality healthcare – and provide that care **closer to where our patients live.**

**With 39 hospitals and 900+ care locations, the depth and breadth of services results in a full continuum of integrated care including:**

- Prevention and general wellness
- Primary care at more than 180 locations
- Specialty care via several nationally recognized service lines
- Critical care with one of the largest virtual (e-ICU) programs in the nation
- Continuing care including home health, skilled nursing, hospice, palliative care centers, inpatient/outpatient rehab, and long-term acute care hospital

# WHERE WE ARE

1. Alamance Regional Medical Center
2. AnMed Health Medical Center
3. AnMed Health Rehabilitation Hospital
4. AnMed Health Women's and Children's Hospital
5. Annie Penn Hospital
6. Anson Community Hospital
7. Bon Secours/St. Francis Hospital
8. Cannon Memorial Hospital
9. Carolinas Medical Center
10. Carolinas Medical Center-Lincoln
11. Carolinas Medical Center-Mercy
12. Carolinas Medical Center-NorthEast
13. Carolinas Medical Center-Pineville
14. Carolinas Medical Center-Union
15. Carolinas Medical Center-University
16. Carolinas Rehabilitation
17. Carolinas Rehabilitation-Mount Holly
18. Carolinas Rehabilitation-NorthEast
19. Cleveland Regional Medical Center
20. CMC-Randolph
21. Cone Health Behavioral Health Hospital
22. Cone Health Behavioral Health Hospital
23. Crawley Memorial Hospital
24. Elbert Memorial Hospital
25. Grace Hospital
26. Kings Mountain Hospital
27. Levine Children's Hospital
28. MedWest-Harris
29. MedWest-Haywood
30. MedWest-Swain
31. Moses H. Cone Memorial Hospital
32. Murphy Medical Center
33. Roper Hospital
34. Roper St. Francis-Mount Pleasant Hospital
35. Scotland Memorial Hospital
36. St. Luke's Hospital
37. Stanly Regional Medical Center
38. Valdese Hospital
39. Wesley Long Hospital
40. Wilkes Regional Medical Center
41. Women's Hospital





## Carolinas Response

- **Virtual Care**
  - Visits, Monitoring, ICU, NICU
- **Patient Access and Convenience**
  - New Registration and Appointment Systems
- **Community Connectivity**
  - HIE
- **Analytics**
  - Predictive analytics
- **Patient Engagement**
  - MyCarolinas, Tracker tools, Interactive TV, Prescribed Apps, Care Management, Consumer tools



Carolinah HealthCare System

Virtual Visit

**NOW AVAILABLE**

to virtually everyone in  
NORTH CAROLINA

# Virtual Visit

24/7 care from your phone,  
tablet or computer.



### Weekly Overall

% of Visits Providing		
Rating	20%	28%
Average Rating of:		
Care	4.4	4.5
Provider	4.8	4.8

**Rx** PRESCRIPTIONS,  
AS APPROPRIATE

**\$49** PER  
VISIT

Online





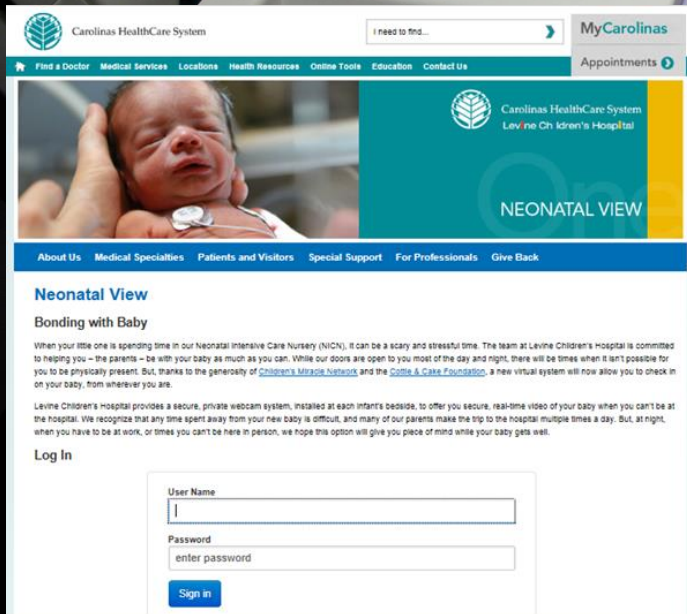
Carolinus HealthCare System

# Virtual ICU





# NICU Cameras



The screenshot shows the 'Neonatal View' web application interface. At the top, it features the 'Carolinan HealthCare System' logo and a search bar. Below this is a navigation menu with links for 'Find a Doctor', 'Medical Services', 'Locations', 'Health Resources', 'Online Tools', 'Education', and 'Contact Us'. The main header area includes a photo of a newborn baby and the text 'Carolinan HealthCare System, Levine Children's Hospital, NEONATAL VIEW'. A secondary navigation bar contains links for 'About Us', 'Medical Specialties', 'Patients and Visitors', 'Special Support', 'For Professionals', and 'Give Back'. The main content area is titled 'Neonatal View' and 'Bonding with Baby'. It contains a paragraph explaining the service: 'When your little one is spending time in our Neonatal Intensive Care Nursery (NICU), it can be a scary and stressful time. The team at Levine Children's Hospital is committed to helping you - the parents - be with your baby as much as you can. While our doors are open to you most of the day and night, there will be times when it isn't possible for you to be physically present. But, thanks to the generosity of [Children's Miracle Network](#) and the [Come & Care Foundation](#), a new virtual system will now allow you to check in on your baby, from wherever you are.' Below this is another paragraph: 'Levine Children's Hospital provides a secure, private webcam system, installed at each infant's bedside, to offer you secure, real-time video of your baby when you can't be at the hospital. We recognize that any time spent away from your new baby is difficult, and many of our parents make the trip to the hospital multiple times a day. But, at night, when you have to be at work, or times you can't be here in person, we hope this option will give you peace of mind while your baby gets well.' At the bottom, there is a 'Log In' section with a 'User Name' field, a 'Password' field, and a 'Sign In' button.





# Patient Access and Convenience





## Carolinas Connect

- 38 Hospitals; 250 Practices
- 3 HIEs
- 237 systems
- 3.7 million patient records

One



Carolinas HealthCare System

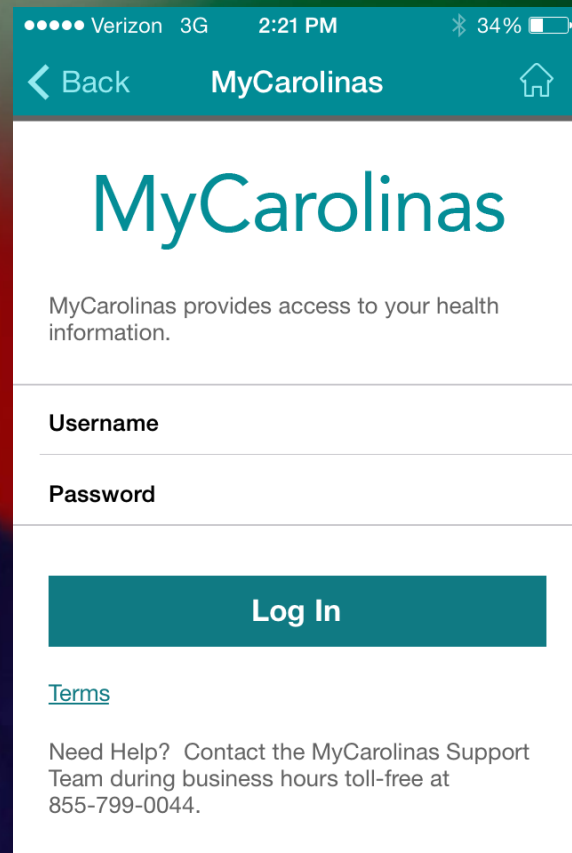



# Analytics

- 35 Terabytes of Data
- Tools on top to help with predictive modeling
- Dashboards
- Quality reports
- Supporting
  - Care Management
  - Customer relationship management
  - Quality and safety efforts

# Patient Engagement MyCarolinas

- 550,000 users
- Mobile
- Pulls together data from EMR, GetWell, MyCarolinas Tracker, Open Notes



Verizon 3G 2:21 PM 34%

< Back MyCarolinas

## MyCarolinas

MyCarolinas provides access to your health information.

**Username**

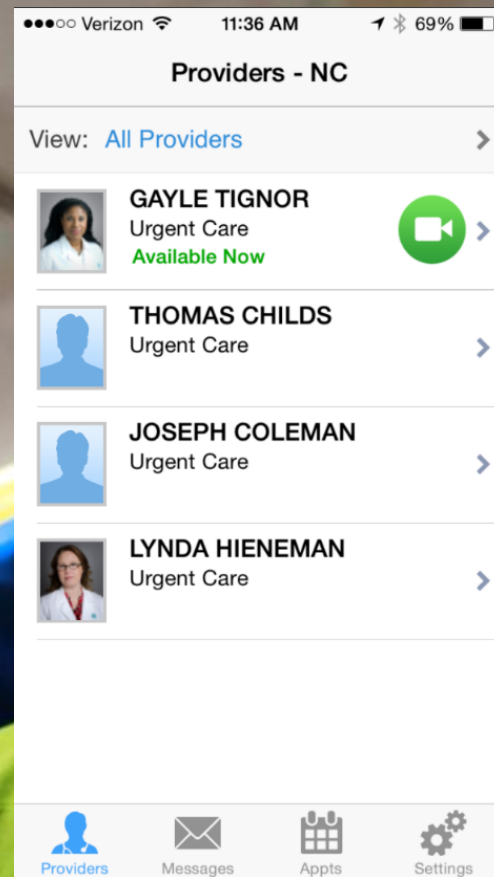
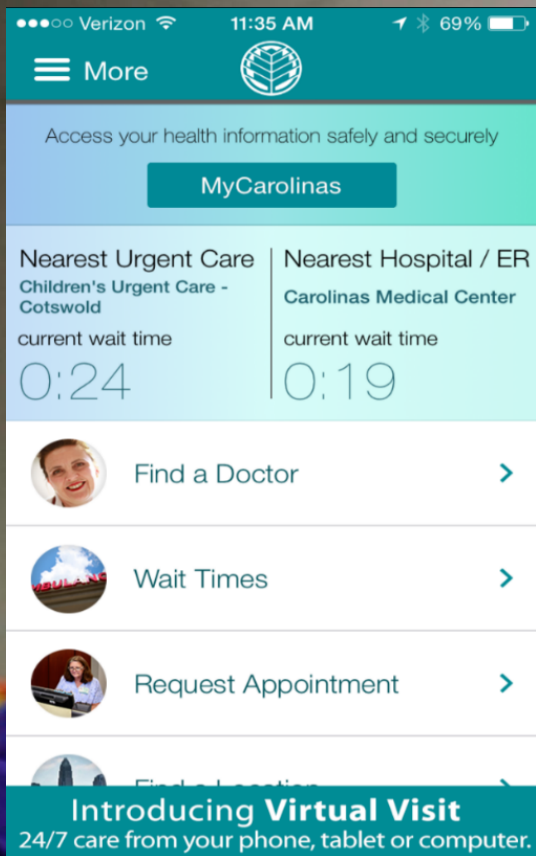
**Password**

**Log In**

[Terms](#)

Need Help? Contact the MyCarolinas Support Team during business hours toll-free at 855-799-0044.







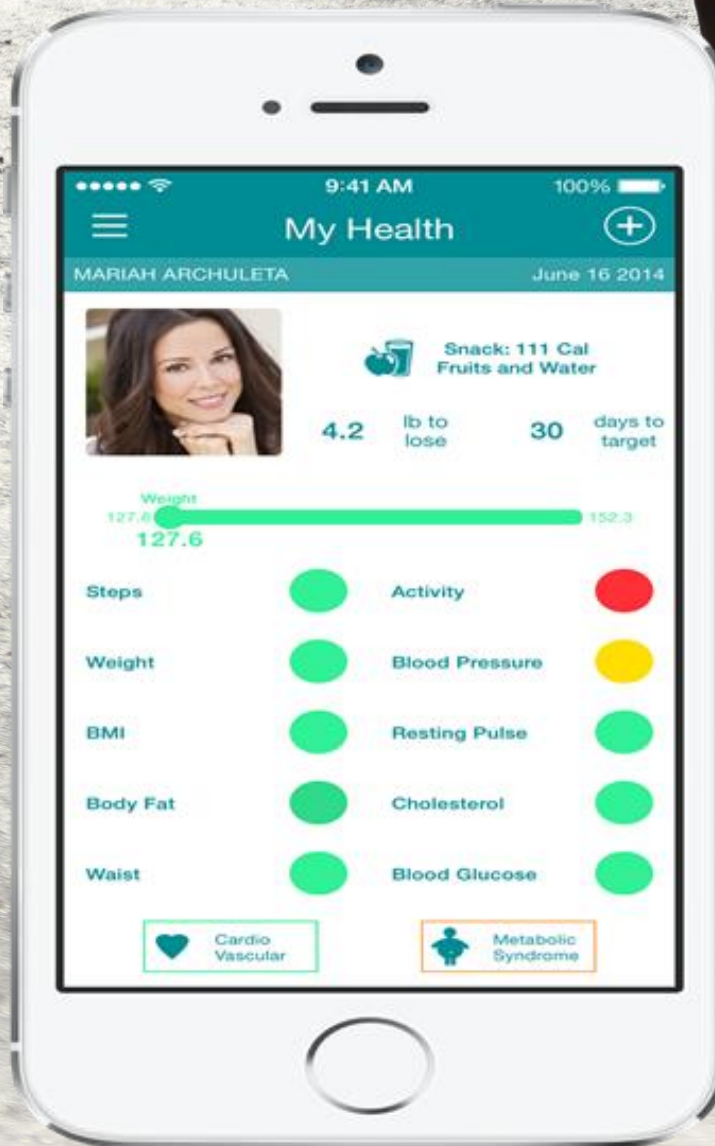
# MyCarolinas Tracker

- Integrates data from more than 80 devices
- Provides one place to view all data
- Integrates to MyCarolinas
- Integrates to Care Management System





# Putting all the Pieces Together



**Carolinas HealthCare System Patients**  
Current Patient: RYAN REICHERT June 16 2014

Patient	A1C (%)	BMI (kg/m <sup>2</sup> )	Pressure (mm Hg)	Steps (steps)
Archuleta Mariah	6.5	20.0	133/98	9637
Baker Sara	8.0	24.1	162/93	6246
Bell Edward J.	9.4	37.5	141/85	9296
Ferraz Brian	6.3	26.2	117/83	5372
Gretchen Layla	6.5	22.3	116/74	7577
Gagnant Daniel	7.5	24.7	140/82	2189
Gagner Michel	6.3	23.1	122/77	3581
Jones Samantha	8.4	27.4	144/82	2364
Luca Isabella	7.9	27.6	126/85	6657
Leyman Julia	8.0	29.2	122/83	9649
Maruni Alexander	4.5	23.6	126/71	8627
Pezalla Noemie	6.9	34.2	119/79	4807
Reichert Ryan	7.5	23.6	123/80	9197

# Linking the Care

The screenshot displays the MyCarolinas patient portal interface. At the top, a teal navigation bar contains the text "MyCarolinas - 1-855-799-0044", the user name "RICHARD SIMMONS", and a "Sign Out" link. Below this is a white navigation menu with icons for "MyCarolinas Home", "Health Record", "Health Messages", "Appointments and Billing", "My Profile", and "Help and Resources".

The main content area features the "Carolinus Health-Care System" logo and a "Health Trackers" section. A yellow notification banner states: "Your health data is being synchronized for this login with the mobile application data and this may take few seconds to complete. Please press 'Refresh' to load the latest health records. This will redirect you to MHR landing page." A "Refresh" button is located to the right of this message.

Below the notification, the user's profile is shown for "RICHARD SIMMONS" with a "View RICHARD's Patient Profile" link and "Print All Health Trackers" option. The address is listed as "55 Workout Lane, SCHEENECTADY, NY 12345". A "Health Trackers" and "Preferences" menu is visible.

The "Welcome to MyCarolinas Tracker!" section displays several health metrics with progress bars and goal indicators:

- Weight:** 146 lbs on 4/8/2015, +13 since 3/25/2015. Goal (G) is 196, Current (C) is 146.
- BMI:** 22.20 BMI on 4/8/2015, +1.98 since 3/25/2015. Goal (G) is 32.2, Current (C) is 22.2.
- Steps:** 9000 on 4/17/2015, -3000 to reach the goal of 12000. Goal (G) is 12000, Current (C) is 9000.
- Physical Activity:** 30 minutes (211.15 calories) on 4/7/2015.
- Blood Oxygen:** 96% on 3/10/2015. Goal (G) is 100, Current (C) is 96.

Each metric includes a "View Historical" link with a right-pointing arrow.





Carolinan HealthCare System



Carolinan HealthCare System

One

Strategic  
**Health Care**  
Marketing

## Question & Answer Session

Thank you for participating!