WIXCORP WHITE PAPER

Patient Financial Journey Mapping

WIXCORP

Understanding the Customer Experience

As an industry, we tend to view the patient experience primarily through the lens of care delivery. “How did their procedure go”, “were there any complications”, and similar questions are often the focus. While this is clearly important, the goal of this paper is to explore how the patient experience is rapidly becoming more of a customer experience.

For many healthcare organizations, viewing patients as customers provides a framework that clarifies where and how to improve the patient experience. It becomes easier to include the entirety of an experience with your organization through scheduling and registration, receipt of care, discharge, and especially billing. This systemic view enables a deeper dive into understanding your patients' experience.

As you read this paper, I encourage you to discover anew your organization from a customer's perspective. How does it look and feel at every angle, and what could be done to make it better?

To your success,

Jeff Wixom

Jeff Wixom
Co-founder and CXO, Wixcorp

The Business of Healthcare

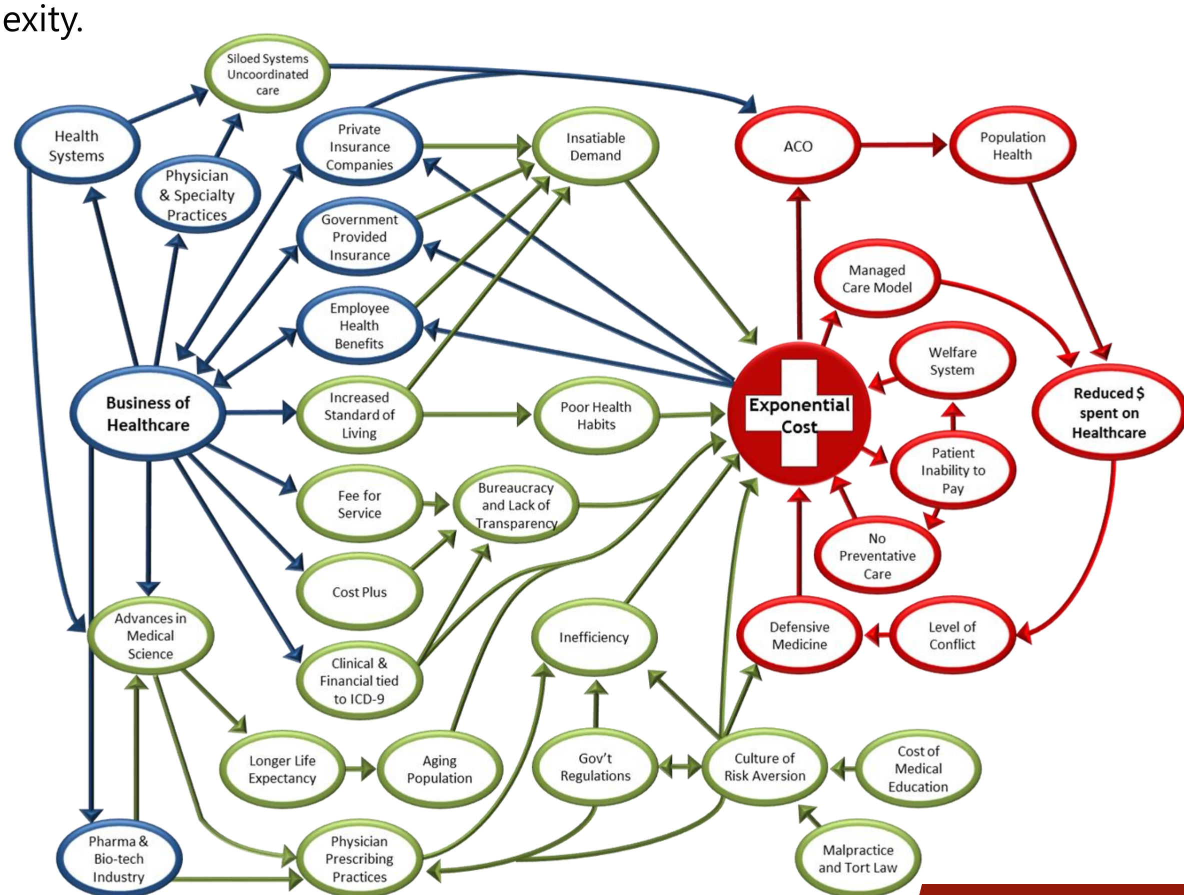
A Complicated Mess

A few years ago, a colleague related an experience he had with a hospital CFO.

"The CFO had a framed receipt on his office wall that was dated back before the start of World War II. The handwritten receipt was to his father from his family physician. It stated something akin to 'Set and wrapped John's broken arm. $5.00 PAID'. He kept it there as a reminder of simpler times, and that his goal was to get healthcare billing back to what it was in his father's day."

As a country, we've gone from a simple and straightforward healthcare delivery and payment model, to a complex and convoluted one. The graphic below tries to visualize the US healthcare system and its driving factors.

One of the main takeaways is that the 'Business of Healthcare' is directly linked to the exponential cost of the current model and is the primary driver of the model's complexity.



Managing Complexity

Healthcare is not the only complex industry that consumers have to interact with. While every industry has its own complexity, leveraging digital solutions has allowed companies to provide a simple and intuitive interface for their consumers. By hiding the complexity behind the technology, consumers feel empowered, and employee workload is lightened.

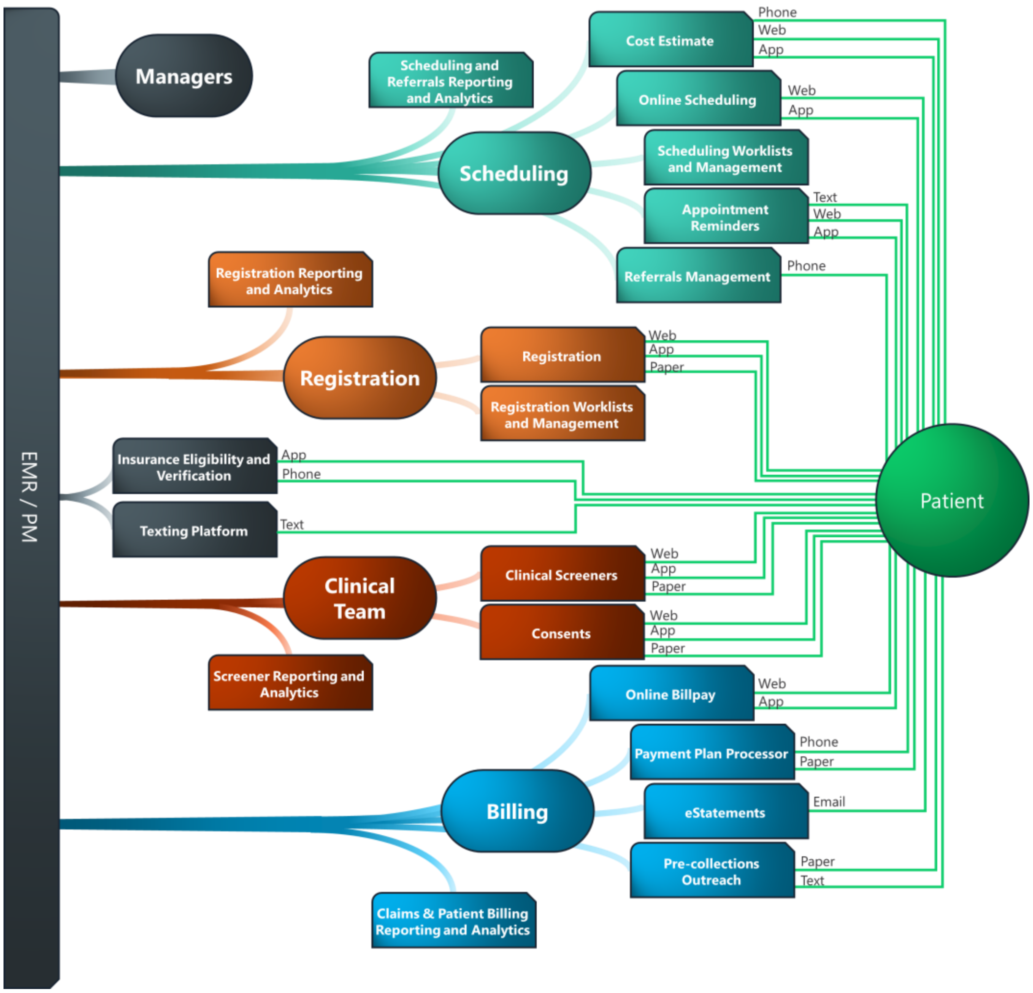
Take Amazon, for example. They have one of the most complex supply chains of any company in the world. They also have one of the largest and most complex fulfillment and delivery requirements. They've created AI-driven voice assistance and some of the most high-tech devices on the market. Not to mention a movie study, audiobook platform, and much more.

Yet customers can navigate all their services via the web, voice, or an app. Amazon has built a self-service omnichannel experience for their customers.

Complexity in Healthcare

Unfortunately, healthcare is not as far along the digital transformation as other industries. While there are many reasons why, one of the primary drivers is the 3rd party payer infrastructure that exists in healthcare.

Historically, patient payments only made up roughly 5% of all hospital revenue.[1] Because of that, hospitals have little incentive to invest in patient-facing RCM solutions. On the clinical side, patient portals were supposed to help engage the patient in their care. However, recent studies have shown that only 15% of patients access their hospital's portal,[2] and only 13.5% access it more than twice annually. [3]



The net result of this, is that there is no Amazon-like experience available for patients to engage with their healthcare providers. Instead of an omni-channel experience they can navigate on their own, patients are left to deal with siloed processes across numerous channels including paper, fax, in-person, and from multiple apps and websites.

1 McKinsey – Hospital Revenue Cycle Operations Created by the ACA
2 GAO Congressional Report "HHS Should Assess the Effectiveness of Its Efforts to Enhance Patient Access to and Use of Electronic Health Information", March 2017
3 ONC "Individuals' use of online medical records and technology for health needs", April 2018

Telling a Story

There are entire management and organizational disciplines devoted to the concepts of this section. You'll find these concepts embedded in the principles of everything from LEAN and Six Sigma to Organizational Theory and Systems Thinking. While the theory's methodologies are interesting and insightful, operationalizing them can be difficult at a systemic level. The proverbial "Devil's in the details" can make it challenging to understand what options are available and their impact across the system.

That's where the idea of a customer, or patient, journey map comes in. As humans, we tend to learn best through stories. By outlining all the salient data elements in the form of a story allows you to simplify complexity and illustrate the abstract. It will align leadership with their teams around a compelling patient journey map.

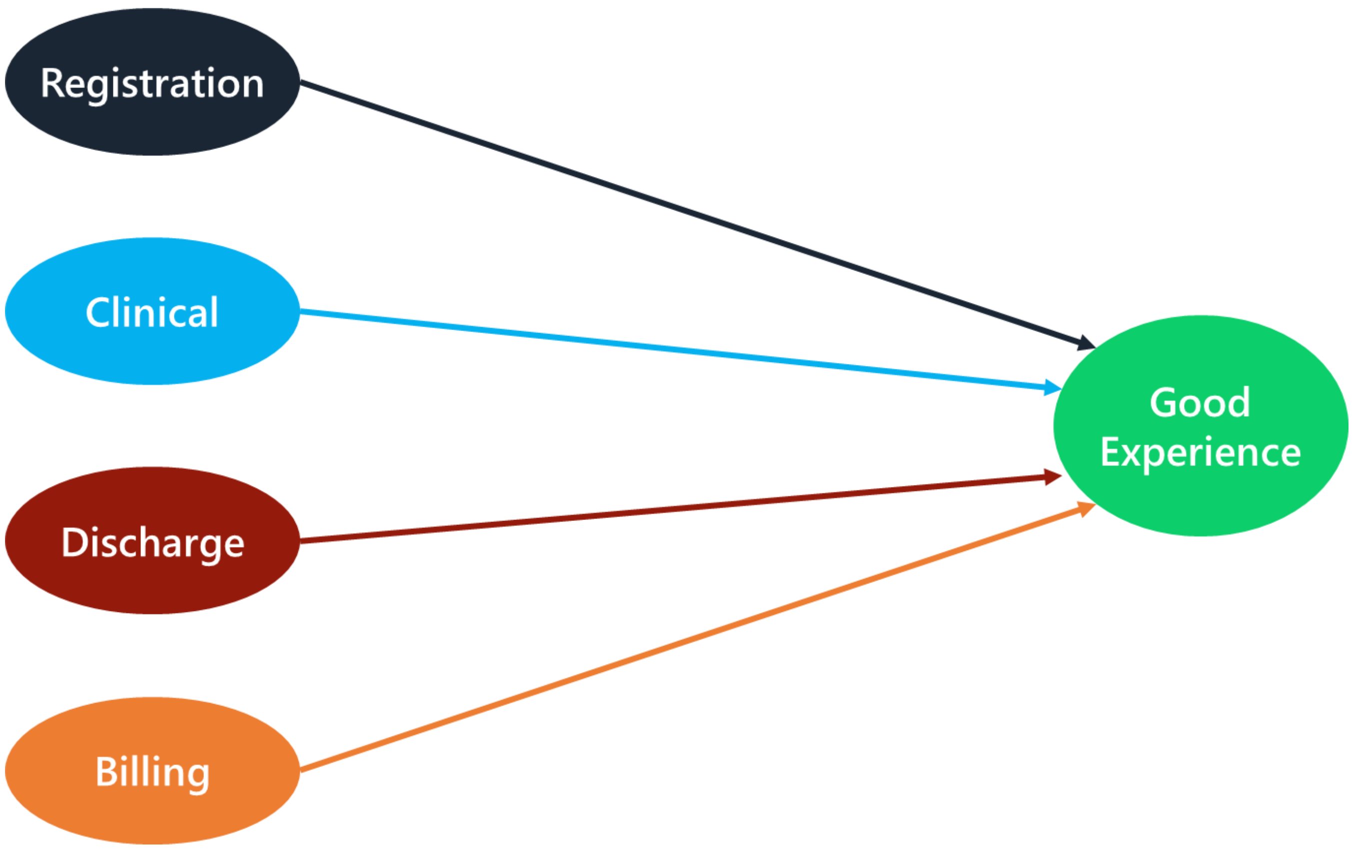
Jeanne Bliss, known as the 'Godmother' of customer experience, describes journey mapping this way:

> *[Customer journey maps are] a framework for leaders to use to guide the direction of the business and drive accountability. It enables them to hold people accountable for improving customers' lives and uniting independent silo scorecards. Every leader I have worked with and every leadership team I have coached have asked for simple language to galvanize people around customer-driven growth.* ***The customer journey provides that talk track.***
>
> ~Jeanne Bliss

Understanding Complex Systems

Dependent vs. Interdependent Variables

The traditional approach to try and understand complex systems like healthcare is to carve it up into manageable pieces and invest into improving each piece. The expected outcome being an overall improved experience. If we were to diagram that out into a simplified view of healthcare, it would look something like this:



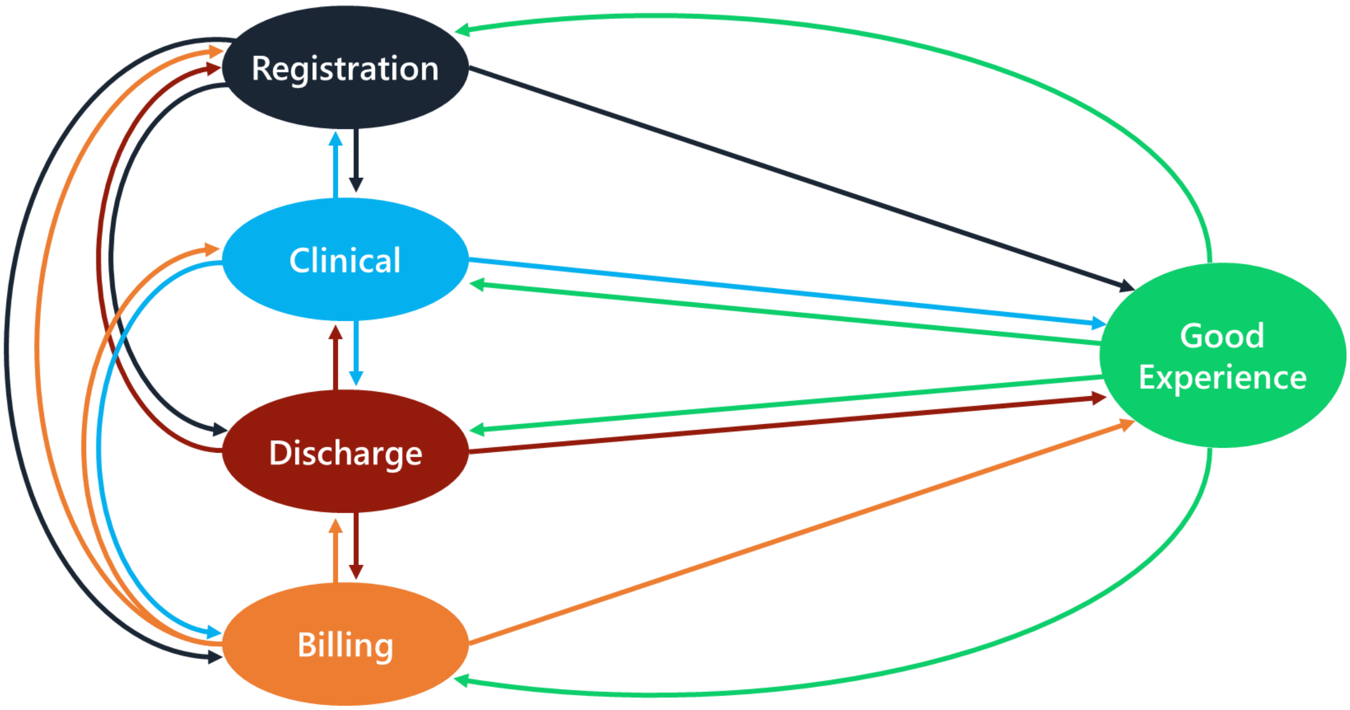
This approach creates dependent variables that are easily managed; with each presumably contributing to an improved overall experience. If you survey a consumer about any one of the four variables, the isolated experience generally does improve.

However, when viewed as a whole, little improvement in experience is reported. [4] Why is that?

4 Jamshid Gharajedaghi "Systems Thinking: Managing Chaos and Complexity: A Platform for Designing Business Architecture" 3rd Edition

Understanding Complex Systems

Improvement isn't easily recognized in this case because systems can't be viewed and managed effectively as a holistic, individual variable. Instead, systems are filled with interdependent variables, which means the previous diagram should look more like this:



When viewed this way, it becomes clear that processes and patient touchpoints initially created to improve the overall experience can often become part of the problem.

By viewing the system as a whole, with a shared vision and perception with your patient, you can begin to see the breakpoints and areas of concern clearly. From there, you can start to design and prioritize a better experience.

An example of this comes from a CFO we met with to do a Patient Financial Journey Mapping session. At the outset, the CFO insisted that they only use their EMR for payment processing – no other vendors or platforms were in use. As we proceeded through the journey mapping session, his team identified seven other payment processors.

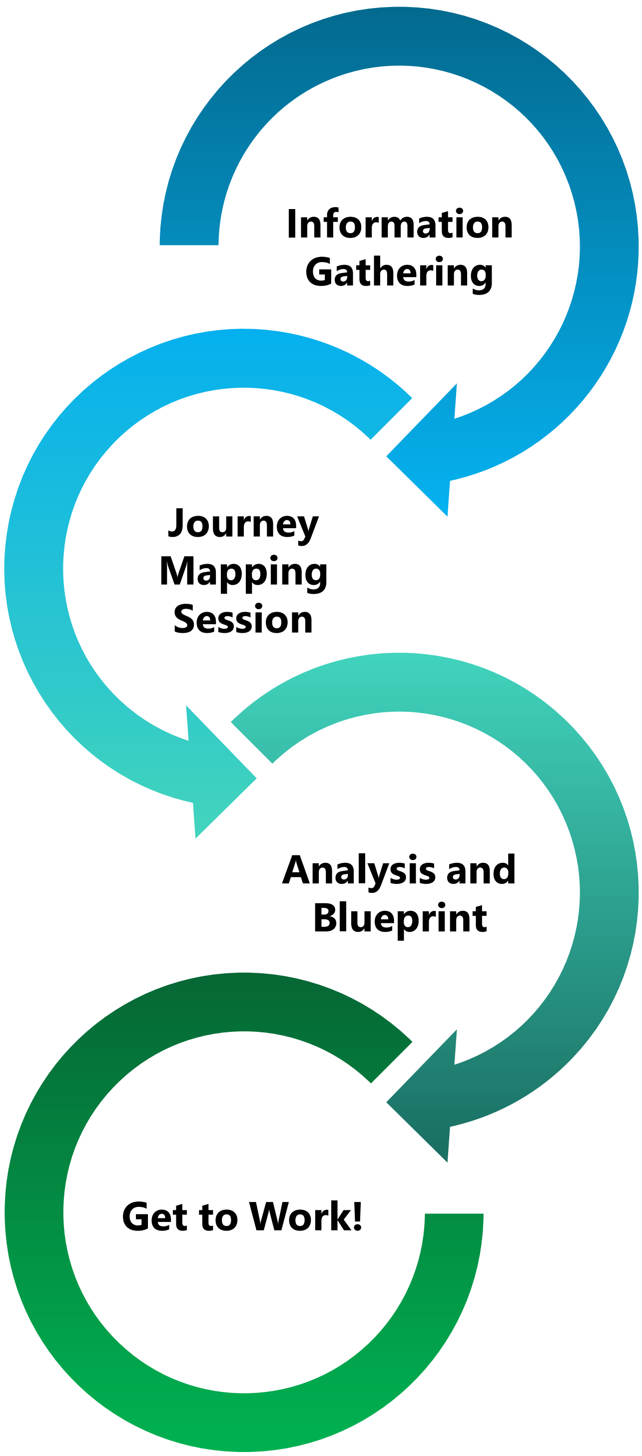
Because they had been looking at their processes as isolated systems, they have yet to identify any support systems and processes between the major departments. Once you focus on the interactions and business processes between systems, you will often find a world or details you never knew existed.

Four Step Process

Creating a successful Patient Journey Map takes more than just pulling data together and putting it on a nice infographic. To achieve meaningful change in your organization, you need your patients and team to feel like they are a part of the solution, that their opinions are heard, and that the desired future will be better than their current reality.

To do this, we've found success using the four-step process of information gathering, journey mapping session, analysis, and blueprint, and then get to work. We will go into detail on each step on the following pages. But before we do, it is essential to put a few ground rules in place:

- Establish a general scope and scale of the project. Is this a department or facility-specific project, or system-wide.
- Outline the business goals you are hoping to achieve in advance.
- Identify the accountable parties for each area the project will touch.
- Create a general timeline for the project with due dates for each of the four steps.
- Agree to be flexible; once you get into the project, be willing to adapt the project based on the information you gather along the way.



Information Gathering

It's important to come to the Patient Journey Mapping Sessions with as much information as possible. Be sure to collect qualitative data (the why and how) and quantitative data (the stats and metrics) for all the areas within the project's scope. Compiling this data will let the team clearly articulate the current state of your patient's experience and how your organization is creating and maintaining it.

Be sure to include patient feedback in your data gathering. Once all the data has been compiled, we recommend compiling it into the categories below. As you do so, here are some helpful questions to consider as you research your current processes:

People
- Who is doing the work?
- Is it an individual or group?
- Are they fully trained (lots of veterans or rookies)?
- Is there a high turnover in that role?

Business Processes
- What are the steps to complete the work?
- Is it manual or automated, digital or paper?
- Are there quality control measures in place?
- Is it consistent or highly variable?

Technology/3rd-Party Vendors
- What software/platforms/devices are used in the process?
- Are they on-site or cloud-based?
- Do you manage them, or is it a 3rd-party?
- Is the integration robust and consistent; is the data reliable?

Emotions (Patient and Employee)
- What do your patients/employees think about the process?
  - Look for emotions like delighted, happy, confused, frustrated, and upset
  - Red, Yellow, and Green scales or a happy/sad rating can be helpful as well

Gaps/Clutter
- What tools/processes/services are currently missing?
- Are there opportunities to simplify or streamline?

Journey Mapping Session

For the Journey Mapping session, you will want someone from all the different areas present so they can contribute the detailed information they've been gathering. As much as possible, strive to walk through the scope of the project from the patient's perspective. Doing so will help you pull everything together around a shared vision.

As you walk through the patient's journey, it's a good idea to have a single facilitator keep everyone on track. We recommend that you document all the information you've been gathering by placing sticky notes on a wall color-coded to people, processes, technology, emotion, and need. Have the facilitator ask lots of open-ended questions. The facilitator's goal should be to collect as much information as possible, not to lead the discussion in a particular direction.

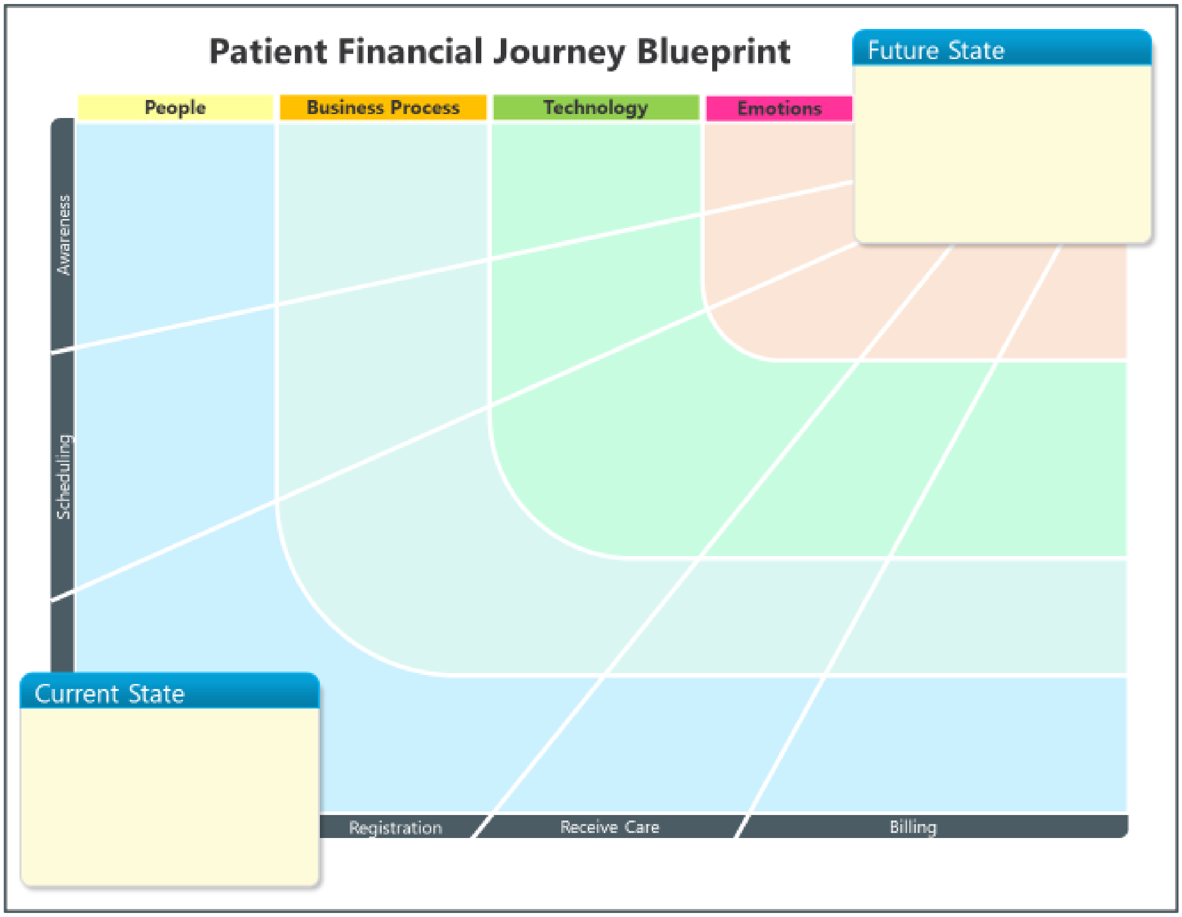
It may take a few hours, or even a few sessions to collect everything. Once you have, you should have a detailed map of the current state of how you do business. Most importantly, it will be from the perspective of how your customer, the patient, is experiencing your services.

Analysis and Blueprinting

Soon after the Patient Journey Mapping session is complete, you will want to compile the information and create a summary. This summary should be a high-level view of the current state of how you do business. Try to keep your summary to 5-8 bullet points. From there, your team can create a desired future state. Again, keep your future state high level and limited to 5-8 bullet points.

With a clear understanding of your current state and a focused articulation of your desired future state, you can build a blueprint of how to get from one to the other. Like any good blueprint, the document should show you how to build your desired future state. You should break the blueprint into the same categories as we did during the data collection. Then, in each category, list what projects/changes need to happen for each functional area of the project.

When detailed in each area, you should have a single-page document that shows where you are today, and the steps needed to get to your desired future state.



Get to Work

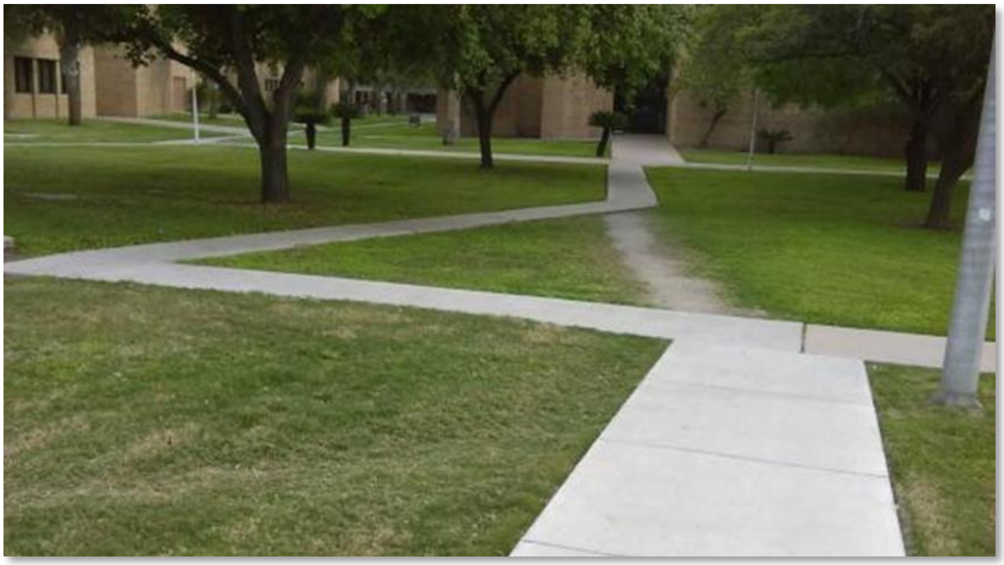
Now that the blueprint is complete, you have the 'talk track' that Jeanne Bliss described. That single, one-page document should have all the key points you and your teams need to get from where you are today to your desired future.

Some changes may be quick and inexpensive; others may take a significant investment in time and money. But as you use the blueprint as your unifying guide, you will see your team operate with a shared vision of where you're going. You will see change come quickly to your health system as your leadership team bases their decisions on what moves them closer to that desired future state.

As you get to work, there are two final tips to keep in mind:

1. Your patients intimately know the positive and negative components of receiving care from your organization. Involve them in the changes and seek their input and feedback regularly. As you align your resources with their preferences, you will find some surprising and powerful synergies.

2. Like the trail in the picture, sometimes your best intentions of creating a great experience for your customer still result in a muddy dirt path. Although some landscape designer thought that this layout for the sidewalk was best, their customer's experience was still a dirt path. As you work on any patient experience projects, be sure to create return and report mechanisms so that you can ensure the changes you are making have the intended outcomes.



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Need help creating meaningful patient journey maps that can be the catalyst for change?

Contact us below to learn more about our patient journey map services.

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