Don’t Waste Money on a PRM

Ensuring Your PRM Creates Value

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The Role of Physician Relationship Management Systems (PRM)

Physician Relations programs are primarily responsible for improving the referrer experience through in-person relationship building, conveying persuasive and clinical communications, and facilitating the referral process. The physician relationship management strategy is generally driven by the challenges of evolving expectations and meeting those – around referral decision making, patient access processes, clinical communications about their patients and the ongoing coordination of patient care following treatment and return to the community – so having robust IT solutions is critical.

However, in many organizations, the technology solutions deployed are inadequate and the deployment fails. The primary reason most of these deployments fail: They are simply a repository for documenting simple tasks. PRM failures occur when the IT solutions only serves to document activities, such as the number of physician office visits, type of print materials distributed, requests for information and logging of complaints.

What’s paramount in this work is that any off-the-shelf solution is customized to meet to make resulting workflows (e.g., outreach, marketing, sales) more efficient and effective. The PRM should support the ENTIRE physician relationship management program, not just select pieces. Best practices show that those organizations which link business objectives to strategy and tactics are more likely to secure resources and remain competitive.

Furthermore, best practices in Physician Relationship Management (PRM) deployment demonstrates that it’s critical for the system to engage other stakeholder groups such as IT, Finance and Operations. High performing physician relations organizations are continuously supported by these functional groups to meet the needs of the referring physicians. These groups works together to integrate relevant data to demonstrate the value of the relationship, identify opportunities for service recovery, and make the referring process as beneficial as possible to the referrer.

In this white paper, we will review the process for successfully optimizing and deploying physician relationship management system (PRM).

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Define the Functional Role of the PRM System

Our collective experience in designing and implementing PRM systems suggest there are 4 key four key functional roles for a PRM. Those four roles involve planning, data management, feedback and outcomes (ROI). We describe how the PRM system is supportive across each major role. Consider these a checklist of what do look for and/or customize in your PRM solution:

Strategic Physician Outreach Planning

- Contributes to the development of data driven physician relationship management strategies that support the clinical growth goals of the organization.
- Provides relevant data and metrics to validate strategy development and to ensure alignment with organizational priorities.
- Facilitates the design and development of physician outreach territory plans by assembling geographic data from internal and/or external sources and applying mapping software to create territory maps.
- Enables the integration of external sources of physician market-based information that will allow the team to make recommendations that drive referral development strategy.
- Provides the capability to perform comprehensive analysis (to include qualitative and quantitative approaches) of physician referral patterns, characterize referral practices to identify "splitters" and to extrapolate potential hotspots for referral development.

Physician Database Management and Communications:

- Supports, via a Data Management Plan, the analytic technique(s) necessary for collecting, preparing and cleaning data before and/or after it is entered into the Physician Relationship Management System.
- Integrates the design and configuration of the physician database, physician data requirements and the queries and reports (e.g dashboard) required by end–users and departmental and organizational leadership.
- Streamlines the process for monitoring and maintaining the quality of data collected and utilized in physician outreach reporting, analysis, research and planning activities.
- Provides the necessary IT infrastructure for maintaining the quality and integrity of referring physician information that facilitates communications, coordination of care, and connectivity of physician outreach activities to resultant referral activity.

Problem Resolution and Service Recovery Processes:

- Supports the data and metrics needs of service line programs and initiatives where the physician outreach team is involved, aimed at improving processes and operations that support referring physician interactions and relationships with the organization.

- Provides relevant data and metrics to monitor and sustain implemented process improvements.
- Organizes access to information that supports the analysis and reporting of physician feedback to physician outreach, hospital / clinical management and other identified key stakeholders.
- Provides data and analytical input for management and clinical staff in resolving problems identified and supporting service recovery efforts.

Performance and Outcomes Measures:

- Provides a data-driven structure, process and comprehensive approach for measuring the impact and value of programmatic activities conducted by the physician outreach team.
- Produces reports and dashboards for tracking activities, and provides integrated communications process for distributing, communicating and educating staff and leadership across the organization about physician related referral data.

Identify the Internal/External Stakeholders of the PRM System

With a thorough understanding of the role and purpose of the PRM system in mind, and before embarking on a PRM initiative, it is important to consider who will be the primary users of the PRM system and what type of physician relationships do you need to support. These examples are not all inclusive, depending on your program, your organization and your referral base there are likely other relationships and customers that should be included and can be supported by the PRM.

Examples of referrer relationships that can be supported by the PRM System:

- Current and Potential Referring Physicians – all specialties
- Mid-level providers, physician assistants and hospitalists
- Medical staff relationship management / credentialing
- Practice based referral specialists
- Primary Care Practices / medical groups
- Health Plan Medical Directors
- Corporate Medical Directors – Employer Relationships
- Members of the behavior health provider community

Potential users of the PRM System:

- Physician Liaisons
- Patient and Physician Access Staff
- Call centers
- Physician relations leadership
- Clinical, Operations and Finance leadership
- Faculty

Examples of PRM Functional Requirements:

- Integrated mapping and route development application
- Calendaring and scheduling
- Ability to document and track expenses
- Clinical system integration – view only / referral status / problem resolution
- Physician Master Database Management – ability to consolidate multiple physician databases to include employed, affiliated and non-affiliated / referring providers
- Physician e-detailing capabilities
- Referring Physician Survey and feedback processes
- Data and Dashboarding capabilities to support Outcomes Research, Return on Investment and Return on Relationship analyses
- Social media integration
- Ability to access the PRM from multiple device formats (mobile phones, tablets, desktop computers).

Establish Your Options

It is important to have a well-planned and structured process, from selection to training. In our experience we have encountered examples of PRM systems that were brought into the organization where the primary end users (physician liaisons) were only provided with minimal basic training to enter date into the system, but not provided instruction on how to utilize the system more efficiently and effectively in order to optimize the value that the system can bring to their role. Thoughtful consideration should also be centered around how the PRM will be supported and maintained and kept up to date after implementation.

A best practice approach for bringing a PRM system into your organization should include the following key steps:

- <u>Decision making</u> – Define how your organization's process for IT decisions will be applied ot the PRM. This process will likely involve how you request, gain approval and achieve prioritization for your PRM initiative. You should be prepared to use a set of criteria for assessing the need and describing the business case for a PRM or an improvement to your existing system.
- <u>System/vendor selection</u> – Work in collaboration with IT and other key stakeholders (may include service line and areas such as finance and operations) to develop a set of functional requirements for the PRM, draft a request for proposal, identify potential PRM vendors, host vendor demonstration sessions and conduct site visits with existing users of the PRM system. Consider the ecosystem of support that may be available to you and the ownership of the system – will you to be able to switch vendors?
- <u>System acquisition</u> – Develop criteria for scoring / rating the vendors across stated functional requirements in order to provide a quantitative comparison and ranking of the

reviewed PRM systems which in turn provides basis for determining the vendor of choice and initiating the contracting process. Assess to the degree to which deployment schedules are realistic and budgets are described and well-constrained.

- System Implementation / training – Installation and configuration of PRM software, hardware (if applicable) will be handled by vendor and IT staff. This process should include full system testing (e.g., user acceptance testing) before go-live to ensure that the PRM is working properly and that all installed functional requirements are performing as expected. End user training should include basic system training but also outline continuing education beyond the basics in order to optimize value of the PRM and contribute to keeping end users current with best practices for working with the new PRM system. Determine what is new development and what process is being used (e.g., agile development). Ask questions regarding how much configuration is allowable in the timeframe.
- System support, maintenance and enhancements – During the system acquisition / contracting process, all ongoing support and maintenance requirements should be clearly defined and documented to include who will perform (vendor vs. organization staff), what the costs will be and over what period of time, as well as defining the process for how system updates and enhancements are delivered. Determine, again, what level of commitment is required to one vendor versus accessing the entire ecosystem of developers/support which may be available to you elsewhere.

Gain Alignment for Successful Deployment

In order to ensure a successful PRM customization and deployment process, a cross functional project team should be formed. Key stakeholders from IT, Finance, Physician Relations / Marketing / Business Development should be engaged. Depending on your organization you should also consider including medical staff as well as operations, particularly from patient access / call center teams. Those involved with the project team will be required to perform a variety of services needed to successfully implement the new PRM solution and for providing support to meet overall physician relations expectations, referral management as well as business requirements. Such services may include, but are not limited to:

- Formulating and defining project scope and objectives based on referring physician, physician practice staff, physician relations specialist, patient access staff and faculty user needs as well as business objectives.
- Devising or modifying procedures to solve complex problems considering computer equipment capacity and limitations, operating time and form of desired results.
- Analyzing and when necessary, revising existing system logic and documentation.
- Preparing information for project presentations, including those intended for an executive level audience.
- Coordinating the project in a manner that includes research, planning, executing, and managing efforts across projects and between various organizational units including coordination with various technical teams.

- Translating customer (i.e. referring physician, business, clinical, etc.) requirements and objectives into PRM functional requirements.
- Maintaining quality standards and assuring that project deliverables meet stakeholder requirements and objectives.
- Ensuring that project documentation is maintained as the project is changed or refined over time. Coordinate with the various project stakeholders on necessary documentation.
- Development and coordination of modifications to the PRM system, including any updates based on user needs, changes or refinements.
- Ensuring that all internal and external standards and regulatory requirements are met (e.g. HIPAA).

Project team participants also must have demonstrable experience in the following key aspects of PRM design, implementation and support:

- Process redesign as needed to best support the PRM solution.
- Understanding what is needed to enhance the physician experience, including the creation and analysis of physician focus groups or survey processes.
- Ability to create and engage cross functional teams to determine functional needs and lead system design and configuration.
- Validation of IT system designs to ensure functionality and processes meet objectives, including the creation or analysis of user testing methods. Facilitation and coordination of related projects that affect the overall user experience, as it pertains to the PRM solution.
- Experience with staff- and physician-centric technology including web portals, customer / physician relationship management (CRM/PRM) systems, mobile solutions, electronic medical records and social media.

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Taking Action

Identifying, selecting and implementing a Physician Relationship Management (PRM) system can be a highly valuable tool for improving the effectiveness and operational efficiency of your Physician Relations efforts. Bringing the right system, at the right time, and in the proper manner will enable the structured documentation of Physician Relations activities from office visits to feedback and problem resolution, to outcomes monitoring of newly generated physician referrals and their associated revenues. From a strategic perspective, an optimized PRM solution will provide your organization with the knowledge and understanding of your physician referral base that will facilitate improvements in referring physician satisfaction, enhancements to your organization’s reputation with a critical customer group, and extending your team’s ability to attract patients to priority service lines.

For more information about engaging and building relationship with referring physicians, please see the following resources:

Physician360 Demo

Embracing your Evolving Role in Referring Physician Engagement

Physician Marketing Planning

Using KPIs in Physician Relationship Management

SMART Physician Relations Benchmarking Tool – Free Online Survey and PDF Report

About Endeavor Management

Endeavor Management is a management consulting firm that leads clients to achieve real value from their strategic transformational initiatives. We serve as a catalyst by providing the energy to maintain the dual perspective of running the business while changing the business through the application of key leadership principles and business strategy.

In 2012, Gelb Consulting became an Endeavor Management Company. Our combined experience (Gelb founded in 1965) offers clients unique capabilities to focus their strategic initiatives with a thorough understanding of customer needs to drive marketing strategies, build trusted brands, deliver exceptional customer experiences and launch new products. Our experienced consultants and analysts use advanced marketing research techniques to identify customer needs and spot high potential market opportunities.

The firm’s 40 year heritage has produced a substantial portfolio of proven methodologies, enabling Endeavor consultants to deliver top-tier transformational strategies, operational excellence, organizational change management, leadership development and decision support. Endeavor’s deep operational insight and broad industry experience enables our team to quickly understand the dynamics of client companies and markets.

Endeavor strives to collaborate effectively at all levels of the client organization to deliver targeted outcomes and achieve real results. Our collaborative approach also enables clients to build capabilities within their own organizations to sustain enduring relationships.

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