Choosing a CRM Solution:
What Your Healthcare Organization Needs to Know

Introduction

There has never been a more urgent time for healthcare organizations to determine how to compete in a value-based, patient-centric industry while reining in costs. In order to thrive in this changing healthcare environment, many organizations are turning to customer relationship management (CRM) solutions for the first time or even replacing existing CRM systems in order to better operate and grow.

Gathering the information necessary to evaluate a healthcare CRM solution takes time and effort away from other business activities, which is why we have compiled a guide that can help expedite the evaluation and selection process.

Why your healthcare organization needs a CRM

With data spread across various silos, solutions, and spreadsheets, healthcare organizations need a way to seamlessly integrate, analyze, and act upon important metrics. Healthcare CRM platforms are extremely customizable and can be used to streamline multiple areas of an organization, from sales activities to client and patient relationships to the referral process. With a healthcare CRM in place, your organization will be able to:

Automate internal workflows to increase efficiency.
From instant notifications for sales reps to real-time updates for customer service teams, automated workflows make it easier to do business.

Monitor utilization rates to decrease costs.
Tracking internal operations like blood or test utilization helps pinpoint where waste is occurring, identify the root cause of issues, and quickly resolve problems.
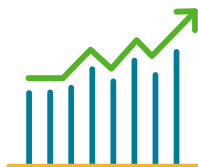
Leverage real-time analytics to increase revenue.
Monitor quality metrics such as turnaround times, reimbursement rates, and patient readmissions to ensure you're always trending in the right direction.

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The benefits of a healthcare-specific CRM solution

With so many generic, industry-agnostic tools on the market, healthcare organizations should be aware of the features that indicate a built-for-healthcare platform. Healthcare-specific platforms allow organizations to:

See value in weeks, not years.
In order for a technology investment to be truly worth it, a healthcare organization must be able to derive value as soon as possible. With a built-for-healthcare solution, organizations can get up and running in days or weeks, not months or years, because there is no need for extensive configuration or data mapping.

Stop wasting money on custom configurations.
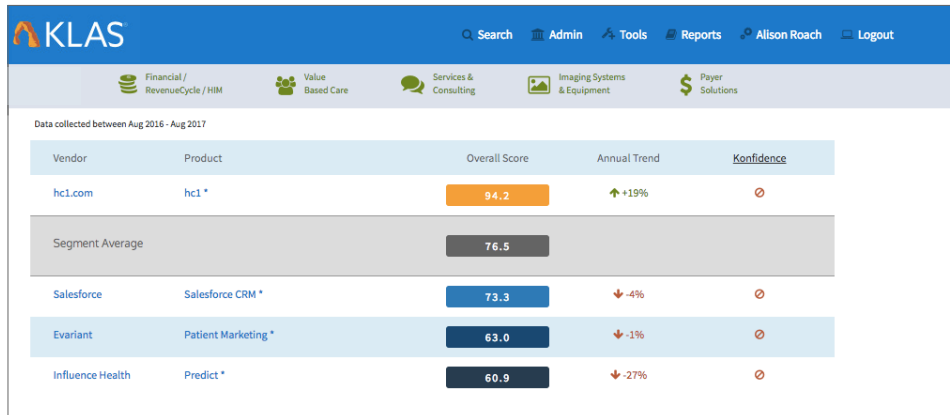Generic CRM platforms often sound like a cost-effective option, but that's before the nickle-and-diming that often results from custom workflows and configurations. Healthcare-specific CRM platforms are pre-built with these custom workflows, making them significantly more cost effective.

Start using new features faster.
With streamlined integrations between a cloud-based healthcare CRM platform and other healthcare tools (LIS, EMR, etc.), new features and product enhancements are quickly delivered and ready for use, without any lag or downtime.

Leveraging third party research to make a decision

Independent research can serve as an invaluable tool when evaluating a healthcare CRM. Within the healthcare IT space, KLAS Research, Garter Research, and Frost & Sullivan are well-known third parties that compile and compare category innovators and leaders.

KLAS, for instance, bases its healthcare CRM category rankings on feedback from actual end-users who can speak to their real world experiences with a given solution. Ease of use, implementation and training, sales contracting, and support and service are key areas that users rate vendors for, which are then aggregated to an overall vendor score (100 is a perfect score).

Gartner, on the other hand, is known within the healthcare industry for its Hype Cycle Reports, profiling leading vendors in categories such as Patient Engagement & Persuasion Analytics.

Frost & Sullivan's research takes a more in-depth look at leaders within certain sub-segments of healthcare CRM, such as the North American Diagnostic Laboratory Product Leadership Award, based on product family attributes and business impact.

Critical questions you need to ask

As you're evaluating potential CRM platforms or sending out RFPs, it's important to know the right questions to ask. Just because a CRM solution pushes certain features or uses a particular vernacular doesn't mean it can actually provide adequate functionality. Here are some important questions to ask when evaluating prospective CRM providers:

- **What are the specific security measures in place to protect healthcare data?**

- **Is the platform HIPAA-compliant?**

- **How does this platform handle integrations, such as LIS, EMR, billing, etc.?**

- **How long will this platform take to activate or implement?**

- **Does this platform require multiple customization fees or ongoing charges?**

- **Can various teams across my organization use this same platform?**

- **How can this solution make an organization-wide impact?**

- **Can my team grow and continue to innovate on this CRM platform?**

- **What other organizations similar to mine are thriving on the platform?**

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Activating a healthcare CRM

Once you've completed your research, evaluated the various solutions on the market, and selected a solution, it's time to activate your new CRM platform. For healthcare organizations with countless other tasks at hand this may sound daunting, but with the right strategies in place, your team can get up and running on your new CRM platform quickly. Tips to keep in mind during this process:
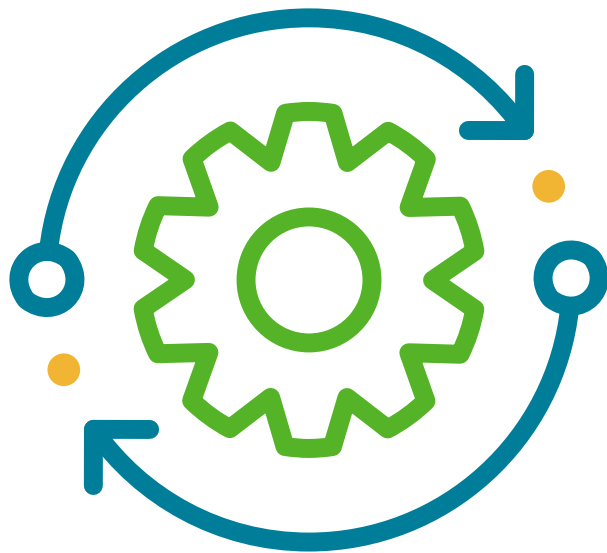
Set clear objectives.
Make sure you and your vendor partner know why you decided on the platform and what you hope to achieve after activation.

Narrow your focus.
Don't try to do everything at once. Narrow down your objectives to the top two or three initiatives immediately following activation.

Facilitate open collaboration between teams.
Keep stakeholders apprised of the process to ensure your strategy roadmap is successful from the get go.

Set up a process for change management.
Determine who the gatekeepers will be to keep your platform activation process moving along quickly.

Involve the right people from the onset.
Ensure that subject matter experts have been identified for each of the teams that will be using your new solution.

Tips for continued innovation

After activating your solution, you'll want to ensure that your team is ready to derive value and build upon its early success. Here are some quick tips to activating and gaining momentum with your new solution:

Make sure you're sharing the value of your solution.
If your organization originally decided on a CRM platform to help boost incoming referrals and have seen measurable success, share this story with executives and others across your organization.

Ensure users know exactly what to do to achieve the best results.
Work directly with your CRM provider and in-house leaders to increase education and industry knowledge via in-person and/or on-demand training

Begin benchmarking your success.
One of the best things about a cloud-based CRM platform is that historical data is collected and archived for continuous benchmarking and feedback. Healthcare leaders can measure output levels against past numbers to ensure the business is making progress.

Conclusion

For any healthcare organization seeking to streamline internal operations, increase revenue, and optimize efficiency, a healthcare-specific CRM is the answer. With this platform in place, healthcare leaders can develop targeted strategies and workflows that directly impact the customer and patient experience. With the customer at the forefront, healthcare organizations can rise above the competition and thrive in the era of value-based care.

For more information on healthcare-specific CRM solutions visit: www.BestHealthcareCRM.com, where you can see exactly how various CRM platforms stack up against each other. Ready to see the #1 rated healthcare CRM platform in action? Schedule your demo with hc1.com today at www.hc1.com/crmdemo.

About hc1.com

The hc1® Healthcare Relationship Cloud® includes a healthcare-specific CRM that enables health systems, diagnostic labs and post acute care organizations to grow profitably and deliver amazing service.

Over 1,000 healthcare organizations across the globe rely on the hc1 CRM platform, including Cleveland Clinic, Alere, Nationwide Children's Hospital and Sonic Healthcare.

KLAS CATEGORY LEADER
SOFTWARE & SERVICES
2017

#1 Rated Healthcare CRM by KLAS Users

According to hc1 healthcare CRM users surveyed by KLAS research:

- **100% of hc1 users surveyed by KLAS say, "they would buy hc1 again"**

- **100% of hc1 users also say that the hc1 platform is "a key part of their long-term plans"**

- **The healthcare CRM user community has rated hc1.com 20% better than all category competitors**

- **hc1 has a KLAS score of 94.2/100, over 20 points more than our closest competitor**

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