



Patient Relationship Management:  
*An Approach that Improves Patient Satisfaction and Health*

A Healthcare White Paper

**Microsoft®**



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It's nearly impossible to go a week without seeing a top news story about alarming increases in the rates of chronic diseases or the need to increase focus on disease prevention. Clinicians are realizing that managing long-term patient relationships can help curb the climb of chronic disease and improve patient satisfaction and overall health.

*A man with heart disease gets admitted to a hospital for an emergency procedure to unblock his clogged arteries. A year before, his physician advised him to cut down on saturated fats and decrease his stress. Aside from sending him home with a few pamphlets, his physician had no easy or structured way to help the man stay on track through frequent follow-up. The result: a costly emergency procedure that might have been prevented.*



*A woman with a broken leg needs follow-up care from a home-health nurse, a physical therapist, an orthopedic surgeon, and a social worker. She is sent home from the hospital with several numbers to call. Her discharge planner easily schedules one follow-up call to be made by someone in her hospital, but the discharge planner soon gets lost in a maze of manual attempts to ensure clinicians and case workers in other facilities are scheduled and prepared to assist with the woman's recovery. The result: a discharge worker frustrated with system limitations, several clinicians and case workers wasting time sending faxes or making call-backs, and a patient whose recovery is marred by a series of stressful interactions with multiple healthcare and social services providers.*

# The Challenge of Reactive, Disconnected Healthcare

For anyone working in healthcare, these scenarios are all too familiar. While clinicians strive to proactively address their patients' overall well-being, they are hindered by time-intensive, manual processes or disconnected systems that make managing patient relationships a challenge.

## Reactive, Disconnected Healthcare



Current systems make collaboration and care coordination a challenge.



Clinicians treat episodic symptoms instead of managing relationships to focus on prevention and overall well-being.



Patients are confused by disconnected processes across organizations.

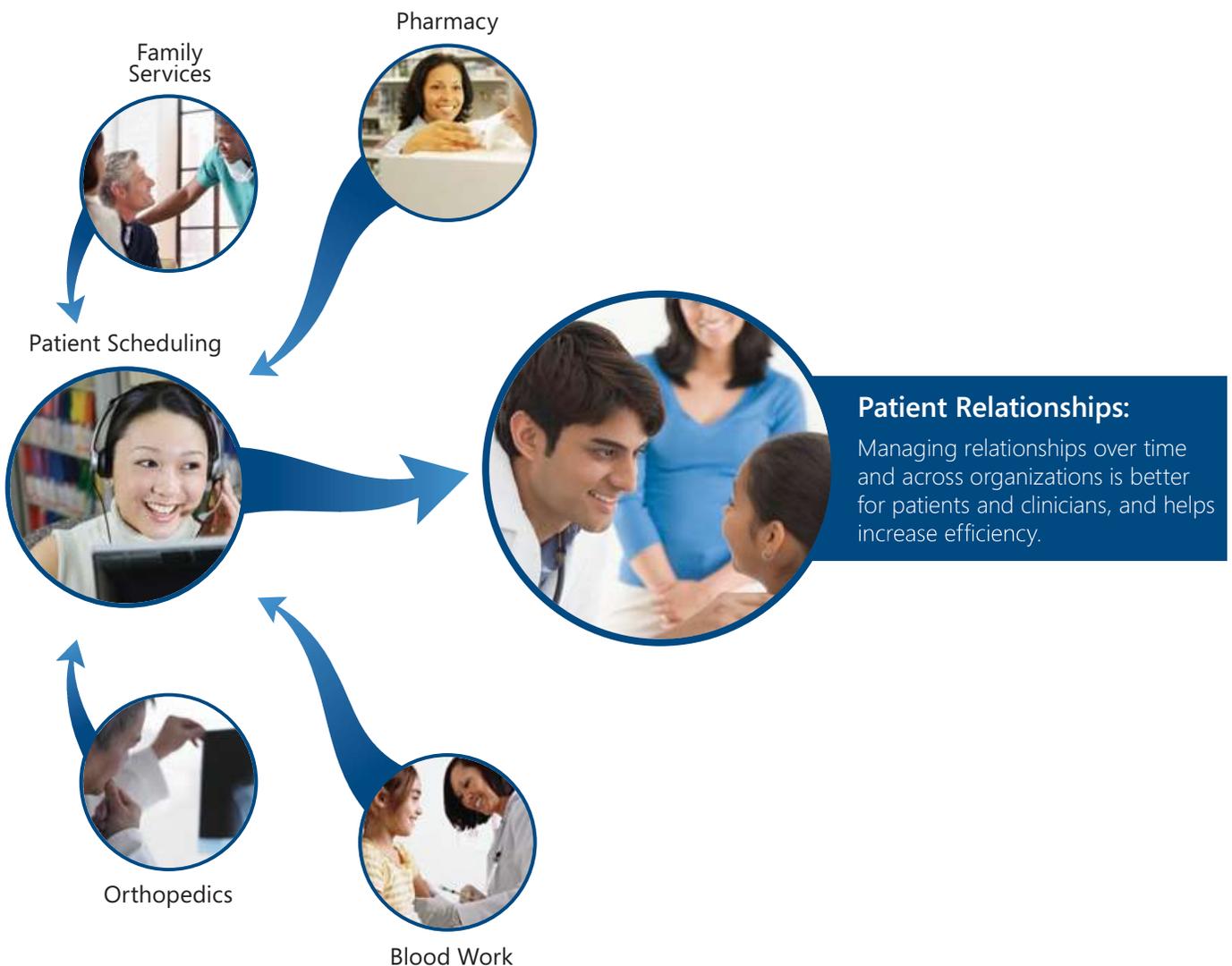


In addition, increased pressure to contain costs has put an even greater strain on IT budgets, making large-scale system overhauls out of reach for most healthcare organizations. More and more, healthcare IT professionals are looking for ways to make improvements through incremental updates to existing systems.

# Patient Relationship Management: An Approach That Improves Patient Health and Satisfaction

For many years, commercial businesses have realized the benefits of deploying CRM (customer relationship management) systems that help them build long-term customer relationships. In turn, consumers have grown accustomed to dealing with businesses that proactively understand and serve their needs. Through automated systems based on the concepts of loyalty and relationship-based marketing, consumers have grown to rely on helpful follow-up communications based on their preferences, or recommendations for books, music, and other goods that people with similar preferences have enjoyed.

Similar concepts can be used to establish patient relationship management systems in healthcare organizations. With such a system in place, clinicians can establish ongoing relationships with their patients, enabling them to increase focus on prevention, and giving them a new tool to help improve patient well-being and satisfaction.



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## Patient-centric care is about:

- Ongoing relationships
  - Education
  - Prevention
  - Overall well-being
- 

### In patient-centric organizations:

- Clinicians establish ongoing relationships with patients that increase focus on education, prevention, and overall patient well-being.
- Patient care is better coordinated across departments and organizations, helping to decrease potential gaps in care and increase patient satisfaction.
- Instead of requiring patients to conform to each department's unique procedures, processes are streamlined from end-to-end to be more convenient for patients.
- Clinicians have access to and can securely share information and resources that can help patients better manage chronic diseases.

Several factors make the timing right for healthcare organizations to adopt patient relationship management solutions.

#### **INFORMATION EVERYWHERE**

With the pervasiveness of health-related information available through the Internet, television, magazines, and newspapers, patients are more informed. They're starting to take a more active role in their healthcare. They're conducting self-directed research on symptoms and alternative treatments and are more engaged in proactive dialog with their physicians.

#### **PATIENT EXPECTATIONS**

In the past few years, patient satisfaction and safety top the list of priorities for healthcare IT leaders, according to the Healthcare Information and Management Systems Society (HIMSS).<sup>1</sup> Reducing errors and streamlining processes are keys to increasing patient satisfaction. In addition, more healthcare organizations are taking a cue from the private sector by putting the customer—in this case, the patient—at the center of service-oriented process improvement efforts.

#### **THE PROMISE OF PREVENTION**

Despite the lack of a widespread shift to operational and reimbursement systems that encourage preventive versus episodic care, forward-thinking healthcare organizations are striving to realize the benefits that continued focus on clinical prevention may provide. In a World Health Organization global report on disease prevention, several types of clinical intervention methods are cited as reducing death and disease and improving the quality of life of people at risk of, or living with, chronic diseases. Notable methods include supporting patient behavior change, the use of pharmacological agents, and surgery. One example—a combination of drug therapy (aspirin, diuretic, statin) for people with an estimated overall risk of a cardiovascular event above 5 percent in the next 10 years—was shown to be very cost-effective in all regions by the WHOCHOICE project.<sup>2</sup>

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1 HIMSS News Publication: Patient Satisfaction, Safety, Electronic Records Top List of Healthcare Priorities—from 17th Annual HIMSS Leadership Survey Results; February 2006

2 Preventing chronic diseases: a vital investment: WHO global report; World Health Organization 2005

## Current Healthcare Technology Environments Pose Challenges

As much as clinicians and healthcare industry leaders want to adopt patient relationship management systems to help increase the focus on proactive, coordinated care, they're hindered by outdated, disconnected technology environments. The following are challenges healthcare professionals in hospitals, clinics, long-term care facilities, and home health settings face on a regular basis.

- **Coordinating care across entities is challenging.** Although many healthcare organizations have automated processes and electronic medical records, their technology “stops at the front door.” When a patient is referred to a physician in another clinic, manual phone or fax communications between organizations are typically needed, which adds to clinician workload and often requires patient involvement. In addition, conflicting or misunderstood processes across organizations can sometimes result in delays or gaps in treatment.

Systems that enable e-mail-based communications, automate follow-up activities like appointment scheduling and information sharing, and integrate processes across organizations can help with care coordination.

- **Proactively managing relationships with chronically ill patients is difficult.** Clinicians understand that patients with chronic illnesses, such as Diabetes or heart disease, can benefit from frequent educational communications and helpful reminders. However, the lack of widely available, easy to use systems that automate tasks—such as scheduling follow-up calls, developing and distributing targeted communications, and efficiently responding to questions—makes managing ongoing relationships difficult.

Systems that automate relationship management tasks can help clinicians manage ongoing patient relationships.

- **Streamlining processes to improve patient satisfaction is complex and cumbersome.** A big component of patient satisfaction is the ease of interactions with professionals and procedures in the continuum of care. Improving discrete processes within one department is doable. When process improvement requires collaboration and information-sharing between departments and entities, things often fall through the cracks, leaving patients confused and frustrated.

Systems that enable process workflows to be analyzed and customized across departments and organizations can help streamline processes and improve patient satisfaction.

- **Managing ongoing patient communications is difficult.** Typically, follow-up communications between clinicians and patients are possible only when nursing aides or administrative assistants are available to make calls or send letters. For most healthcare organizations, clinical and administrative staff is limited and ongoing communication relies on persistent patients or heroic clinicians.

Systems that automate ongoing communications without adding administrative burden can help improve follow-up.



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CRM solutions are designed to help organizations manage relationships based on customer needs

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- **Outreach is inefficient.** Targeted outreach that can help educate and engage community members and financial donors is tedious to complete. Without systems that help narrow mailing lists to interested audiences, broad, non-personalized mailings have little impact. When interest is generated, there are rarely resources or systems available to follow up on responses.

Systems that facilitate cost-effective outreach communications, track responses and automate follow-up activities can help engage community members and strengthen donor relationships.

- **System overhauls are unrealistic.** Replacing existing systems has long been perceived to be the best solution, primarily due to the lack of alternatives. Large-scale system overhauls can take two or more years, which puts them out of reach for many organizations.

With the emergence of software packages that utilize Web services, enabling patient relationship management through incremental improvements is becoming an attractive alternative. While some may choose to develop customized Web-based solutions that link patient-facing services with records management, billing, and other systems, others are turning to commercial “off-the-shelf” software packages to bridge gaps and extend current systems.

Implementing commercial software packages offers several advantages, including:

- Lower cost than replacing or upgrading existing systems
- Ability to spread expenses over time because discrete functionality can be implemented in a phased approach
- Less burden on staff because software can be customized to map to current processes
- Reduced risk because incremental changes are easier to manage
- A well recognized look and feel that makes systems easier and safer to adopt

## Commercial CRM Solutions Offer Promising Alternatives

Healthcare organizations seeking to offer patient-centric environments are driven by the desire to increase focus on patient satisfaction, prevention, quality of care, and patient well-being. Because customer relationship management (CRM) solutions are designed to help organizations manage relationships based on customer needs, health organizations are beginning to choose them to help improve their patient satisfaction and meet process efficiency goals.

Essentially, a CRM package can connect existing systems and processes, provide easy access to information, and enable ongoing clinician-to-clinician conversations and patient-to-clinician relationships focused on illness prevention and improved health.

# Using CRM to Manage Patient Relationships



The illustration above shows how a CRM application can be customized to enable patient relationship management within health organizations. Taking a patient relationship management approach, healthcare providers can move beyond treating episodes of illness to enabling proactive care by establishing productive, long-term relationships with patients. Patient relationship management systems can:

**Increase patient satisfaction.** By analyzing the performance of routine processes over time (such as admissions, discharges, transfers, and referrals), improvements can be made to eliminate unnecessary steps and increase patient satisfaction.

**Coordinate the delivery of care.** Customized workflows can be developed to automate care coordination activities between provider organizations, which can help improve patient outcomes while increasing operational efficiency and reducing costs.

**Proactively manage chronically ill patients.** Clinicians can flag patients with specific chronic illnesses and automate targeted, proactive communications to inform them of upcoming educational offerings and remind them of ways to manage their illnesses.



**Improve community relations.** Targeted outreach campaigns can easily be developed and sent to community members to promote new services and educational offerings, or to donors to update them on fund usage or fund-raising campaign progress. Relationship management tasks and communications with community members and financial donors can be automated to increase efficiency and improve results.

With healthcare costs on the rise, managers continually strive to streamline processes and make the best use of resources. With patient relationship management applications, health industry leaders can:

- Analyze process improvements and their impact on patient satisfaction
- Facilitate increased patient-clinician interaction without adding additional administrative burden
- Increase community outreach focused on education, illness prevention, and overall health
- Integrate and extend existing IT investments using a patient relationship management system to build automated workflows that bridge gaps and streamline processes across systems

## Microsoft Dynamics CRM Offers Unique Benefits

Microsoft Dynamics® CRM can help health organizations establish patient relationship management practices and proactive, prevention-focused care. Microsoft Dynamics CRM benefits healthcare organizations because it is:

1. **Familiar.** It enables reliable user adoption by working like and with familiar products clinicians may already use, such as Microsoft Outlook® and Office. If people don't use a system consistently, the system will have no value. The data within the system will be incomplete or out of date, and business processes simply won't execute consistently or correctly.
2. **Relevant.** It can be customized to fit the specific needs of healthcare organizations by providing a flexible user interface and the ability to easily update business processes and workflow. Every organization—no matter how large or small—conducts its process in unique ways. It may be in following specific patient safety procedures, or how they follow-up with particular patients based on medical condition.
3. **Flexible.** It is built on technology that is fast to deploy, flexible enough to adapt to changing needs, and built on dependable and affordable technology. This ensures that departments and organizations deploying the Microsoft Dynamics CRM system can have a fast time to value, a low total cost of ownership, and the flexibility to respond to their changing process and technology needs.

Clinicians aren't burdened with steep learning curves, because Microsoft Dynamics CRM works like and with other Microsoft products they're familiar with and already use on a daily basis. For example:

- Follow-up activities are tracked efficiently within Office Outlook, providing a familiar and intuitive work environment.
- Alerts tell clinicians next steps, remind them to send e-mails, and follow up on open items so patients get better care.
- Customized workspaces provide clinicians with personalized home pages allowing them easy access to patient information, along with relationship management and communication tools.
- Powerful reporting and analysis tools make it easy to identify process improvement opportunities at a glance.

The productivity enhancing benefits of Microsoft Dynamics CRM can help your healthcare organization strengthen patient relationships, increase focus on prevention and overall patient well-being, and improve patient satisfaction. When clinicians can streamline processes across departments and organizations to be centered on patient needs, patient satisfaction can increase. More important, when clinicians can rely on automated systems to assist them with ongoing, proactive communications, patients receive higher quality care which can improve their overall health, and clinicians are happier and more positive about their work.

## The Patient-Focused Future

*With a patient relationship management approach supported by Microsoft Dynamics CRM in place, ongoing relationships can be established between clinicians and patients that can increase the focus on prevention and help improve overall health. Patient care that crosses departments or organizations can be better coordinated, leading to increased patient satisfaction and well-being. Patient interaction processes can be analyzed and streamlined to better meet patient needs and increase efficiency. Convenient reminders can help automate follow-up activities and reduce administrative tasks.*

Clinicians strive every day to deliver high quality care and improve patients' health. Doing so with connected, intuitive systems can improve productivity while relieving the burden of tedious manual follow-up tasks. Gone are the days when costly, multi-year system overhauls are required. With the emergence of software packages, such as Microsoft Dynamics CRM, that provide the capability to bridge the gaps between healthcare systems, establishing patient relationship management systems that can help improve patient satisfaction is becoming a reality.

To learn more about Microsoft Dynamics CRM and Microsoft Dynamics solutions that can help your healthcare organization improve patient satisfaction and overall well-being, visit [www.microsoft.com/healthcare](http://www.microsoft.com/healthcare) or [www.microsoft.com/crm](http://www.microsoft.com/crm).

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The time is here for patient relationship management solutions:

- Patients want more
  - Clinicians are seeking improvements
  - Solutions are available
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Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems your company already has implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies, helping increase the productivity and effectiveness of your business, and helping you drive business success.

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