



The Provider Technology Playbook

How CRM+ AI+ Data+ Trust can help providers drive growth, increase innovation, and build a better patient experience.



Healthcare professionals are under increased pressure to deliver meaningful, personalized care despite a lack of efficient, agile, and scalable processes. Siloed data, disconnected teams, and a lack of modern technological tools make this a difficult, if not impossible, task. The disparate, legacy systems being used across the industry create inefficiencies and delay care. They force providers to spend valuable time hunting down data, toggling between screens (and systems), and manually entering and analyzing information. This is time that could (and should) be spent with patients.

To remain competitive in today’s environment, providers must have visibility into the entire patient journey. They need to be able to collaborate across care teams, unlock efficiencies, and accelerate innovation and access to care. This guide will explain how a health engagement platform can help providers connect patients and their caregivers, internal and external providers, enterprise EHR and emerging health tech companies in a trusted, privacy-preserving manner that promotes innovation, while also respecting the need for the safe delivery of care.

The end result? The ability to harmonize data, create a unified view, and truly activate the vast amount of information at their disposal.

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CHAPTER 01

Connect Systems

Providers need the ability to understand their patient’s health and life circumstances. They need a tool that unifies, organizes, and surfaces critical data so that it can be made actionable through tools like automation and AI. An integrated healthcare platform can help do this. It breaks down barriers between systems and software applications to give providers a 360-degree unified view of their patients. The ability to access all pertinent information in one central location unites teams, increases efficiency, and drives more effective overall care. It enables providers to share data across a range of teams and sources, including hospitals, pharmacies, laboratories, billing, and marketing departments. This facilitates cross-team collaboration, uncovers operational efficiencies, and ultimately, betters the patient experience.

53%

Cite lack of interoperability as a barrier to innovation.

Einstein Recommendation

Patient's medical record

Download

PDF

Symptoms

- None
- Muscle ache
- Headache
- Fever
- Injection Site Pain

Lifetime Warranty

Total Orders

CHAPTER 02

Enhance Personalization

Interactions with the healthcare system often occur at the most vulnerable times. People want their providers to provide personalized care, fast. To do this, providers need access to comprehensive medical records, the ability to collaborate with past care teams, and insight into a patient's circumstances.

A health engagement platform provides this view. It consolidates all clinical and nonclinical patient information onto a single console. This allows providers to pull up one screen and find all the information they need. Everything from diagnoses and medications to appointment history, wearable device data, communication preferences, and social determinants of health (employment, finances, housing, transportation, etc.) are easily accessible to everyone on the care team.

This level of visibility makes it possible for healthcare professionals to deliver personalized experiences at every touchpoint. It creates a deeper, richer patient experience. And it enables providers to deliver such an experience in a more efficient manner. It means agents handling patient inquiries already have information like past call history, diagnosis/conditions, upcoming appointments, and insurance info. They don't need to waste time asking patients to repeat this information.

This makes individual call times shorter, and frees up agents to cover more calls in less time. Doctors discussing care plans can see a patient's entire health history. They are aware of past treatments, clinical trials, and allergies to particular medications. This allows them to take patient circumstances into account, and devise treatment plans that are more likely to be adhered to. This type of care deepens the patient-provider relationship and builds trust. Perhaps more importantly, it powers care decisions that result in better health outcomes



94% of patients desire a provider who can give them a complete view of their health.

 SOLUTION SPOTLIGHT

Scale Patient Access and Referral Services

Improve experiences while fostering personalized service, streamlining triage, and connecting patients and care teams through the channels they want to use.

CHAPTER 03

Use CRM + AI + Data + Trust to Power Better Experiences and Outcomes

A health engagement platform can help organizations take advantage of both traditional and generative AI across a variety of practical applications. Because the AI is directly embedded into such a platform, things like next best actions, suggestions and prompts appear directly in the flow of work. This allows health organizations to turn insight into action, making for a more streamlined, efficient and data-driven operation. It means that healthcare professionals can do everything from organize workflows to summarize calls to generate forms from one screen, at the simple click of a button.

Ultimately, a health engagement platform powers real-time, personalized, omnichannel patient interactions, while still keeping people at the core of the experience. The AI built into a health engagement platform doesn't replace people. It makes them better. It assures that experienced healthcare professionals remain at all the right moments, empowered with AI knowledge and insights that increase satisfaction, decrease costs and enhance the overall patient experience.

Today's healthcare providers have more data than ever before. But data alone is not enough, providers need a way to make this information accessible and actionable. A health engagement platform harmonizes data and then integrates it with AI and CRM in order to power intelligent, innovative, and individualized healthcare at scale.

Bringing data, AI and CRM together on one trusted, centralized platform enables a health organization to not only know their patients, but to truly understand them. The platform unifies a multitude of data, both clinical and non-clinical, and then uses it to fuel powerful AI technologies.

AI's potential applications in health care are unlimited. From analyzing patient information like health history, demographics, and social determinants of health to predict health risks and intervene proactively, to guiding physicians toward more optimal treatments for their patients, to AI-driven supply chain optimization with the ability to predict demand, reduce waste and ensure efficient delivery to healthcare facilities. However, at present, the healthcare industry is only at the beginning stages of integrating AI into day-to-day care, with most of its current benefits being seen at the administrative level.



More than 66%
of healthcare and life sciences workers say
AI is important to their organizations future.

[Source](#)

CHAPTER 04

Coordinate Care Everywhere

due to lack of childcare. It can then alert the health care provider, so that virtual visits can be offered, negating the need for the patient to come in. The system can also surface important nonmedical factors impacting health outcomes. For example, it might flag a patient as housing insecure. Providers could then tailor treatment to that individual patient's circumstances (for example, not prescribing medication that requires refrigeration).

The ability to gain this kind of 360-degree unified view allows for more personalized, effective care. It ensures that providers are prescribing treatment plans with the highest possible chance of success. It also reduces the amount of lost time and money that accompany missed appointments, noncompliance, and human error. This not only betters health outcomes, it maximizes provider time and productivity.

It is rare that people have only one doctor, diagnosis, or health issue. This makes collaboration across care teams incredibly important to achieving the best possible health outcomes. Disconnected systems, the lack of an efficient way of communicating, and an inability to see updates made to a patient's chart in real time create barriers to care. These barriers not only waste time and delay treatment, but do a disservice to patients.

An integrated health engagement platform solves these issues by uniting teams and data in one singular location. It provides transparency into a patient's healthcare journey. Every member of the care team can login and gain access to things like medical history, current treatments, upcoming appointments, service center calls, patient preferences, and insurance information. It can also streamline care between different provider locations. This makes for more efficient and effective care.

The system also has the ability to integrate social determinants of health. This allows providers to treat the patient within the context of their lives. Designing care plans around a patient's life circumstances improves adherence to treatment protocol and betters chances of a successful outcome. For example, the system might pick up that a patient continually misses appointments.

**Social determinants
of health account for
up to 55%
of health outcomes.**

[World Health Organization](#)

 SOLUTION SPOTLIGHT

**Coordinate
Holistic Care**

Empower patients
and care coordinators
to achieve better
outcomes, faster.

CHAPTER 05

Engage Patients Meaningfully on Any Channel

Peoples' expectation for personalized care extends well beyond the examination room. Despite this, less than half of consumers receive the personalized treatment and support they crave. People want personally relevant communications, on the channel of their choice, at the time of day most convenient to them. Some may prefer to be contacted via text message, some might want email, or webchat, and others might prefer to pick up the phone, or receive information through the mail.

An integrated healthcare platform can capture these preferences. It allows providers to engage patients how, when, and where they want. Providers can proactively send messages about upcoming appointments, lab results, and wellness and disease-management programs. These communications improve patient satisfaction, promote care plan participation, and reduce costs. And because the process is automated, important

information is sure to be sent immediately, on the channel where the patient is most likely to see it. This is especially important in a healthcare environment. An hour or two can be make or break for a patient waiting on an organ donation, important surgery, or highly anticipated test result.

**Less
than 50%**

**of consumers receive
the personalized
treatment and
support they crave.**

[Connected Health Consumer
Report, 2021](#)

 SOLUTION SPOTLIGHT

Personalize Patient Outreach

Nurture patient bases and enhance brand reputation by engaging the target audience through multichannel, data-driven campaigns and journeys.

A note on trust:

AI is a powerful tool, however, human oversight is paramount in order to maintain trust and integrity. This is especially true in the health industry where decisions often amount to the difference between life and death, and the majority of patients (75%) express concern about protecting the privacy of personal health data. This makes a demonstrated commitment to integrity, privacy, and security paramount to maintaining trusted patient relationships. A health engagement platform with a secure trust layer makes it possible for health organizations to achieve this level of trust. Furthermore, it enables them to benefit from predictive and generative AI without compromising patient data.

CONCLUSION

Let's Get Better Together

There is nothing more important than health. But today's providers are in a tricky position. They must balance the needs and expectations of their patients with the reality of today's healthcare industry. Doing this requires they find a way to deliver personalized, patient-centric care in a manner that's also efficient, data-driven, and cost-effective. A health engagement platform is the key to meeting this challenge.

Salesforce's suite of healthcare solutions are designed to help providers deliver more personalized experiences, improve operational efficiencies, and become more agile in a competitive industry. Uniting systems allows us to seamlessly connect care teams, EHR data, researchers, and many other business workflows onto a single, secure, HIPAA-compliant, AI powered digital platform. This results in more satisfied customers, improved health outcomes, and business success.

See how an AI-powered health engagement platform and industry-specific solutions can help you and your organization streamline operations, meet patient expectations, and fuel a more innovative, data-driven future.

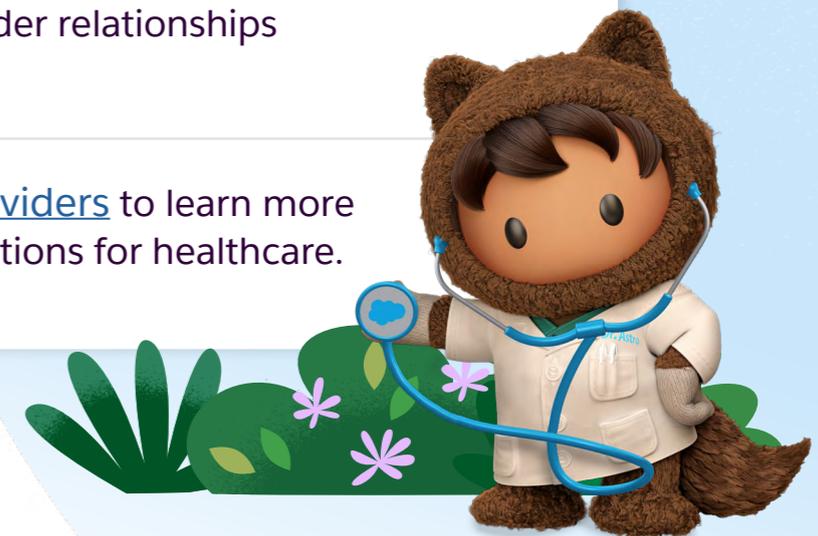
[LEARN MORE](#)

Provider Solutions

Deliver more efficient care and improve outcomes for your patients.

-  Scale patient access and referral services
-  Personalize patient outreach
-  Coordinate holistic care
-  Deliver health at home
-  Strengthen provider relationships and networks

Visit www.sfdc.co/providers to learn more about our curated solutions for healthcare.





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