Experience Management

Bringing the Voice of the Customer to Insights, Strategy Design & Execution
The experience provided represents some of the best opportunities to create patient loyalty. Delivering an exceptional experience in today’s complex and changing healthcare environment requires a disciplined approach and a deep understanding of customers.

1. Gathering relevant market intelligence to better target and segment the market
2. Providing a consistent, streamlined experience
3. Increasing reach and finding innovative ways to better engage patients and referring physicians
4. Equipping your team with insight & tools to grow advocacy and, ultimately, revenue
We appreciate the unique needs of healthcare brands. With much more at stake in every single interaction, understanding decision factors and aligning your experience to it is paramount. Our approach is based on our extensive experience working with many national healthcare brands.
SCOPE OF SERVICES

Building a Customer-Oriented Experience

Experience Management

For over 20 years, we’ve been using our proven approach to organize insight development, strategy design, and experience monitoring. We assess key needs, touchpoints, and experience stewards throughout the continuum of the journey.

- Patient Experience Management
- Physician Experience Management
- Donor Experience Management
- Healthcare Employee Experience Management
- Touchpoint Assessment
- Persona Development

Experience Strategy & Design

We guide your experience design and planning efforts, with a focus on cross-organizational collaboration and experience consistency throughout the supply chain. Our digital insights dashboards provide integration and easy access for monitoring customer experiences.

- Cross-Functional Workshops
- Healthcare Growth Playbook
- Health Brand Strategy
- Digital Insights and Dashboards

Implementation Excellence

Our team members have executive-level experience and expertise in executing planning efforts, cultural transformation, and cross-functional collaboration. We translate your insight and planning efforts into action.

- Strategic Planning
- Financial Analysis
- Revenue Cycle Improvement
- Operational Excellence
- Organizational Transformation
- Quality and Patient Safety
- Executive Transition
- Destination Medicine
PHILOSOPHY

Set, Met, Reinforced – The Key to Experience Management

We believe that culture and your brand promise are linked through the experience delivered.

Leaders translate customer expectations to the organization, assign priorities and reinforce expected behaviors.

We intentionally examine the differences between functional needs (what is done) with emotional needs (how patients feel about the interactions).

Alignment with expectations creates an exceptional experience and a sustainable competitive advantage.
PROCESS
The Continuum of Relationship Management

• Listening to establish a foundation for insights.

• Using insights to define the ideal experience and impart best practices.

• Collaboratively defining the promise and designing high priority initiatives.

• Delivery of the ideal experience to reinforce the brand promise and grow advocacy.

• Most importantly, our approach includes tools to allow you to monitor and repeat the experience management process and to support service recovery.
CONNECTING THE DOTS
Experience Management = Accelerating Revenue + Optimizing Business Performance
We organize all activities through the use of an experience map to examine the experience holistically.

The map frames the experience in terms of activities, key touchpoints, and touchpoint stewards. The experience map is customized based on audience (patient, physician, donor) and service area.
BENEFITS
Experience Management

- Brand Perceptions
- Decision Factors
- Marketing Channels & Touchpoints
- Outreach
- Referral Channel Performance
- Patient Communications

- Develop Empathy
- Identify Segment Needs
- Deliver the Ideal Experience
- Maximize Marketing & Outreach
- Align Marketing and Operations
BUILDING EMPATHY
Appreciating Different Types of Needs

Functional
- Awareness
- Accessibility
- Confidence in Care
- Care Coordination
- Follow-Up Care Planning

Emotional
- Respect for Time
- Inclusion in the Process
- Feeling Listened To
- Personalized Care
- Education and Empowerment
UNDERSTANDING
A Day in the Life

In-depth insight into what customers do, think, feel, and need during their experience.

For Each Stage of the Experience:

• Day in the Life - Current versus ideal
• Touchpoint analysis and prioritization
• Verbatim quotes and selected audio clips
• Detailed findings with rich quotes
Bringing to life key segments through examining descriptors, behaviors and needs.

**Personas Include:**

- Descriptors
- Behaviors
- Needs
- Opportunities
Our recommendations are developed and prioritized based on the findings, information review and our observations.

The Kano model shows how tangible customer needs, wants, and suggestions can be segregated into three separate requirement categories.
Design: Engaging Staff for Change

Our workshops facilitate cross-functional teams to create long-lasting outputs and maximize buy-in for sustainable change. We engage internal stakeholders around expected behaviors, process improvements, and communication and bring successful frameworks and industry knowledge to ensure a successful, additive outcome.

**Care**
Expected behaviors required to create lasting impressions

**Coordination**
Processes and technology to increase efficiency

**Communication**
Message mapping and communications at various touchpoints
WORK PLAN
We will work together to build a sustainable, transformative and effective implementation process

Envision
A clear vision of the future state
- Clearly define the desired end state
  - Envisioning workshops with senior leadership
  - Be CLEAR (Culture, Leadership & Employee Alignment Requirements)
  - Blueprint for future

Engage
The vision is translated into operational and organizational changes
- Enable leadership to lead the transformation
  - Change executive & champions trained in change leadership
  - Leadership alignment workshop with blueprint for the future
  - Change leadership coaching

Energize
The organization is motivated and mobilized to adopt the new design
- Communicate the vision to internal stakeholders
  - Build internal communications strategy and plan
  - Translate plan into Transformation360 progress dashboard
  - Build a communications feedback network

Enable
The infrastructure is in place to sustain the new experience
- Recognize and Reward
  - Showcase positive movements or changes
  - Showcase model behaviors
- Monitor and Measure Customer Perceptions
  - Pilot / Implement key elements of the ideal experience
  - Conduct facilitated observations
- Long-term Implementation Plan
  - Identify additional departments/units
  - Define the organizational process to implementing changes (competency transfer)
  - Define leadership messaging & performance management process

Compelling Business Case
- Success workshops (outcomes and benefits)
- Progress and results metrics/KPIs
- Financial and resourcing plan
- Governance Strategy & Plan
  - Run-the-business / Change-the-business priorities
  - Risk management strategy

Operational and Behaviors Redesign
- Expected behaviors workshop with front-line (emotional)
- Process mapping workshops with front-line (functional)
- Implement a cultural champions network (attitudes, beliefs, behaviors)

Experience Sustainability Plan
- Define new employee/team on-boarding process
- Define re-enforcement/refresh activities

Knowledge Transfer
- Rapid cycle through this process
- Adaptations for their specific needs
- Sync up the tracking with pilot

Long-term Sustainability Measurement
- Monitor plan, experience and feedback via Transformation360 dashboard

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We assess how your current practices relate to cross-industry standards for managing customer experiences. Our benchmarking, done by operationally-experience consultants, provides a roadmap for systemic improvements.

Insight Includes:

- Clinical Operations/Service Delivery
- Contact Centers
- Physician Relations
- Marketing
- Multiple audiences, including internal, physicians, patients, and donors
FOCUS ON THE FUTURE
Digital Insights & Dashboards

MARKETING CLOUD
Nurture and engage your customers with the right message at the right time.

CRM + PRM
Stable, flexible platform to capture, store and report data about your customers: their experience across touchpoints and channels.

Customer Experience
Awareness to Advocacy Across Touchpoints & Multi-Channel

Inference-free data for accurate competitive insight and market sizing

DASHBOARDS + REPORTING
Highly visual, interactive data visualizations that are easy to share and portable as needed.
ENDEAVOR ANALYTICS

Scope of Services

**Project Phase**

- **Framing**
  - Determine what's really needed to drive consensus and make high-impact decisions.
- **Data Fusion**
  - We assemble and organize disparate data from your internal and other external sources for maximum insight.
- **Visualization**
  - A picture says a thousand words. We utilize our dashboards to properly draw out meaningful relationships across time series data to paint the picture of the current state to draw conclusions and focus efforts on what matters most.
- **Modeling**
  - Once we help you develop several candidate solutions to your problem, we guide you through the development of an appropriate analysis to thoroughly understand the opportunity costs and trade-offs among the solutions. When this process is complete, you will know how best to execute your project, the range of value and risk you face, and how to improve the likelihood of your success.
- **Automation**
  - Our technology platform provides the ability to integrate business intelligence with workflow automation to make better decisions faster.

**Internal Process**

- Business Model Canvas
- Model Hypothesis
- Qualitative Modeling
- Data Readiness Assessment
- Development Options Matrix
- Data Acquisition Strategy
- Benchmarking Data
- Market Data
- Sales and Marketing Data
- Operations Data
- Market Research
- Data Cleansing
- Klipfolio Dashboard
- SFDC Dashboard
- Python Dashboard
- Endeavor Proprietary Dashboard
- SPSS
- Workflow Automation
- CRM Customization
- Recommendations Engine
- Artificial Intelligence
ENDEAVOR ANALYTICS
Real-time Integration of Disparate Data

**Take Big Data to Big Impact**
Leveraging our history of over 60 years in marketing research, we have created technology-enabled tools to help capture voice of the market, customer and employee. Our Insights360 solution will allow you to place listening posts at high priority touchpoints providing you with a 360 degree view of your key stakeholders and influencers. Built on the Salesforce.com platform, you can integrate real-time feedback with operational data for reporting insight within the context of the business environment. In addition, you can incorporate CRM to monitor, track and respond to positive and negative feedback all within the same system. Finally, a single platform for capturing feedback, tracking customer service trends, responding/service recovery and measuring your relationship with your customers.

Armed with customer experience insights, Endeavor Analytics leads CRM design teams to develop systems that meet workflow and business reporting needs; all aimed to enhance the customer experience. This includes a careful examination of end-user needs, identification of operationally critical information, workflow enhancements and data schema. Our requirements documentation can be used for your own programming, with other vendors, or for quality control and training.

Take Big Data to Big Impact. Our Insights360 solution will take your program to the next level. Going beyond data integration, we work with you to establish a solid measurement program that is in alignment with your business goals and strategy.

We help you identify what data matters most, streamline the process of data integration, then create visually rich dashboards and data visualizations to help you socialize and share insights with your stakeholders.

Physician360  
Patient360  
Marketing360
We work with nationally-recognized Institutions:
• 4 “Honor Roll” institutions
• 8 out of the top 20 cancer programs
• 3 out of the top 4 pediatric hospitals
• 3 out of the top 10 cardiovascular programs

National Benchmarking Studies:
• Patient experience management
• Marketing practices
• Physician relations programs
• International programs

Ranked as one of top 50 Healthcare Consulting firms by Modern Healthcare

The Endeavor Difference:

Our collaborative, information-based approach instills confidence in results and brings into focus the true meaning of offering an exceptional customer experience.

We have been specializing in customer experience for over a decade. Our approach applies industry best practices and proven frameworks to real-world situations.

Our team members have depth and breadth of experience and knowledge; many have executive-level experience at leading healthcare organizations.
THANK YOU

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