



EVOLUTION FROM PATIENT TO CONSUMER

ANALYSIS OF THE CHALLENGES AND TRENDS IMPACTING HEALTHCARE COMMUNICATIONS

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OVERVIEW

Just as the COVID-19 pandemic has exposed vulnerabilities in our healthcare ecosystem — from PPE and ventilators supply to vaccine development and distribution to the fatigue and burnout of frontline caregivers — it has also had an impact on the communications efforts of healthcare organizations. Providers have been scrambling to communicate across a broad range of topics to different audiences to address pandemic-related queries.

In an area that was already complex to manage (well before the pandemic) due to the disparate and decentralized nature of communications operations, there continues to be a tendency to divide the objectives and the role of communications based on a given area of focus. Instead, providers should be tackling it as a holistic strategy aligned to branding and customer retention.

The importance of regularizing and streamlining communications in the organization to provide better return on investment has never been acknowledged as much as it is right now.

In this paper, we present a perspective on the challenges impacting healthcare communications and why there is need for a Chief Communications Officer (CCO) who takes an enterprise view of communication, breaks down the internal siloes, and ensures the new consumer-driven patient is always front and center.

THE TOP FIVE CHALLENGES

Across the four main areas for healthcare communications — community, patient acquisition and retention, clinical, and administrative — five challenges have defined the need for more consistent and streamlined communications. These efforts have to be led at an enterprise level and with a strategic viewpoint.



1. Rise of consumerism in healthcare

For all healthcare providers, one of the main problems is that the pandemic has transmuted the patient into a customer. The patient as customer (PaC) is far more aware and critical than earlier, and wants to know more before committing to procedures, accepting the diagnosis, or paying for a new line of treatment.

The PaC also expects a faster response to queries that need to be customized and relevant to help in making the right choices and decisions.

So customers today are taking a more active role in the decision of how they receive care. They want their healthcare providers to know and remember who they are, understand their needs, and anticipate their future needs as well. This has led to a more consumer-oriented focus on how healthcare organizations need to communicate to customers, not regular patients.

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2. Lack of visibility and optimization

The financial impact of the pandemic cannot be overstated. The **American Hospital Association** (AHA) had estimated that by the end of 2020, hospitals would have incurred over \$320 billion in losses. Key contributors include postponed and canceled elective procedures, lower patient volumes across almost all specialties, and higher costs for supplies and labor.

One way to address these losses is to look at the cost side of communications. With communication expenses and budgets spread across many different departments within a healthcare organization, there is often little visibility into the total organizational spend by the communications team, leading to low optimization of costs in the long run.

THE TOP FIVE CHALLENGES (cont.)

A recent study conducted by RRD on a healthcare system comprising 40 hospitals with 5,000 beds and over 90 alternate sites revealed that the system's purchasing department had visibility into only 10% of the total communication expenditures. The other 90% was managed at a business unit or department level.

This system was working with over 400 different suppliers, generating almost 20,000 invoices annually. Their costs were higher due to not leveraging a higher spend with a smaller number of suppliers. They also experienced excessive process costs around the management of suppliers and invoice processing, besides having practically no visibility of all campaigns and activities.

Most healthcare organizations have a myopic view of the communications expense because they look only at the final product cost and not the total cost of communications. It is important to remember that the total cost includes tangential costs such as content, design, procurement, management and distribution, and obsolescence, which can often account for six or more times the expense of the final product.

They also do not leverage their total spend for communications with multiple departments using multiple suppliers providing comparable products and services. These suppliers may only offer cost-effective solutions in one or a limited number of the communications due to a lack of expertise or limited breadth of offerings.

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THE TOP FIVE CHALLENGES (cont.)



3. Branding inconsistency

Companies in all industries, healthcare included, spend a great deal of time, money, and effort on branding to build the image of what patients can expect from the provider and also differentiate their offerings. With the ongoing expansion of services, locations, and merger and acquisition activities, implementing and maintaining a consistent brand image across a decentralized audience base can be tricky and challenging.

From website design to a logo, color schemes, imagery, and text, healthcare providers need to ensure all facets of communication adhere to their brand standards. Even more important are the messages that are disseminated by different providers within the same organization.

The PaC is actively expecting synergies and relatability when engaging with the provider through communications and outreach programs. In the long-term, brand inconsistency can lead to erosion of trust and stickiness of the customers that want to connect, ask questions, and communicate more with their provider.

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4. Lack of infrastructure and expertise

During the pandemic, when effective communication became a critical enabling factor for healthcare organizations to reassure and inform customers, they have had to deploy whoever was willing to take on the additional responsibility from among their staff members. Employees from all levels had to multitask and work as an extension of the communications department even when they did not have the experience or the skills.

The level of commitment required, or the ability to think on their feet and implement creative brand-focused campaigns for patients or therapies, or regularize communications using the latest technologies and social media to benefit larger groups of patients, might not have happened at the scale and speed that was expected. In fact, during the huge rise in patient volumes, many healthcare providers did not even have adequate IT infrastructure to rapidly take care of patient information, which needed to be integrated with the different departments within the organization.

THE TOP FIVE CHALLENGES (cont.)



5. Measurement and accountability

Traditionally, healthcare organizations had not focused on analytics and measurability when it came to communications. It has been more of a hygiene factor to communicate than to use the communications department as a catalyst to drive the patient brand experience. Without measurement, no organization can improve or fix the challenges of communication.

Pre-COVID, a healthcare provider also did not pay special attention to secure a single owner for developing and implementing a communication or brand strategy.

The effectiveness of patient messaging, until now, did not take center stage as it did in the context of COVID-19, nor was the need for personalized communications as pronounced and necessary as it has become.

In addition, providers are burdened with multiple IT systems that are not connected. This makes the technology side of communications nearly impossible to merge and manage easily, leading to a fragmented and ineffective communication approach.

MARKET DRIVERS

The pandemic has necessitated a rapid shift in priorities and resource allocation for healthcare organizations, creating a powerful catalyst to take the gigantic leap from tactical to strategic communications at the leadership level.

Here are the top four trends driving the hunger for change and necessitate the need for a CCO to strategically manage execution.



1. Volume of communications

The first and most obvious reason has been the sheer volume of communications that was required since the start of the pandemic. Not only was there an evident increase in frequency, which turned out to be a huge challenge for providers who were tactical in their approach so far, but the PaC was doing research, demanding more insights and information quickly, and was looking for relevance and continuity.

For the healthcare provider, knowing how to maximize the communication effort by delivering content when and where the audience wants to receive it, as well as in the manner they want to receive it — print, digital, mobile, email, or the Web — has now become crucial. Communications needs to take advantage of the latest technologies that can revolutionize the way healthcare organizations have been communicating without focusing on preference or personal engagement by the customers.

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2. Increasing healthcare content online

Healthcare organizations' websites create their content with the intent of being informative and educational to address the public concerns when it comes to their health issues. As patients become more engaged in their medical care, content articles from sources beyond healthcare providers have now transcended into providing more in-depth explanations of disease and medical procedures.

Every day, Google handles more than one billion health questions, and it is safe to assume that people will rely more on online information regarding medical trends in the coming years. According to a recent **Weber Shandwick survey** of 1,700 adults, 52% are concerned that today's health-related information is either false or misleading.

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MARKET DRIVERS (cont.)

It has never been easier to search and find health content online, yet that content could be incorrect, promotional, contradictory, or overly complex.

As misinformation becomes rampant, healthcare organizations now feel the need to create their own brand awareness as the trusted source for verified medical content.



3. Leadership empowerment

Both negative and positive communication efforts and stories became evident as the full scope of COVID-19 came into focus. From the early moments of bringing attention to the virus, to later messaging around wearing a mask, to vaccine development, approval and launch, how healthcare providers communicated to internal and external audiences added either clarity or confusion to the pandemic efforts.

This demonstrated that some organizations needed to make significant improvements to their communication efforts by empowering leadership with the authority and resources to evolve and enhance their communication strategies.



4. One brand voice

Achieving a single brand voice across different providers and locations within the same organization has always been challenging. The need for one brand voice has emerged as a must-have in the backdrop of the pandemic. There are several factors that have contributed to the realization and importance of communicating as one entity to customers.

The communications department had to take an omnichannel approach in 2020 for effective dissemination of messages while struggling to maintain consistency across different types of audiences. Further, the budget cuts across all departments and specialties in the healthcare organization due to a drop in customer footfall, and a higher cost of acquiring more resources and supplies also drew immediate attention to the need for a single communication plan.

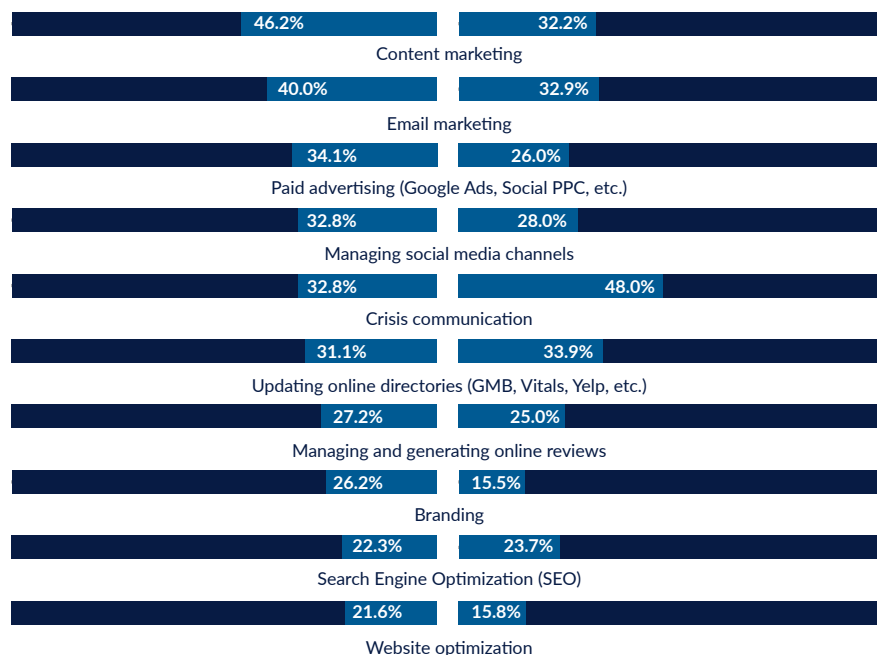
The need for one brand voice has emerged as a must-have in the backdrop of the pandemic.

MARKET DRIVERS (cont.)

On the other side, the spate of mergers and acquisitions led to chaos and a lack of consistency in communication and translation of the organization's goals and vision. When viewed from the lens of a provider's brand promise, the rising need for developing one brand voice to build customer confidence takes center stage.

How has COVID-19 impacted your healthcare organization's top marketing initiatives?

Top initiatives before COVID-19 Initiatives now due to COVID-19



Source: binaryfountain e-book, "How COVID-19 is Shifting Priorities for Healthcare Marketers"

THE SOLUTION: A HOLISTIC VIEW OF COMMUNICATIONS DRIVEN BY A CCO

Healthcare organizations are large, complex organizations that must optimize their communication approach and practices to reap substantial benefits. Unfortunately, this size and complexity often leads to a lack of continuity and cohesiveness when it comes to communication.

The time is right for healthcare organizations to take a more holistic approach to their communications efforts. The lasting impact of COVID-19 will change how healthcare is delivered — where, how, and by whom — and, if healthcare organizations expect to capture their share of the market, how they communicate to their marketplace will be more critical than ever.

The most effective way to combat the various challenges faced by the healthcare organization currently is to view its entire communication effort more holistically. Even before the pandemic, the tides were turning in favor of this approach. Let's look at some of the reasons why.

The time is right for healthcare systems to take a more holistic approach to their communications efforts.

Key benefits of a holistic communication approach

- Ability to go across the organization at a high level
- Develop a consistent strategy
- One contact point, one-stop-solution provider
- Owner of the communication technology piece
- Knowledge of all the working pieces
- Streamlined work processes and better collaboration
- Reduced costs
- Integration of strategy with execution

THE FUTURE OF HEALTHCARE SYSTEMS' COMMUNICATION

At the start of the pandemic, a blog post on **Forrester** revealed 52% of U.S. online adults prefer to buy from companies that show how they are protecting customers against the threat of COVID-19. After a year, it is evident from the market drivers of healthcare that customers find those brands that prioritize them, and they prefer to spend their money on them. They reward providers whom they trust with their loyalty and advocacy. This year, the evolved PaC will demand something more: a broader digital door.

Traditionally, the physician offices have been the front door of the U.S. healthcare system, but against the backdrop of the pandemic, the demand for telemedicine rose as did the preference for a variety of digital channels to help the customer reach the provider faster.

In August 2020, **Deloitte Insights** posted an article that revealed the findings of a survey during the pandemic (April-May 2020) — **The Health Care Consumer Response to Covid-19 Survey** — that clearly showed customers were willing to tell their doctors if they disagreed with them; they were using tools to get more information on health issues and costs of treatment; tracking their health conditions and using that data to make decisions; and accessing and using their medical record data. The number of their virtual visits were higher than ever before, and they planned to continue in this vein in the future.

As customers are now expecting virtual visits to be comparable to in-person visits in terms of personal experience, the healthcare organization could implement technology more enthusiastically, and this is particularly true for organizations that treat chronic conditions and are most likely to value a sustained relationship with the patient.

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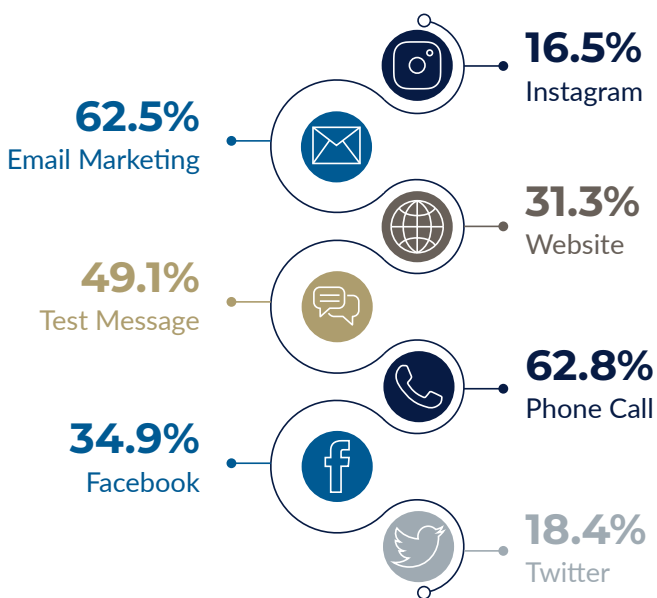
THE FUTURE OF HEALTHCARE SYSTEMS' COMMUNICATION (cont.)

The paramount condition for customers to return to their healthcare provider is trust. According to **Frost & Sullivan's Top 10 Predictions for Healthcare in 2021**, nearly 35% of patient interactions will be digital compared to the 20% currently as delivery paradigms change. The research also indicates a growth of nearly 20-25% in patient engagement solutions in 2021 alone.

What does this mean for healthcare organizations? The PaC has grown accustomed to digital healthcare, and now demanding it from providers. This means while building the broader digital front door strategy, organizations have to think of innovative ways to use technology for communications.

Customers will seek digital interactions that are seamless and will use different devices and channels to get the information. The future of healthcare communications will feature some of these significant go-to-choices for the providers as they rehaul their communication strategy and rethink the methods of dissemination, education, and engagement.

Current state of healthcare marketers' communication during the COVID-19 pandemic



Source: binaryfountain e-book, "How COVID-19 is Shifting Priorities for Healthcare Marketers"

THE FUTURE OF HEALTHCARE SYSTEMS' COMMUNICATION (cont.)



1. Voice search optimization

As people become more health conscious, the use of keywords for voice searches that will answer the health-related issues, explain surgical procedures, or even simplifying medical terms can be beneficial to the provider's communication.



2. Focusing on infographics and video

Text-heavy content is being overtaken by infographics and video. Video marketing makes complex information seem more like a one-to-one conversation. Treatment procedures, testimonials, and awareness drives will be the most common types of video campaigns for stimulating a healthcare brand's audience engagement.



3. Establishing credibility on social media

Social media is an increasingly powerful platform for delivering targeted communications. However, people are getting fatigued with recurring content appearing on their feeds with a clear-defined sales promotion goal. What customers will look for in the future is a credible brand that genuinely cares about them.

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4. Mixed-reality aided treatment

Virtual reality (VR) is the core of digital transformation in the healthcare organization. Its myriad applications are profoundly changing the way patients are being treated. VR also gives access to tasks and visual experiences that are otherwise impossible during therapy.

CONCLUSION

In the aftermath of the pandemic and the new rules of engagement, healthcare organizations need to very quickly evaluate the current state of their communications and the type of programs they are running to convince patients to return to them.

The next step to a meaningful transformation as a trusted and caring provider would be to identify the gaps in all the main areas of communications operation in the organization. The challenge is to address all the current operational challenges as well as communication-related problems and the technology challenges that are hampering a better, and a more focused customer experience delivery model.

The pandemic has acted as a catalyst for change and presented an opportunity for organizations to embrace the growing importance of emerging technologies, an omnichannel marketing strategy, and an advanced virtual customer experience. To improve the trust and service ratios, the organization has to go where the PaC is searching, learning, and consulting on health matters — be it communities, social media, or the Web.

To save time and take advantage of the economies of scale while focusing on building a trusted brand voice that is consistent, frequent, and customized, a holistic communication approach driven at a C-level could be a game-changer for healthcare organizations. The right program can speed up the organization's transformation process without interrupting current communications, and enhance overall customer experience appropriately across channels. Backed by experience, scale, data, and technology, healthcare organizations can change the way they communicate and offer services to patients from 2021.

Consistent branding, engaging content, and broadening the digital door is no longer a choice; it is a necessity to drive growth and increase footfalls of life-long customers.

The right in-house agency-partner can speed up the organization's transformation process without interrupting current communications, and enhance overall customer experience appropriately across channels.



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