

## Health Plan Portal Adoption

# An Action Plan for Member Engagement



As digital member engagement continues to grow in importance, Healthx is committed to deliver strategies and tactics proven to drive adoption and utilization of our member portal and mobile app. This example highlights the approach we designed for one customer and is representative of our involvement with those strategically focused on digital member engagement.

This case example outlines the Healthx experience in collaborating with a large government health plan and the approach we followed to achieve defined adoption and utilization goals. The collaborative relationship produced positive business results which continue to fuel member engagement opportunities for the plan.

## Business Objectives

The primary business objective was to generate administrative cost savings. Member Services costs were substantial and growing, with particular impact from inbound customer service calls and outbound letters from several departments. They handled thousands of calls a day, averaging nearly \$5.00 per call in expense. Additionally, costs for processing incoming emails, field office walk-ins, outbound mail and postage were significant. Migrating many of these service requests to a self-serve member portal meant big savings potential.

## Member Touch Points

During our Discovery work, we identified all reasonable touch points – member interaction opportunities to convey information about the portal and its features. We classified some as “high-influence” based on having a person present the rationale to register for the portal, and others as “low-influence” when the communication was one way and there’s no one to influence them directly. The engagement strategy maximized both high-influence and low-influence touch points to help achieve the business objectives.

- High influence interactions allow a member to be directed by the customer team, or someone acting in that capacity, to adopt and utilize the web portal. Focusing on high-value interactions is effective because they provide significant steerage and occur in sufficient numbers to produce good results. They are high impact, but can have relatively lower overall reach.
- Low-influence interaction help make members aware of the availability and/or benefits of the portal, but with limited opportunity to directly influence them to use it. There are more low-influence interactions than high-influence interactions, and they cast a wider net. They are typically high reach, but can have lower impact.



### 1. Member Services Calls (High-Influence)

Member Services representatives interact with thousands of plan members each day, most of whom are in need of some type of service. There were opportunities to pitch the web portal and mobile app and help them register while on a live call, plus utilize any “on hold” messages to emphasize digital options. Member incentives and Member Services incentives were also integrated.



### 2. Field Office Visits (High-Influence)

Customer has several field offices which are often the primary point of health plan contact for many members. Local staff are there to help members and often can interact in multiple languages. This represents an excellent opportunity to directly register individuals on the portal because of their personal interaction – and they can do so during wait time, which is typical.



### 3. Member Enrollment (High-Influence)

Member Enrollment (and re-enrollment) provides an excellent opportunity to present the member portal to new enrollees and get them registered. The customer had several hundred sales agents working from a wide variety of locations (store fronts, kiosks, vans, etc.). Agents are equipped with laptops and printers and conduct enrollment via computer. They complete several thousand enrollments/re-enrollments each month, and are able to easily make account creation part of the enrollment process.



#### 4. Provider Visits (High-Influence)

Physician visits also represented potential for direct impact. While the plan doesn't have the same amount of influence over providers as it does its own employees, the sheer number of visits coupled with the fact that people have a unique relationship with their healthcare provider made this a relevant touch point. We identified several clinics/providers with concentrated pockets of member activity and included signage and cards or flyers that were given to members or made available at the desk.



#### 5. Outgoing Printed Materials (Low-Influence)

Low-influence touch points don't have as much immediate impact, but the broad reach makes the outreach opportunity vitally important. There were many natural points of contact used in delivering relevant messaging, such as EOBs, marketing outreach and other mail directed to individual members. Since direct mailings represent the only interaction many members may have with the plan, it was important that the benefits of the portal be included with these mailings. A standardized content block with the URL for the member portal was used on outgoing mailers whenever possible, often using a QR code for easy access to the registration page URL. Printing the message on the outside of the envelope was also effective as it helped reduce mailing complexity because the message didn't have to be printed on pieces inside the envelope.



#### 6. ID Cards (Low-Influence)

The ID card is an ideal touch point from the standpoint of market saturation. Every member has one, and the opportunity to present the URL and other information can often be overlooked. Listing the URL and information on how to access the portal is perhaps the single best way to get information in the hands of all members. It is ideal to also include the name of the mobile app or even a QR code, but at a minimum the URL for the member portal should be on the ID card.



#### 7. Outgoing Emails (Low-Influence)

Customer email outreach was used to drive member portal usage and improve overall communication with members. Creating alignment between the customer's email platform and their CRM tools was essential to ensure only members who have not signed up for the member portal (at least for the adoption portion of project) were targeted. Text messages were also useful.

## Business Results

Year 1 metrics for portal adoption and utilization were aggressive yet were termed achievable with the amount of commitment, budget and collaborative interaction between Healthx and the customer. Having a dashboard allowed for near real-time monitoring of member interaction, and was instrumental in assessing impact and determining required changes in member communications strategies and tactics. It was also very helpful in demonstrating the business value of evolving customer service in a digital world.

The customer has realized self-service is the new norm in member communications and that by making information consistent and convenient as members engage with the plan, they can achieve better outcomes. Integration of mobile access provided more options for members. Year 1 business objectives were achieved.

## Recommendations for Success

Many positive outcomes from this experience can have implications for any number of health plans seeking greater efficiency and better results. Below are some key recommendations:

- 1** Establish definitive and measurable multi-year business objectives, and monitor on a daily basis.
- 2** Conduct meaningful and thorough discovery on internal processes, member messaging, touch points, etc.
- 3** Create a governance structure for digital engagement to ensure effective/timely coordination of member-facing activities.
- 4** Find smart ways to connect with members where they are and communicate to them via their preferred methods.
- 5** Strategic transitions like this require cross-functional teamwork—business owners, technical teams and compliance must be involved in the process to identify potential solutions that meet both business and regulatory requirements.
- 6** Take a phased approach to implementation—start with base requirements for member engagement and then phase in enhancements to the member experience to minimize the initial impact on internal resources.
- 7** Incorporate education and training of member-facing staff beyond the technology—help them to deliver a meaningful experience and consistent messages across all member touch points.

The business results from this example may or may not be directly repeatable using the same strategies and tactics, but the process of identifying the right business objectives, conducting thorough discovery, defining strategies and tactics, staying focused on the results, and maintaining commitment to effective member engagement, will deliver positive results.

Healthx provides the healthcare industry's leading digital engagement platform connecting our payer customers to their consumer, provider, employer and broker constituents. As an innovator in cloud-based technology, Healthx supports over 170 payers representing 16 million members and 600,000 providers. Led by healthcare and technology experts passionate about delivering engagement solutions that drive outcomes, we help our customers achieve their business objectives through online portal and mobile app utilization with measurable ROI.

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