

## Cleveland Clinic & hc1.com® – A Success Story

### Healthcare Specific CRM

Cleveland Clinic Laboratories began its formal relationship with hc1 in January of 2014 planning a phased activation focusing initially on Laboratory Sales and Client Services. hc1 was deployed at Cleveland Clinic Laboratories in May of 2014.

Cleveland Clinic Laboratories provides laboratory diagnostics and pathology interpretations for patients across the integrated Cleveland Clinic Health System as well as for its many reference laboratory clients. As a crucial liaison between the testing process, and the caregivers ordering those tests, both within and outside the health system, Laboratory Client Services needs streamlined, effective and flexible tools to facilitate communication and ensure value in its interactions. As the reference laboratory continued to grow and the needs of the health system evolved, the need for more effective tools became apparent. A team of people was assembled to find a Customer Relationship Management (CRM) solution with the ability to address evolving operational challenges. The hc1 Healthcare Relationship Cloud® emerged as the best solution.

“hc1 became the clear choice. We needed comprehensive real time information and insight into our relationships with our clients and the ability to use this insight to drive action and accountability and ensure value in our client interactions. hc1 provides a platform for integrated, real time exchange of information between cross functional work groups, and supports the work flows needed to drive responsiveness and case resolution. This kind of information is essential to our relationships with our physicians and patients, and to our ability to grow our business,” said David Bosler, MD, Head of Cleveland Clinic Laboratories.

Before activating hc1, Cleveland Clinic was using multiple IT solutions across various sales, marketing, client services, and laboratory departments. These disparate solutions led to a number of challenges such as:

- Non-standardized communication with physicians and other key stakeholders
- A cumbersome process for accessing historical data on client relationships which limited the full incorporation of this information into current decision making
- Excessive employee time spent categorizing issues and communication across departments
- Non-standardized cross-departmental communication and absence of lean workflows

- Manual compilation of many recurring reports, resulting in delayed data and formats that lacked standardization

“We realized a generic CRM wouldn’t meet our needs,” said Dr. Bosler. “We were looking for one central system that many work areas could use as the shared ‘go-to’ resource for current information. The visibility of client reports, data tracking, and the sales pipeline all in one integrated platform were added bonuses.”

Activating the hc1 Healthcare Relationship Cloud at Cleveland Clinic Laboratories has resulted in:

- Increased transparency and coordination between departments
- Faster issue resolutions
- Access to real-time trends and reports that contribute to informed decision-making.
- Updated processes and procedures through lean workflows

“hc1 is so effective and versatile,” says Holly Burt, Coordinator at Laboratory Client Services. “We have the ability to customize the solution to fit our specific workflows and determine what data we need to capture and report on. It is helpful in streamlining reports to the leadership of Cleveland Clinic Laboratories.”

## Real-Life Applications

Cleveland Clinic Laboratories worked with hc1 to create a phased approach to activating the solution. Phase 1 took place over the last year and a half, and was comprised of activating 128 Cleveland Clinic Laboratories users within Laboratory Client Services, the Problem Resolution Area, and Central Processing area. hc1 quickly became an important part of day-to-day operations in these areas:

**Laboratory Client Services:** The Cleveland Clinic Laboratories Client Services team utilizes hc1.com to satisfy 90% of their day-to-day operations. Team members log every incoming call. In particular they can log account issues by status and root cause to track the most common types of issues. Work queues allow reps to tackle different cases based on their urgency and case type. These specific workflows also help with internal reporting and training methodologies. Donna D. Cooper MS MBA, Manager of Laboratory Client Services and Test Utilization, is anticipating the next phase of the hc1 roll-out which will include business intelligence dashboards to quickly see areas of concern, allowing for prompt issue investigation and case resolution. “We have only scratched the surface of how hc1 can support our business processes throughout the organization,” she says. “We are eager to use

hc1 to manage Test Delay Notifications, Exception Handling, and provider notification for significant and critical values.”

**Problem Resolution Area:** The test-add on process was dramatically streamlined with the implementation of hc1. The updated workflow has resulted in tangible efficiencies. Laboratory Client Services representatives receive many requests for adding tests to an existing specimen. Using the case functionality in hc1, Laboratory Client Services assigns tasks to the Problem Resolution Area techs including specimen tracking information. The techs can then complete the test add-ons and assign cases back to Client Services to resolve the case. This process results in closed-loop accountability and time savings. Now, if Laboratory Client Services receives a call from a client inquiring about an order, they are able to log into hc1 and look at the notes for context. Being able to streamline this process has reduced the time it takes to process a test add-on considerably, and ensures add-ons are completed.

Realizing the overall value of hc1, Joe Seestadt MBA, Administrator of the Robert J. Tomsich Pathology and Laboratory Medicine Institute, championed an initiative to work with leaders from hc1 on a Kaizen event. The Kaizen was managed by project manager, Javonna Lewis. A Kaizen brings together key stakeholders to map out existing processes, identify where improvement needs to occur, design improvements for the existing processes, and solicit buy-in from all parties to ensure change occurs.

Seestadt and Lewis gathered key figures from the laboratory and hc1, including David Bosler, MD, and Brad Bostic, Founder and CEO of hc1.com. The goal for this multiday event was to determine where hc1 could be used to support improved processes. The hc1 team was on hand as consultative partners to work with Cleveland Clinic Laboratories leadership to develop streamlined, timesaving processes, procedures, and workflows across the organization.

## Continued Innovation

Looking forward, Cleveland Clinic Laboratories is currently scoping Phase 2 of activation, focusing on integrating data from additional information systems into the hc1 platform. Key systems targeted for integration include the laboratory information system and billing system. hc1’s open platform enables multiple integrations and houses all data in a secure, HIPAA-compliant private cloud, which ensures all test information is available only to those with secure access. Having access to lab ordering and result information in hc1 will boost the comprehensiveness of Cleveland Clinic Laboratories’ view of its physicians and clients to the level of an individual test in one platform. The integration will also help ensure clients are promptly notified of test delay information. Test delay information will be entered into hc1 by the performing lab, creating a case that will be sent to Laboratory Client Services. The case will include test name, the reason for the delay, the anticipated

duration of delay, and time stamps to ensure no critical information is missing or left out. Laboratory Client Services can then use hc1 to quickly notify clients of the delay.

As leaders at Cleveland Clinic Laboratories became more familiar with hc1's capabilities, it was clear that there was much they could accomplish:

- **Growth:** as Cleveland Clinic Laboratories continues to grow, hc1 is poised to provide continuous cross-functional visibility, lean workflows and access to real-time data and intelligence to help the team members stay ahead of their clients' needs
- **Client retention:** with hc1, the lab can effectively retain clients by using the information to better understand their clients. They can address explicit concerns and issues with efficiency, accuracy, and knowledge. They can also use trend analysis to identify and address potential issues proactively. With the data available in hc1, Cleveland Clinic Laboratories can help educate providers and begin to reduce these issues
- **Standardization:** with hc1 as a trusted partner, Cleveland Clinic Laboratories can present data to clients with hc1's full-service platform including real-time Business Review data for collaborative and insightful discussions. hc1's marketing and campaign tools will be available to ensure timely updates and real-time engagement with clients. Potential future integrations with billing and other systems will provide even more avenues for client success.

Healthcare is undergoing a period of rapid and monumental change. Innovative organizations such as Cleveland Clinic Laboratories understand that to remain competitive they need to continue to find ways to better understand and respond to their clients' needs, and that integrated data platforms such as hc1 can be a valuable tool in that quest. Systems of connectivity, communication, and engagement enable organizations to improve processes, grow their business, and retain clients. Ultimately these systems facilitate what matters most: delivery of better patient care.