The Power of Personalization in Healthcare

A Guide to Personalization in Healthcare With Acquia Marketing Cloud

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Depend on Digital to Connect With Healthcare Consumers

The healthcare industry continues to feel the impact of the COVID-19 pandemic. Despite much uncertainty, digital health's vital role across the payor and provider industry is now more firmly established. The focus on digital health and shift to digital platforms will play a pivotal role in meeting healthcare consumers' evolving expectations and ensuring business resilience.

Today, digital includes data science goals of ingesting and acting on greatly increased volumes of patient-generated data, for example, to marketing topics like personalization. Digital tools once considered future state have now become primary channels for delivering vital care and meaningful customer interactions. Impacts extend beyond digital care delivery and are driving even greater executive attention on all aspects of digital.

Three in four people say that they want to have the same experience in healthcare that they receive from other businesses.

Improving digital engagement is imperative in healthcare, where consumer acquisition has historically been challenging. To provide members and patients an all-encompassing digital journey, it's important to look at everything – even those experiences that might be outside of your direct control, like telehealth – in order to give your consumers a full, connected experience. When your patients and members remain connected and engaged, they will bring more lifetime value to your organization through ongoing referrals and brand advocacy.

Enabling a tailored and relevant digital experience is a business imperative. COVID-19 implications include fewer traditional touchpoints than before. Digital properties are both proxy for those lost touchpoints and a means to differentiate your brand.

Whether a health plan or health system, you must communicate in a personal way and provide relevant information across the entire journey. To accomplish this, many healthcare organizations are doubling down on data, turning to digital platforms with personalization capabilities to leverage that data and drive engagement.

This guide will help you to understand:

- The basics of personalization, unique challenges, and expanding use cases for personalization in healthcare

- Various personalization methods and steps to implement your strategy

- Ways to effectively measure the ROI of personalization

- How Acquia Marketing Cloud solutions can support your implementation

Marketing communications exist on a spectrum. At one end, you have mass marketing, where a blanket message is blasted out to all. All prospects get the same experience. At the other end, you have one-to-one marketing, where a specific, tailored message is shared with a single target. This is true personalization. And what's in the middle? Tactics that enable marketers to customize content, each with varying degrees of effort and investment.

Shaped by ecommerce experiences, consumers aren't responding to the old mass marketing approaches; they have high expectations for a personalized – or at least a relevant – experience. Despite many companies understanding the importance of personalization and deeming it a high priority, most aren't sure where to begin, or find implementation to be a slow, arduous process.

The healthcare industry has been slower to adopt personalization. If there's ever a time to prioritize the digital experience, it's now. Just prior to the pandemic, 41% of healthcare consumers reported they would leave their healthcare provider altogether because of a lackluster digital experience.[1] Think that has increased since March of 2020? We do, too.

This struggle is amplified in healthcare, where it's imperative that marketing messages are helpful without being invasive. It's a delicate balance, as your users both want and expect you to provide relevant personalized experiences and recommendations based on their unique profile, condition(s), or expressed preferences, while not exposing or using information they consider confidential.

87% of surveyed marketing leaders said their organization is pursuing personalization.[2]

[1]Hubspot
[2]Gartner

Despite these obstacles, personalization is still a "must" in healthcare. And while personalization may not be the goal in itself, it is a method to attain performance goals. It's been shown to increase the effectiveness of marketing efforts by improving the patient and member experience through personalized and connected interactions. Do this, and you'll drive better outcomes and greater healthcare value.[3]

The ROI of Personalization

- Increase loyalty among existing patients, members, and providers

- Create a cycle of engagement

- Make your ads more relevant to your target audience

- Know when to stop spending money on ineffective campaigns

- Improve lead nurturing

- Maximize up-sell and cross-sell potential

- Give consumers what they want

With a more holistic view of your consumers that's backed by a leading digital experience platform like Acquia Marketing Cloud, you can create, test, and optimize experiences to drive more value.

[3]Gartner

Top Three Challenges to Personalization

Personalization challenges often relate to data. Data drives the solutions needed to deliver personalized experiences, making your data practices and governance a critical piece of the puzzle. Unfortunately, more data doesn't necessarily create more value. What's more important than how much data you have is knowing when to leverage data.[4]

Here are a few common challenges we've helped clients navigate.

1. No Single View of the Patient or Member

Having a 360-degree view of your patients and members is a cornerstone to executing the one-to-one marketing that progressive organizations are delivering. It's also a significant obstacle for many organizations. Without a complete view of all consumer data, it's difficult to know who your consumers are and how to anticipate their response at any given time.

This boils down to a data management issue. Organizations struggle to gain this single view for a few reasons: the inability to connect data across multiple systems, poor data quality, or lack of relevant supporting technology.

Overcoming this challenge involves building the right digital foundation to achieve a complete patient or member view. This includes:

- Unified login and registration process across digital properties to recognize patients

- A mature, orchestrated approach to data access and integration for the platforms you intend to use in driving personalization

- Customer data platforms that collect data in real-time for holistic, up-to-date member profiles

[4]Gartner

Improving Data Management Enables Single View of Member Data

While it may be a challenge, healthcare organizations are taking steps to integrate disparate platforms and achieve a holistic view of the consumer. For example, a large health insurance plan had multiple member records within its legacy systems that were duplicates. The organization also had a discrepancy in attributes that caused internal sales representatives to target multiple renewals for the same member.

We worked with the payor to implement a master data management (MDM) hub that consolidates member data and builds trust settings to publish versions of truth to its CRM system. To create business ownership and data stewardship, a data governance RACI was established. The MDM solution improves data quality by providing a 360-degree view of consumer data and associated contracts under each member. Additionally, it optimizes the renewal process and maximizes business throughput for renewal quotes and sales.

2. Inability to Quickly Gain and Apply Insights

Your patients and members are consumers, first and foremost. These healthcare consumers are active across a variety of different channels and devices. If you wish to engage with a prospective audience, you must meet them where they are and become part of the conversation. To create a personalized experience in the moment, you can't limit yourself to optimizing it for one channel, nor can you solely rely on historical and basic consumer profile data.

Whether you have thousands or even millions of members, you also need to be able to scale these personalized experiences. To do this, your digital experience platform needs to be able to harness and analyze member data to automatically deliver customized content, offers, and programs. When you automate the communication across channels, you will be able to improve conversions through consistent, relevant offers every time.

As emergent types of interaction within the healthcare system begin to see rapid adoption, in part driven by COVID-19, the boundaries of this personalization also expand. It's no longer just about pointing a patient to the tools, tasks, and experiences most relevant to them, it's now about making sure that a patient's experiences across engagement screens, channels, and modalities mirror what you, their provider, knows about them that others may not. It becomes an extension of your healthcare system's own digital partnerships. Everything that makes the series of interactions and options easier for consumers to navigate is part of the overall goal.

3. Lack of Coordinated Resources to Execute

Securing and coordinating resources to execute a personalization strategy is another challenge.

Part of the problem lies with ownership of this role. Does it belong to the digital marketing team or a specialist in corporate marketing? What role does IT play, and to what extent are they involved in the implementation?

Answers to these questions will vary based on the structure of your organization and the approach you take. As you move from planning to execution of your personalization strategy.

Considerations will include:

- Understand the resources needed, and whether you can build internally or need to find an external partner.

- Form a center of excellence (CoE), or small team with cross-functional roles, to provide leadership, share best practices, and offer support and training when needed.

- Build up your internal team by establishing a development governance model to ensure governance is an enabler versus an inhibitor. When done right, governance should empower people to make decisions and streamline the decision-making process.

Implementing Personalization

Digital marketing has redefined segmentation in the age of mass media. With access to consumers' online history, preferences, and behaviors, you can now understand them and segment your marketing on an individual basis.

Creating personalized experiences for individual patients and members may seem overwhelming, but it doesn't have to be. We guide our clients through the Personalization Spectrum, so they can start small and grow their personalization strategies over time.

The Personalization Spectrum is based on four personalization strategy types:

Contextual
Contextual personalization considers the specific environmental factors and circumstances that surround an individual user story.

Persona
Persona-based personalization aligns a user's needs with those of a pre-defined target persona.

Behavioral
Behavioral personalization takes into consideration a user's previous interactions to provide an evolving experience that spans across interactions.

Journey
Journey-based personalization looks at the consumer journey to determine where a consumer fits within that journey.

Contextual

Contextual personalization is the foundation upon which you can build more complex strategies. You can use specific environmental factors and circumstances about a consumer without having to know much about them as an individual.

Contextual personalization includes:

- Geolocation
- Device detection
- IP lookup
- Temporal factors

Using tools such as geolocation and IP lookup, you can personalize based on an individual's location or the organization with which they are affiliated. Geolocation allows you to provide information, such as an offer or event, tailored to your user's specific location. With IP lookup, you can identify if a user is associated with an organization, such as a hospital or educational institution. With this data, the experience can be targeted to that specific audience.

Device detection allows you to determine the device consumers are using and whether they visited your site from a desktop or mobile device. You can also see which browsers your consumers use most often and make note of any trends that will differentiate your audience based on browser preference.

Other means of applying contextual personalization include temporal factors such as time of day or time of year. Are members coming to your site more at the beginning and end of the year, as insurance policies are updated and they seek out information, or in the month of December, as patients look to schedule last minute appointments and use whatever remains in FSA accounts? Is there a season or month driving more traffic your site?

Your audience may take different actions based on time of day (morning vs. afternoon) and year, and you can collect that information to evaluate these trends and provide basic personalization around these factors.
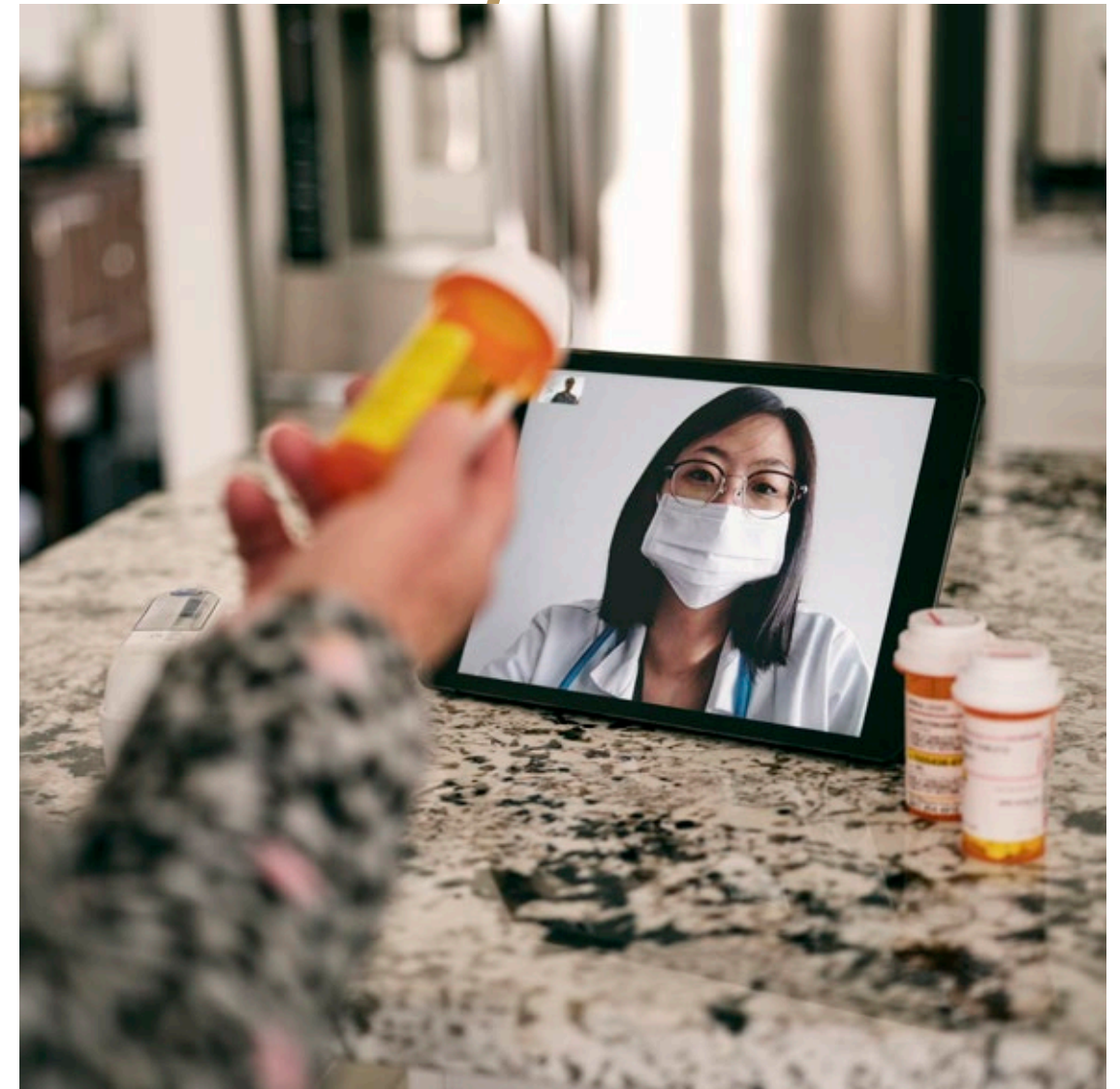
Persona

The next spectrum level is persona-based personalization, which aligns users' needs with the characteristics that fit your pre-defined, target personas. A persona is a fictional character created as a proxy for a target audience. Personas categorize similar patterns of behavior that result in commonly held goals. Digital marketers create personas by evaluating primary and secondary sources, including ethnographic insight arising from direct observation of people and from data on their behavioral patterns.[5]

As you gather more information about your patients or members – interests, intent, historical interactions, appointment history, etc. – you can associate them with established personas. Building a repository of this data will allow you to send more targeted messages and offers.

As more of this data is collected and applied to personas, it allows you to automate a decision-making engine that delivers content through sophisticated algorithms.

Behavioral

Companies are trending towards segmenting consumers based on interactions with web content and digital marketing campaigns. With behavioral-based personalization, you can leverage clickstream data to micro levels including click events, funnel segmentation, and other first-party cookie data.

As healthcare consumers navigate your site, you begin to acquire "traits," which you can use to target and deliver specific information. Traits can be based on behaviors, or on basic demographics, location, and other factors unrelated to users' actions.

For example, an individual who visits a healthcare provider site and clicks on an article about managing diabetes may indicate that she fits the persona of Diabetes Care, meaning she has diabetes or cares for someone with diabetes.

Based on this information, your marketing automation platform can send targeted emails with diabetes education, tips, and information to connect and engage with them. It's important to note where this information came from: click-through to campaign content in a public space. The interaction didn't occur within a secured form and it doesn't fall under Protected Health Information (PHI) which is regulated by HIPAA.

By measuring actions taken on your site – pages viewed, searches performed, or documents downloaded – you can better understand individuals, make data-driven decisions, and take analytically derived actions for a specific channel or across all channels. Many health organizations are looking to take it a step further with activation data from digital health tools for an even richer source of insight about patients and members.

Journey

Understanding where a consumer is on their healthcare journey is another way to target information. However, journey-based personalization is the most complex because you need to be able to quickly gather and act upon data from multiple sources, some of which may come from within your organization while other information sources are external.

For example, you know the individual previously described is interested in managing diabetes, based on their activity on your site. But you might not know that they also have high blood pressure. It is important to collect that information either through voluntary input or the integration of PHI-free secondary sources. Using this rich data from multiple sources, you can better target the experience by providing tailored content around both diabetes and high blood pressure.

The bottom line when it comes to applying personalization strategies is to start simple. Introducing complexity too early can slow implementation and analytics processes. You need to evolve personalization strategies by establishing baseline metrics and creating business rules first, then add complexity over time.

Personalization Methods

Rules-Based

Rules-based personalization uses logic-based rules to determine the content or functionality that is delivered to an individual user. For example, you can set rules based on the IP address or physical location of your visitors, the keywords they use to reach your site, their mobile device, or the goals they achieve on your website to determine the content displayed.

- Manual process

- Leverages known factors

- Requires targeting capabilities

Automated

Automated personalization leverages machine-learning algorithms and predictive models to determine which rules to execute for any given user. By evaluating an individual user's behavior and profile and matching that against historical trends and best practices, automated personalization can dynamically adapt the content shown to visitors in real time.

- Automated process

- Requires sufficient data

- Requires advanced segmentation

Cognitive

Cognitive personalization is an advanced method of creating and delivering customer-focused experiences. It uses artificial intelligence focused on reasoning and understanding to provide insight driven recommendations and conversational experiences.

- Enhanced process

- Leverages natural language processing

- Requires training

Questions to Guide Your Personalization Strategy

Creating and implementing the different levels of personalization relies heavily on knowing some key information about your target audience. Know the answers to the following questions about your consumer base and other visitors to your site:

Who **visits your site?** You want to identify user attributes so you can align them to established personas (if applicable). Then, determine the content and features to present that will support their interests.

What **do your consumers (or prospective consumers) seek?** Once you understand the primary content individual patients or members seek, then you can provide supplemental content to support the overall experience.

Where **are they coming from?** Using IP lookup and geolocation, you can quickly identify language preferences/defaults to immediately deliver a targeted experience based on the visitor's location. Are referral sources coming from an established campaign or organic search?

When **does the interaction occur?** Determine how an interaction fits within the overall user journey, in order to anticipate the user's needs and provide them with the next level of information. How are they using new interactions like telehealth and what can you do to personalize those experiences as part of their overall journey?

Why **do they visit your site?** By mapping the Who, What, Where, and When to user stories, you now have context to understand why consumers/visitors are engaging with your organization and how to make the experience better for them.

How **do you drive them to the right experience?** Once you have data about individual users, you want to evolve the experience based on their engagement with your site. For example, if they search for a certain topic and then watch a video or download content based on that search, you can now start building a profile throughout the session and apply more sophisticated personalization techniques along their journey.

Ready, Set, Go! Three Steps to Personalization

When you deliver targeted content across all channels, you boost loyalty and the long-term value of your consumers. After gathering essential data about your consumers and site visitors, it's time to execute your personalization strategy.

Step 1: Integrate Data Sources to Create a 360-Degree View Your healthcare audience may not understand how they receive personalized content, but they expect it. Among the massive volumes of consumer data, it's important to find the right data – meaning that it's timely, insightful and actionable.

By integrating front- and back-end data sources, you can collect key insights about your consumers and build a 360-degree view that will help you guide their journeys by presenting the right content at the right time.

Organizations are also turning to customer data platforms (CDP), like Acquia CDP, to combine and centralize customer data in real-time. With unified customer records, you can more intelligently create segments based on audience use cases and use those up-to-date profiles to deliver personalized experiences.

Step 2: Create and Test Personalized Experiences

Using this holistic view of your consumer, it's time to take a step forward and build personalized experiences. Keep in mind that testing and measuring performance are key to executing a successful personalization strategy. This not only includes general testing methods, such as A/B testing of subject lines or landing pages, but also testing different versions of landing pages for different audience segments, specific designs for each micro-segment, or offers based on consumer personas.

Try these methods to learn more about your healthcare consumers, and then apply this knowledge to future marketing efforts:

- A/B and multivariate testing to uncover performance metrics across content strategies and explore how tweaks to the digital experience impacts conversion rates

- Rules-based targeting, or the use of logic-based rules, to create location-specific offers or test other temporal factors

- Automated personalization, or the use of machine learning and predictive models, to dynamically generate personalized experiences

- Segmentation to organize and accurately use visitor data

- Leverage the power of cognitive solutions to understand the intentions – or even sentiment – driving consumers' behaviors and actions

Step 3: Monitor, Learn, Optimize, Repeat

After successfully executing your personalization strategy, you need to continuously measure its effectiveness. Personas and consumer behavior change over time. The rules and triggers you set up for your automation platform work today, but that might not be the case in a year. Monitor performance to detect trends and changes so you can adjust your strategy as needed.

To ensure ongoing success, you also need to obtain early buy-in from decision makers on the overall process of delivering modular content and experiences. Then, develop a fast track for content approvals that will not slow your speed to market. An agile process is the way to go so that you can test, learn, and optimize quickly.
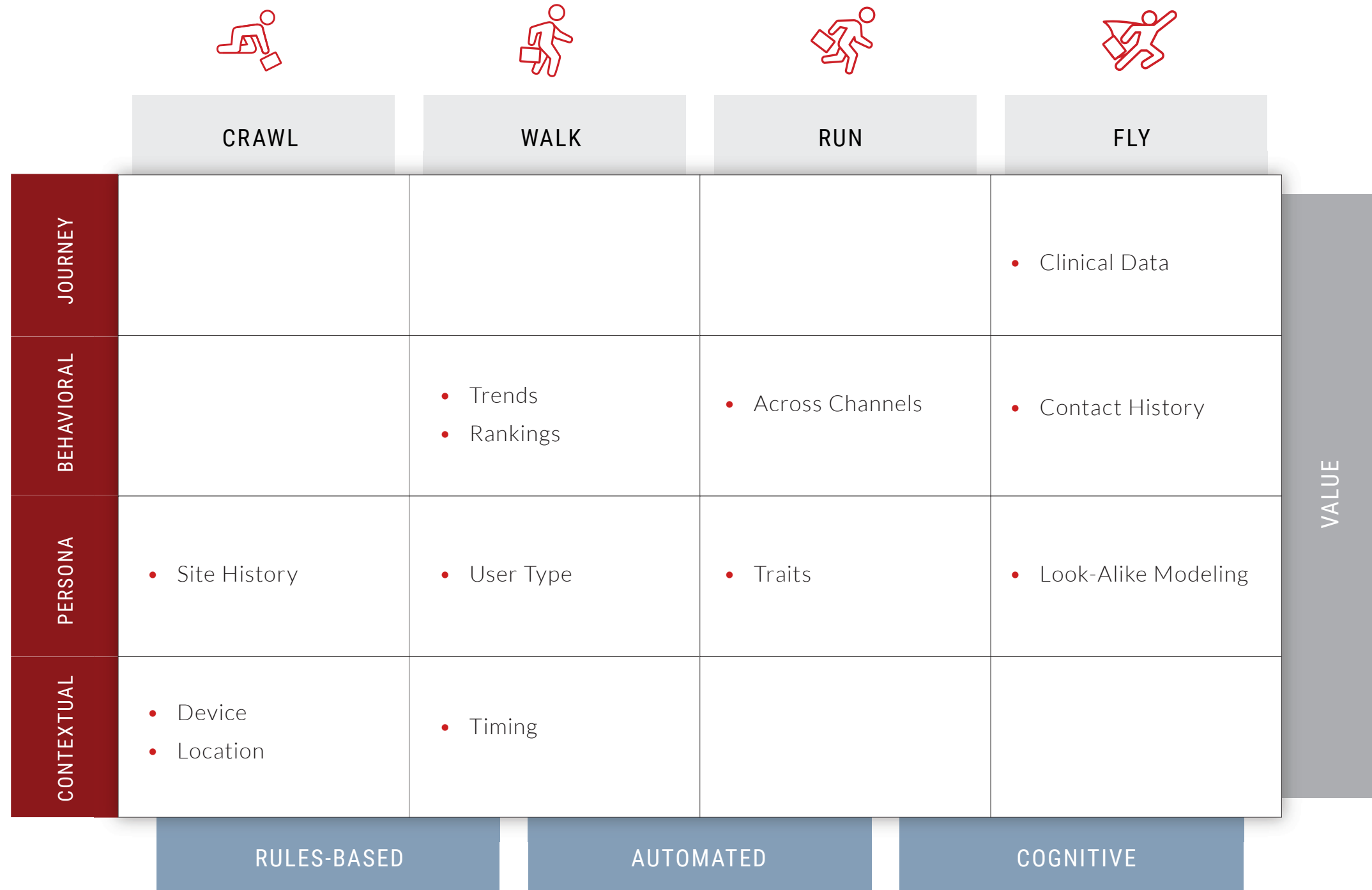
Getting Started: Crawl, Walk, Run, Fly

Context changes quickly in the digital world, which makes true optimization a continuous, automated process of testing and refining the ideal mix for each consumer in every context, adapting as new data arrives.

You don't have to jump into the deep end of personalization right away – nor should you. Instead, we recommend you first test the waters by delivering basic personalization and gradually advancing it as more data is acquired and analyzed.

Crawl, Walk, Run, and Fly are the phases along the Personalization Spectrum. Options within Acquia Digital Experience Platform have capabilities that align with each phase and can advance personalization from contextual to journey-based and include Adobe CMS and Acquia Campaign Studio for activation.

Maturity Matrix

	CRAWL	WALK	RUN	FLY
JOURNEY				• Clinical Data
BEHAVIORAL		• Trends • Rankings	• Across Channels	• Contact History
PERSONA	• Site History	• User Type	• Traits	• Look-Alike Modeling
CONTEXTUAL	• Device • Location	• Timing		

VALUE

RULES-BASED	AUTOMATED	COGNITIVE

Crawl

In addition to the robust environment that Acquia CMS provides, Acquia Personalization features allow you to:

- Present content based on location, device type, and site history

- Easily create alternative content areas in a friendly user interface

- Identify associated campaigns and patterns in content viewed to segment users into likely personas and determine the relevant content to display

Walk

Acquia Personalization goes beyond initial segmentation to

conduct tests that measure the effectiveness of your campaigns. With your initial personalization strategies as a foundation, Acquia Personalization can further support:

- Conducting rules-based targeting, A/B testing, and multivariate testing

- Delivering content and product recommendations to targeted segments based on augmented data in the user profile

These new strategies, in conjunction with detailed analytics, help to optimize and iterate on content so that you can adjust messaging and tactics to have the most impact.

Run

When you are ready to Run, begin to coordinate messaging across multiple channels with Acquia Campaign Studio. This allows you to define and influence the journey across across web, email, and text message channels. Leveraging Acquia Campaign Studios enables:

- Email and text follow-up to re-engage consumers

- Personalization based on email campaigns and actions from other channels

Acquia Campaign Studio can also aggregate your consumer segments and apply attributes, such as geo-location or referral sources, to create even more personalized experiences.

Fly

By the time you are ready to Fly, adding Acquia CDP allows you to dive deep into personalization that's based on the customer's behaviors and journey. At this point in time, you will probably be ready to ingest other data, such as clinical information, and dynamically merge it with marketing interactions in the Acquia CDP. This drives personalization across all touchpoints by:

- Dynamically creating new data segments with access to additional datasets, including clinical data

- Using look-alike modeling to build and apply personalized experiences based on the common traits of individuals or segments

As the dust of COVID-19 settles, public services and healthcare, among many other industries, will transform. Capabilities borne out of necessity – healthcare's commendable response to a global crisis – will help to drive the future of healthcare.

The response of many organizations has in part been communicated and shared through digital experiences. This digital communication is particularly important during a time when entire communities are being asked to stay home and minimize potential spread.

Finding the right digital foundation – one that will enable you to drive engaging, efficient experiences from beginning to end – will aid you in this transformation. Because, let's face it – providing a personalized experience at the start of a patient or member journey creates an expectation that those tailored experiences will continue as the journey progresses and evolves to include more digital care delivery.

A powerful digital foundation gives you personalization and more. Consider faster content development, digital documentation, easier enrollment, and streamlined approvals, to name a few.

While your organization may not yet deliver deeply personalized experiences, the potential is there. Partnering with a digital consultancy that specializes in healthcare solutions will help you reach that potential. Our experienced and award-winning team at Perficient will not only help you implement the solution, but also create a strategy to align people and processes to embrace it.

Let Perficient help you on your digital transformation journey.

Perficient is the leading global digital consultancy helping transform the world's largest enterprises and biggest brands. As a trusted end-to-end digital provider, Perficient partners with its Global 2000 and other large enterprise customers across North America to design and deliver digital transformation solutions that exceed customers' expectations, outpace the competition and transform their business.

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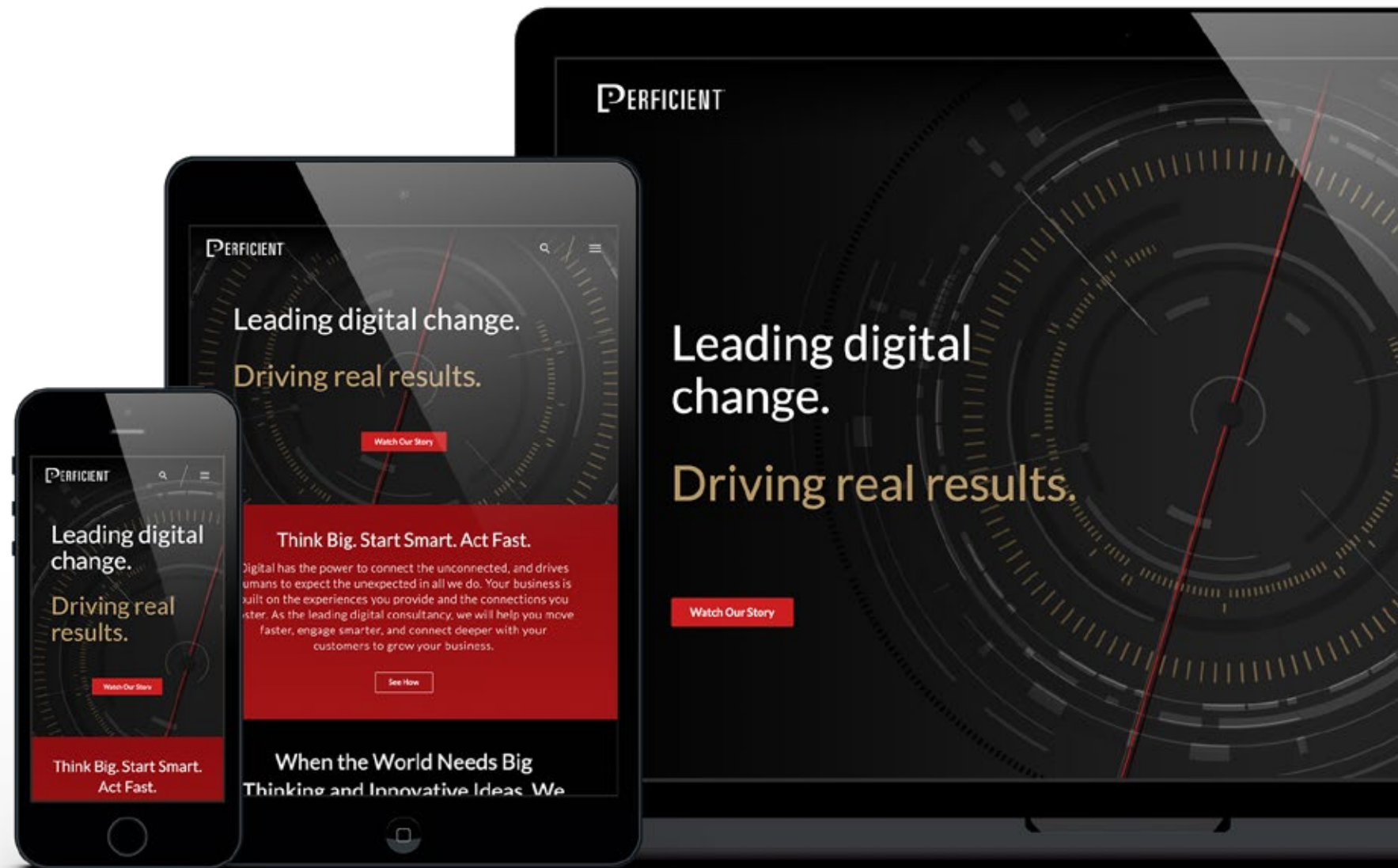
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