

# Adapting to The New Health Care Environment

## Attaining Operational Efficiency in Occupational Health and Urgent Care Services

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# Learning Objectives

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- Aligning user segments (SIC codes for occ med and patient demographics for urgent care)
- Transforming the clinic culture from employer-centric to patient-centric
- Understanding when and how to use a care map
- Enhancing the patient experience
- Attaining operational consistency in multi-clinic networks

# Changing Business Drivers

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## Occupational Medicine

- Proximity to density of business in industries that utilize occupational medicine.
- Convenience/accessibility to the employer.
- Sales and account management to create and foster employer relationships.
- Relationships with workers compensation payers, third-party administrators.
- Providers focused on prevention, injury outcomes, compliance, and cost containment.
- Detailed communication with the employer expanding scope of services provided.

## Urgent Care

- Proximity to density of “urgent care” demographics.
- Retail adjacencies, signage visibility, traffic counts, easy turn-in, ample parking.
- Paid advertising, referral relationships, and grassroots marketing to attract new patients.
- Group health payer contracts, provider directory listings.
- Providers willing to treat infections, women’s health issues, children, and to refer longitudinal conditions.
- Outstanding patient experience spurring repeat visits and positive word-of-mouth.

# Pure-Play Occupational Medicine Model

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# High-Utilization SIC Codes for Occupational Medicine

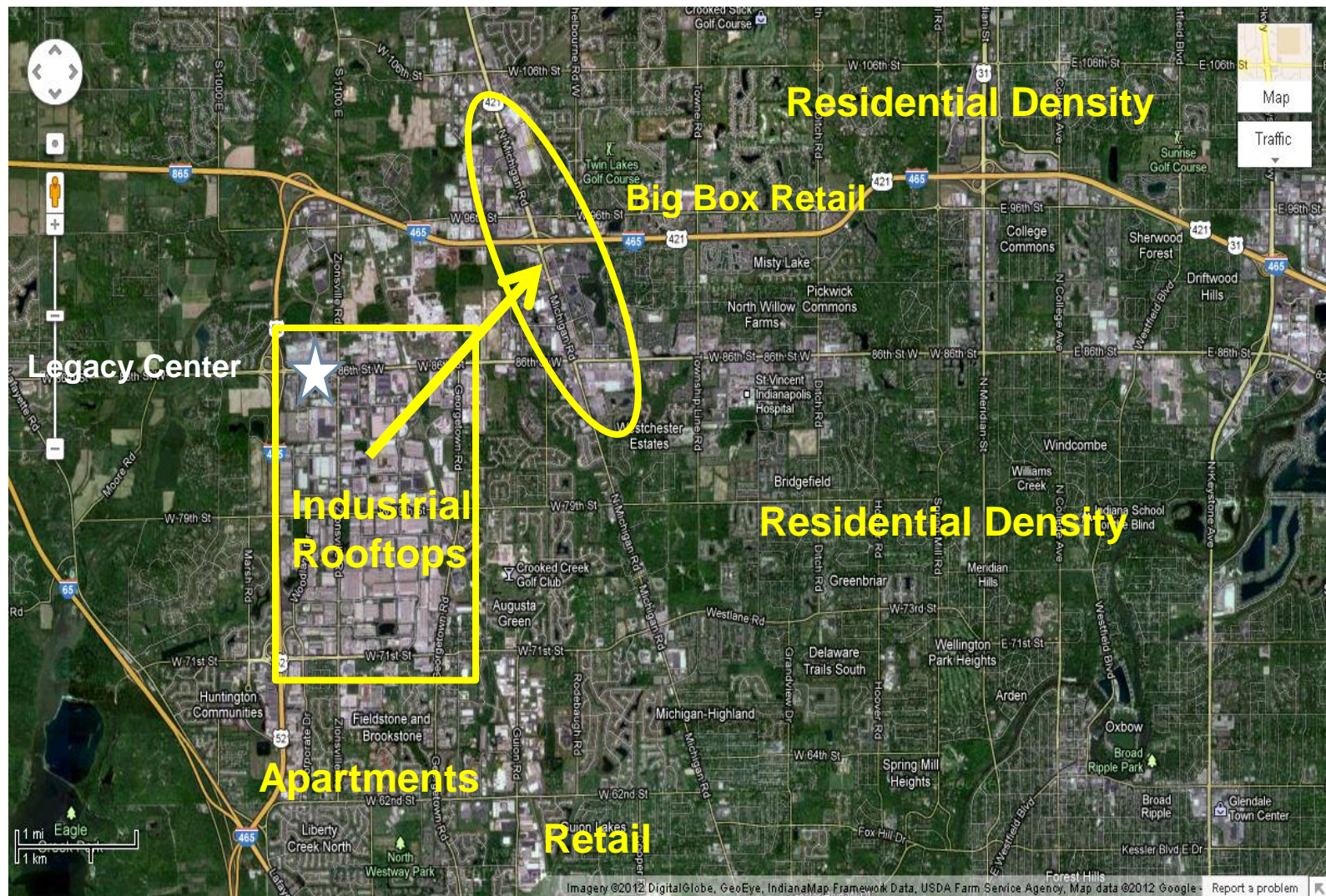
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# Focus on the Employer

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# Urgent Care Launch, 2006-2007

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# Urgent Care Marketing Plan

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## Employer Direct:

- Benefits Cost Savings Focus
- 300+ Person Sales Force
- 100,000 Employer Clients

## Conversion:

- Captive Audience
- 25,000 Patients per Day

## Acquisition:

- No Prior Relationship
- In-network Insurance
- Paid Advertising
- Grassroots Promotion



# Value of Positive Patient Experiences

- Urgent care is in the “patient satisfaction” business – in consumer eyes *comparable to* retailers, restaurants, banks, and other service providers.
- Long-term success requires capturing *repeat business* and generating *positive word of mouth*.
- Patients evaluate the *quality* of their urgent care visit based on *clinical outcomes* and their *feelings about the experience*.
- Patients who don't like the experience provided, don't value it, or don't think it meets their needs or expectations *won't come back*.

# First Impressions...

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# Waiting Room

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# Brand Identity: Utility, Efficiency and Outcomes

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# Refocus: The Patient Experience

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## Research

- Internal Assessment
- Primary -- Business and Consumer
- Secondary Research

## Brand Changes

- Mission, Vision Values
- Logo

## Infrastructure Changes

- Process
- Service Environment
- Service Delivery
- Measurement and Accountability

## Culture Changes

- Internal Communications
  - Awareness Campaign
  - Knowledge and Skills
  - Reinforcement
    - Orange Book
  - NPS Dashboard
- External Communications
  - Public Relations
  - Sales Messaging

# Research

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DISCOVER	DISCOVER	DISCOVER	DISCOVER
<p><b>Target</b> Environment Communicates the Brand</p> <p>Target provides better big box merchandise</p> <p>Cleanliness is next to Godliness</p> <p>Layout is next to cleanliness</p> <p>The sustainability says quality</p>	<p><b>Starbucks</b> Efficiency translates to image</p> <p>Mission is about coffee and customer service</p> <p>But operations enable customers to "grab a cup"</p> <p>Complex drinks made easier, quicker</p> <p>Inside and out</p>	<p><b>Minute Clinic</b> Innovative model is quick, affordable and convenient</p> <p>Medical attention. 8/10/10/10.</p> <p>Rapid growth and high customer satisfaction communicates their commitment</p> <p>Staffed by board-certified practitioners</p> <p>The better approach to diagnosing and treating common illnesses</p>	<p><b>Curves</b> Experiences expand audiences</p> <p>Typical gym appeal to hard bodies</p> <p>Play to psychology of out-of-shape women</p> <p>Remove the intimidation</p> <p>Make it simple, low-tech, inviting</p> <p>Accessible locations</p>
VISION	DISCOVER	UNRAVE	EVALUATE

Segment	Percentage	Key Characteristics
FREE BIRDS	6%	Mean Age 26, Mean Age 26. Affluent, married adults. Love outdoors, enjoy traveling on the go, searching activities and experiences that stand out from the rest of the herd.
SETTLED ELDERS	15%	Mean Age 67, Mean Age 67. Older, white singles with lower incomes. Lead teachers, artists, home-care providers.
RUGGED TRADITIONALISTS	7%	Mean Age 51, Mean Age 51. Blue collar older men with the college education and lower incomes. Based here or home improvements and working on their cars. Home life revolves around rock music, hunting, golf. TV sets with a picture frame nearby.
STRUGGLING SINGLES	10%	Mean Age 39, Mean Age 39. Low income singles in single parent households. Low education and negative consumption. Few who spend time at home.
HOME SOLDIERS	12%	Mean Age 44, Mean Age 44. White aged middle income parents with lower education. Value around the home and the community.
DYNAMIC DUOS & SUCCESSFUL SINGLES	11%	Mean Age 40, Mean Age 40. Affluent, married and/or widowed. Professionals who work around the house. Mean stars of the married and frequent visitors of the.
RENAISSANCE WOMAN	8%	Mean Age 47, Mean Age 47. Married, affluent, middle income with creative and mental careers. Active consumers who do it all. Frequent users of the internet and newspapers. Multiple sources of magazines.
TRIBE WIRED	7%	Mean Age 37, Mean Age 37. Young white singles, higher income. Strong social network.
FUN-ATICS	10%	Mean Age 39, Mean Age 39. Young, educated singles. Strong household and social network. They do it all.
PRIORITY PARENTS	13%	Mean Age 41, Mean Age 41. Parents with large families, with children of all ages. Educational family network of teachers and librarians.

Most aligned with "Un-Enlightened"

Most aligned with "Un-Enlightened"

VISION DISCOVER UNRAVE EVALUATE

- Conducted consumer focus groups
- Conducted Voice of the Customer, Patient, and Colleague focus groups
- Conducted messaging review for specific demographics
- Benchmarked best-in-class customer care organizations (both retail and medical)



# Research Findings

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*Consumers feel health care companies focus too much on their financial bottom lines, rather than a dedication to individual patient care.*



The combination of a retail experience with quality health care is a unique offering

# Mission, Vision, and Values

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## Our Mission

Improving America's health, one patient at a time.

## Our Vision

We will redefine patient care by treating individuals to a welcoming, respectful, and skillful experience.

We will raise the standard of health by putting individuals first, treating them with clinical excellence, and focusing on their ongoing wellness.

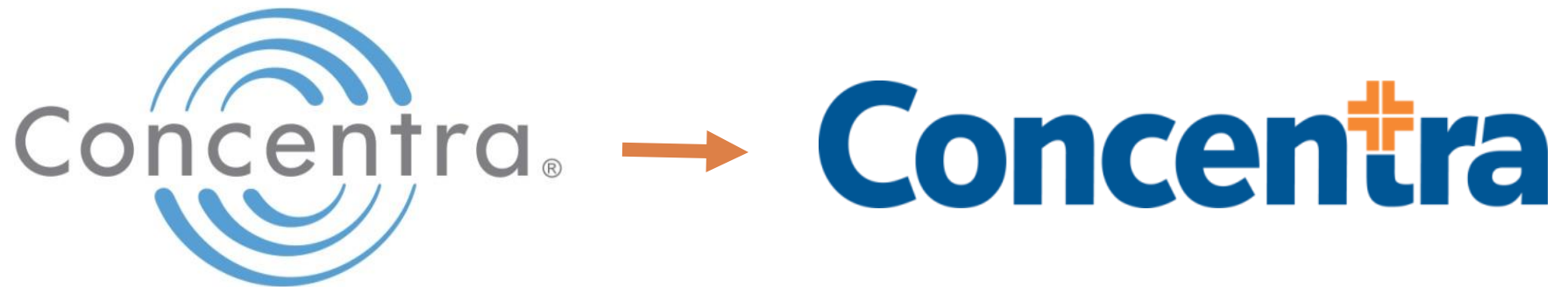
We will succeed through innovation and the expertise of our colleagues in an environment of trust, support, and community.

## Our Core Values

A healing focus  
A selfless heart  
A tireless resolve

# Changing the Mark

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# Infrastructure Changes

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Process	Service Environment	Service Delivery	Measurement/ Accountability
● Reengineer Processes	● Facility “Look and Feel”	● Job Redefinition	● NPS™ Measurement
● Remove Non-Patient-Related Activity From Centers	● In-center Marketing	● Hiring/Firing (Predictive Index)	● Dashboard
● Drug Screen Automation Process	● New Uniforms	● On-boarding	
● Centralize, Automate	● Patient/Lobby Room Initiative	● Training	
	● External Signage	● Coaching	
		● Recognition & Reward	

# Service Delivery

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- Hiring/Firing (Predictive Index)
- On-boarding
- Training/Modeling
- Coaching
- Recognition & Reward
- Job Redefinition

# The Orange Book

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*The Orange Book is a little book with a big goal: to redefine the patient experience by performing welcoming, respectful, skillful actions -- every colleague, every day, every location -- for the over 7.5 million patients Concentra sees every year.*



# Forecasting Model Components

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- Households or Establishments
- Population or Employees
- Demographics or SIC Codes
- Propensity to Utilize Services

**Density:  
Trade Area Factors**

- Adjacencies/Draw
- Signage Visibility
- Traffic Counts/Accessibility
- Aesthetics

**Site:  
Real Estate Factors**

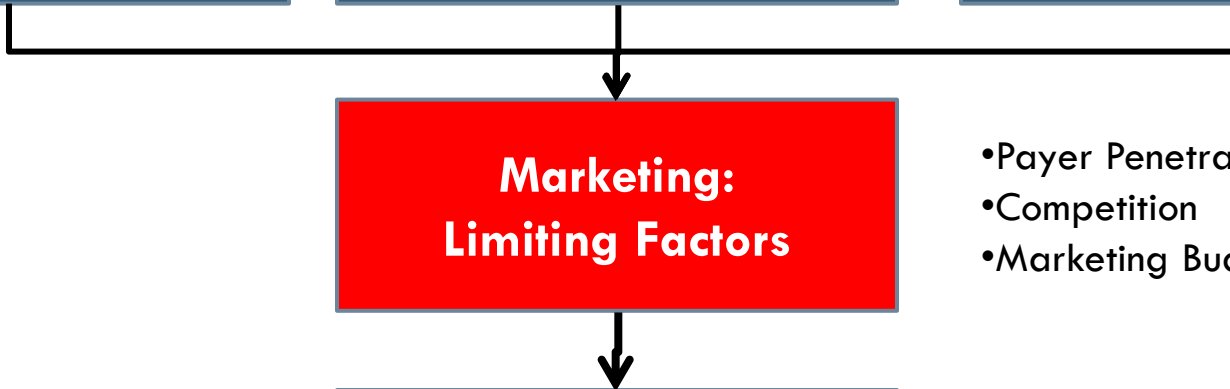
- Operating Hours
- Medical Providers
- Equipment/Training/Capabilities
- Customer Service

**Operations:  
Delivery Factors**

**Marketing:  
Limiting Factors**

- Payer Penetration
- Competition
- Marketing Budget

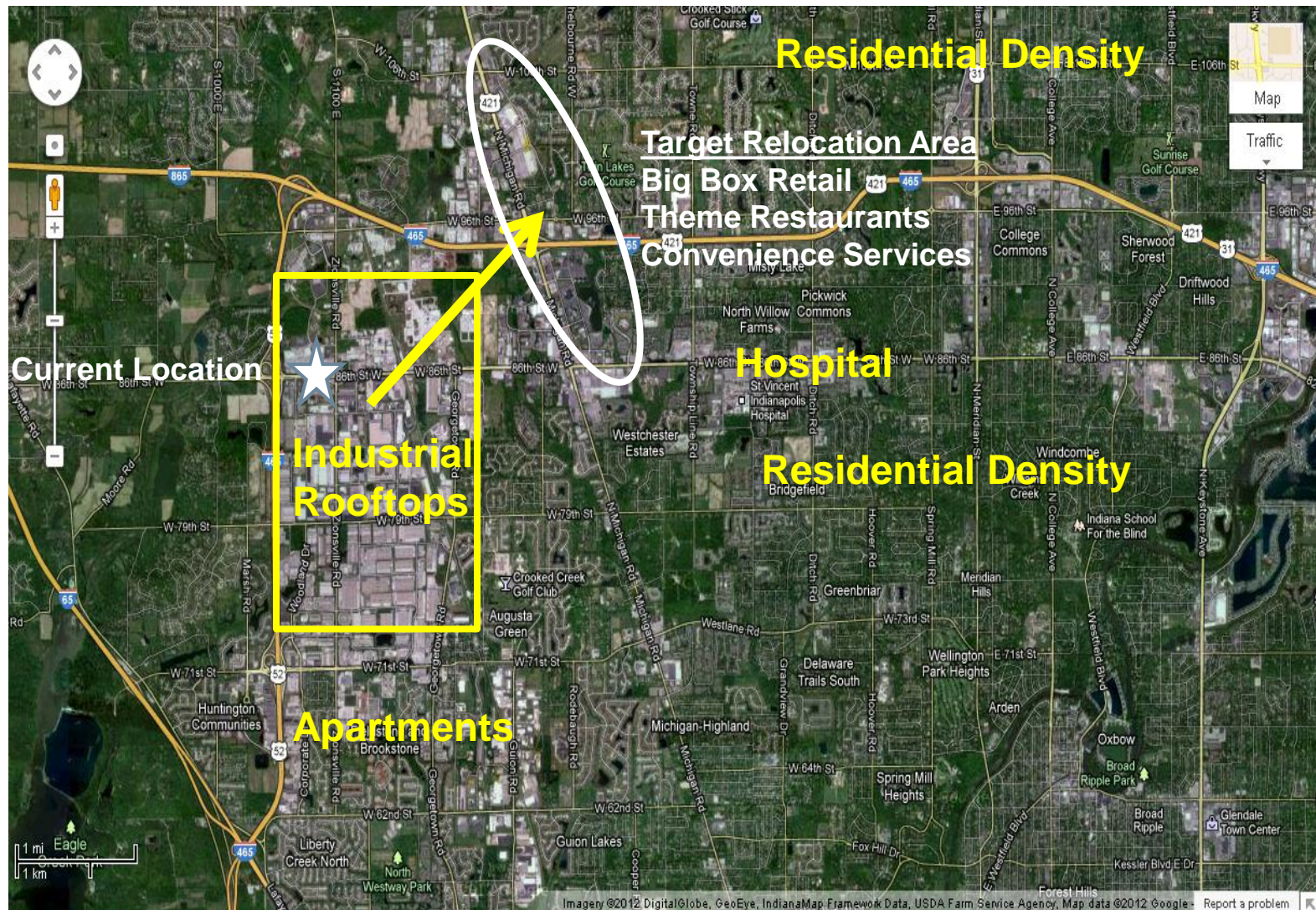
**Volume Projection**





# Addressing the Real Estate

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# Urgent Care Demographics

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Married Couple with Children Present



College Graduate Age 35-54



Owner-occupied Single Family Housing



Growing Suburbs of Major Cities

Member ID

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**PPO**

Subscriber: <b>JOHN Q SAMPLEMEMBER</b>	Coverage Type: <b>ECH</b>
Group Name: <b>SAMPLEGROUP</b>	Group ID: <b>123456</b>
Member I.D. Member Name:	Effective Date
<b>555550667 01 JOHN Q SAMPLEMEMBER</b>	<b>01/01/2006</b>
<b>555550667 02 JANE B SAMPLEMEMBER</b>	<b>01/01/2006</b>
<b>555550667 04 JAKE C SAMPLEMEMBER</b>	<b>01/01/2006</b>
<b>555550667 05 WILLIS R SAMPLEMEMBER</b>	<b>01/01/2006</b>

Ofc Visit Co-pay	ER Co-pay	Pharmacy Benefit
\$5	\$10	\$5/\$10/\$40/20%

Pharmacists: 1-800-865-8715  
ANSI BIN # 610649  
PCN # 03190000

Employer-Provided Health Insurance



Household Income \$50,000 to \$100,000

# Urgent Care Retail Adjacencies

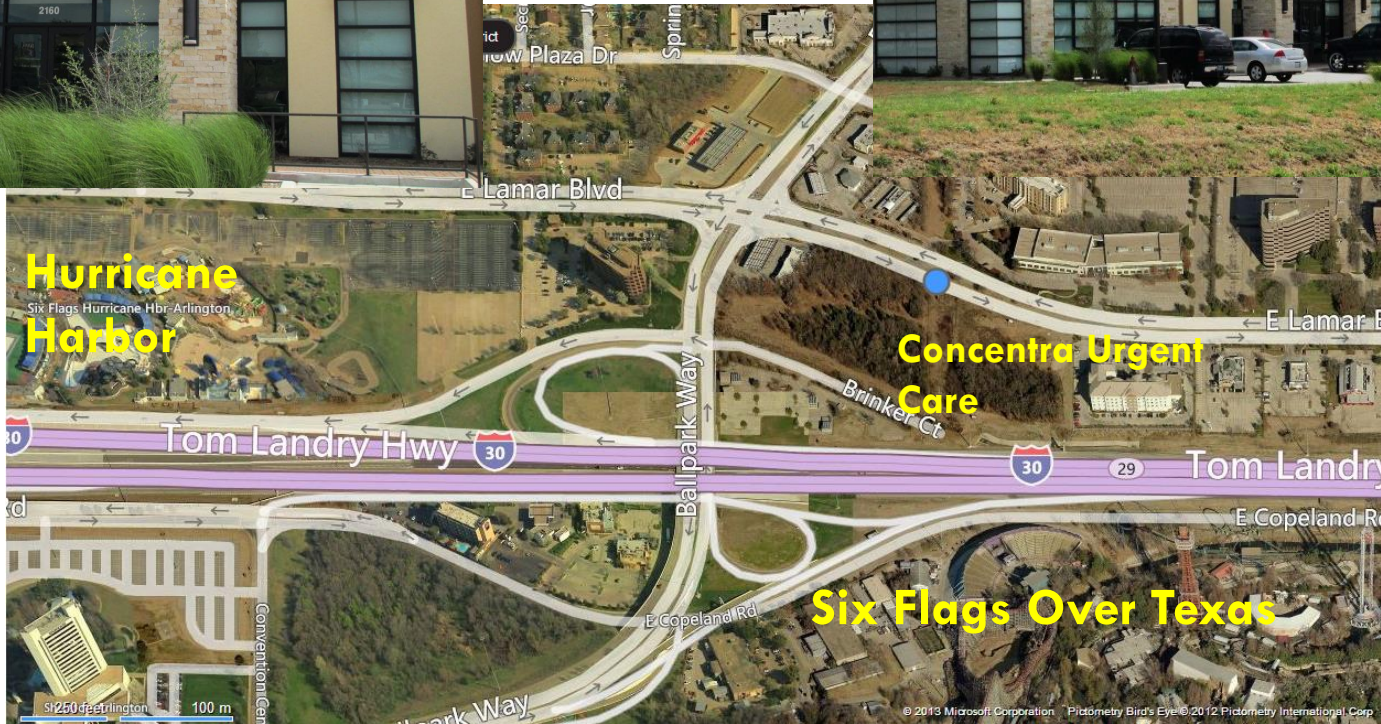
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# Traffic Counts and Signage Visibility

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# Signature Center: Suburban Retail

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# Urban Streetfront

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# Light Industrial/Flex-Space

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# First Impressions...

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# “Welcoming Room”

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# Front Office

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# Clinical Corridor

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# Procedure Room

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# Provider Workstation

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# X-Ray

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# Consistency in Signage

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# Colleague Uniforms

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# Measurement: Net Promoter Score

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**The Ultimate Question --“on a scale of 1 to 10, rank likelihood to recommend us to others.”**



**Undermines our future business.**

**0-6: Detractors**



**Easily wooed by the competition.**

**7-8: Passives**



**Extends our sales/marketing.**

**9-10: Promoters**

**The goal is to increase net promoter score by “neutralizing” detractors and “converting” passives.**

# Accountability: NPS Dashboard

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WCL - Windows Internet Explorer  
https://portal.frankincovey.com/

File Edit View Favorites Tools Help

WCL

Concentra  
**VitalSigns**

Dashboard | Coach Me | Print | Tools | Logout

Check My Scores | Connect With Customers | Engage The Team

Select a Name  
\* = My Unit  
Enter unit # or name...

▼ National  
▶ AMS National  
▶ Midwest Zone  
▶ Northeast Zone  
▼ South Central Zone  
▼ Colorado/Utah Area  
Aurora North - 612  
Aurora Southeast - ...  
Boulder - 641  
Downtown Denver - ...  
Fort Collins - 618  
Lakewood - 620  
Littleton - 625  
North Denver - 613  
Redwood - 4603  
Rockrimmon - 631  
Sandy - 4602  
South Academy - 632  
South Broadway - 614  
Stapleton - 644  
Tech Center - 623  
Thornton - 622  
▶ Houston/Louisiana A...  
▶ New Mexico/W. Texas...  
▶ North Texas Area

### Check My Scores

Patient Experience Rating (%9-10)  
Last 3 Months **64** (Sep-Nov)

### Key Metrics

	Month	YTD
Ebitda	18%	25%
UC Net Rev	\$557.1k	\$5.496M
UC Education	64%	
# of Employers	414	
Avg Rev/Employer	\$4,899	

Colleague Engagement Index  
CEI<sup>2</sup> **79** 05/31/10

### Connect With Customers

Call Status  
1 Call to Make  
1 Call Overdue

### Calls

Colorado/Utah Area	0 Calls to Make
Houston/Louisiana Area	0 Calls to Make
New Mexico/W. Texas Area	0 Calls to Make
North Texas Area	0 Calls to Make
Oklahoma Area	0 Calls to Make

View All Calls

### Engage The Team

Goal  
Improve the Patient Experience Rating for the South Central from 62 to 67% with no center below 55% by January 15th, 2011 by maximizing ALT/CLT cohesion and PACE effectiveness.

View Details

### Accountability

CLT PACE Meeting	12%
Colleague PACE Meeting	9%



# NPS: April, 2008

40

Net Promoter<sup>®</sup> Score 10%



**Detractors: 35%**

**Passives: 20%**

**Promoters: 45%**

# NPS: August, 2013

41

Net Promoter® Score 63%



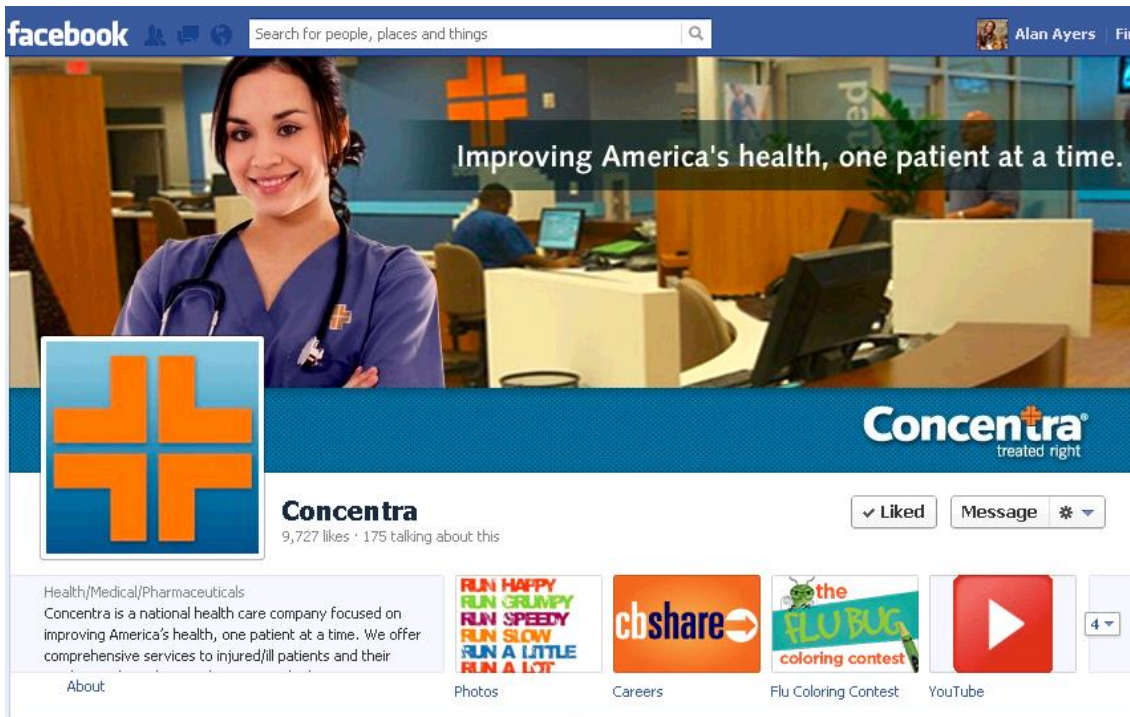
**Detractors: 10%**

**Passives: 17%**

**Promoters: 73%**

# Spreading the Word

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- Radio
- Social Media
- In-Center
- Billboards
- Paid Search
- Workplace
- Direct Mail
- Organic Search
- Grassroots
- Shared Mail
- Banner Ads



# Contact Information

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