



# Urgent Care Regional Conference

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July 14-15, 2016

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## Transitioning Satisfied Patients into Loyal Fans

Strategies for Gaining Market and Mind Share in an  
Increasingly Crowded Urgent Care Marketplace

Alan A. Ayers, MBA, MAcc  
Vice President, Strategic Initiatives  
Practice Velocity, LLC



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## Urgent Care

Retail-oriented delivery channel for low-acuity medical services differentiated from the ED and primary care by:

- High-traffic, high visibility locations
- Extended evening and weekend hours
- Walk-in, on-demand convenience
- Short waits with rapid throughput
- Lower cost than the ED
- Customer service emphasis





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## Saturation of Major Markets



Charleston, SC Population: 127,000 (664,000 in MSA)

Number of Urgent Care Centers: 44



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## The Sea of Sameness



Consumers generally view all urgent care centers as “equal.”  
Few centers have established differentiated brands.



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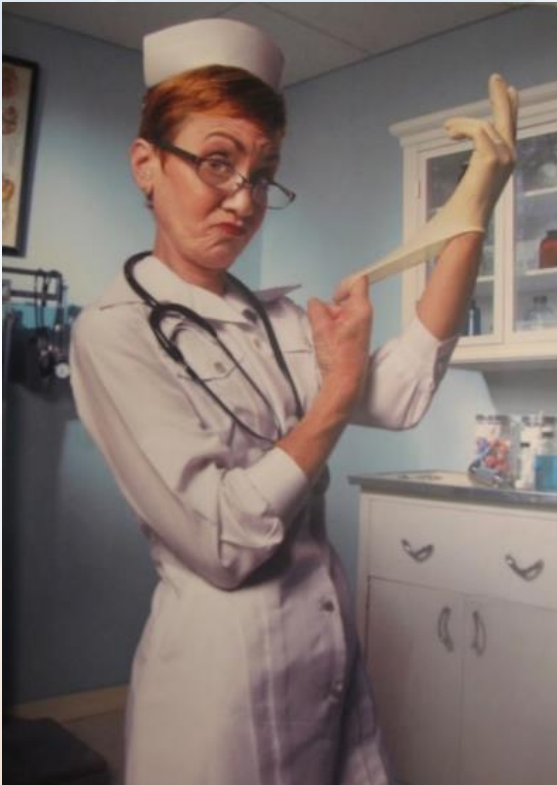
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## What Business Are You In?



Merely delivering a “service” makes for a commodity provider that by definition has no brand loyalty and no competitive advantage.

Success in urgent care requires resolving the medical problem that is the reason for the patient’s visit—efficiently and courteously—in a way that creates a *positive emotional connection* with the patient.



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## 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 visits 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*.





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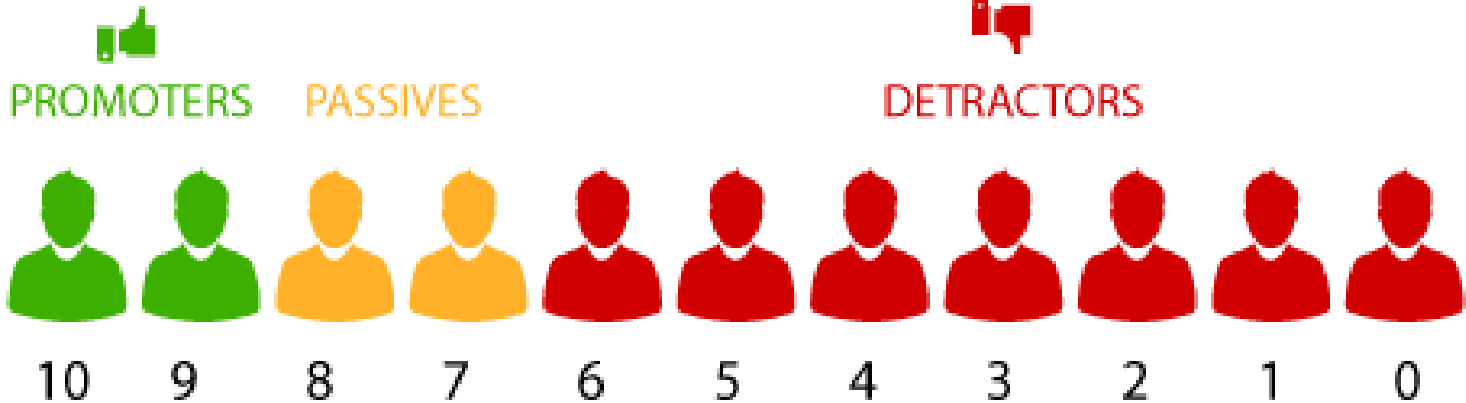
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## Net Promoter Score

“How likely are you to recommend us?”



$$NPS = \% \text{ PROMOTERS} - \% \text{ DETRACTORS}$$





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## New Era of Word of Mouth Marketing



- A “good experience” is defined as:
  - Minimal hassle with processes, systems, and policies
  - No surprises on payment or financial terms
  - Minimal wait times and total time invested
  - Employee engagement in customer service
  - Medical outcomes -- value for the price paid
- Patients with negative experiences will tell others, complain to external agencies, and switch to competitors.
- Internet social media has accelerated the diffusion of good and bad experiences.
- Reach has expanded from a handful of “real” friends to potentially thousands of “virtual” friends.





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# Differentiation in Retail





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## Differentiation in Retail, cont'd.





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## Southwest Airlines



### The Great Fare War of 1973

Dallas to Houston:

- \$13 Braniff Fare Sale
- \$17 Operating Cost
- \$20 Southwest Regular Price
- \$26 Southwest Promotion\*

\*80% of passengers chose the higher fare

33 consecutive years of profitability





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## Differentiation is not...

What urgent care typically markets:

- What's important to doctors
- What patients can't see or understand
- Board certified physicians
- Digital x-ray, CLIA-certified lab, and/or EKG on-site
- Electronic medical record
- In-network insurance provider



A screenshot of the CHI Health Virtual Care website. The header features the CHI Health logo and the text "Virtual house call 24/7 for \$10" with a "GET CARE NOW" button. Below the header, there is a section titled "Virtual CARE" with a "Learn More About Virtual Care | FAQs" link. The main content area is titled "Virtual Care: Phone and Video Chat Health Care" and includes text about virtual care services, such as "Sore throats, sinus infections, coughs and allergic reactions don't make appointments. You shouldn't have to either. So if you need urgent care, consider receiving that care from the comfort of your own home. Call or visit us online. No appointment needed." and "No Appointment Necessary". There is also a "Get Care Now" button and a "\$10 for a limited time" badge. An illustration of a hand interacting with a tablet is shown on the right side of the page.



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## CareNow Web Check-In





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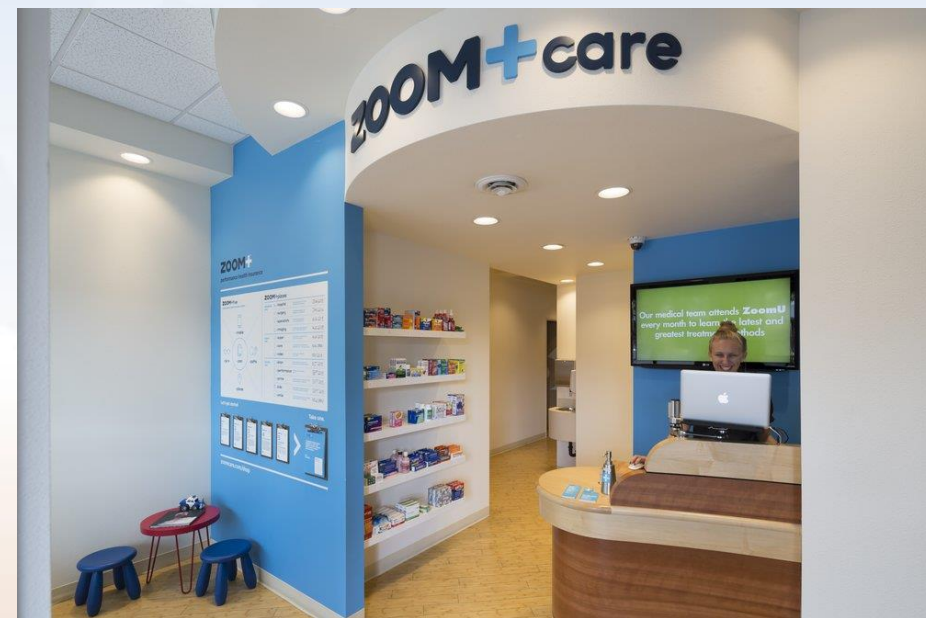
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## Zoom+: Integrated Delivery System on an Urgent Care Platform





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# Fast Pace: Focus on Rural Markets

A screenshot of the Fast Pace Urgent Care Clinic website. The page features a navigation bar with links for Home, Locations, Services, Pricing &amp; Insurance, Contact, About Us, and Careers. The main content area has a large image of a clinic building with the text "Urgent, Walk-In and Primary Care Services" and "FAST PACE URGENT CARE CLINIC". Below this is a search bar for "Find the Closest Clinic" with a "Submit" button and a "View All Locations" link. There are three columns of text: "How We Help" (dedicated to providing primary, walk-in and urgent care), "Payment Flexibility" (strives to create easier access to convenient and affordable health care), "Treatment" (offers a wide variety of treatment options), "Prevention &amp; Wellness" (strives to keep patients healthy), "Occupational Health" (provides much more than urgent care), and "Monitoring &amp; Management" (helps with conditions like acid reflux, asthma, diabetes, blood pressure, cholesterol, and much more).



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# Kaiser Permanente: Raising Urgent Care Acuity in a Capitated System



## Kaiser Permanente Urgent Care

### VIRGINIA

- Reston Urgent Care**  
1890 Metro Center Drive, Reston, VA 20190
- Tysons Corner Urgent Care Plus 24/7**  
8008 Westpark Drive, McLean, VA 22102
- Woodbridge Urgent Care**  
14139 Potomac Mills Road, Woodbridge, VA 22192

### MARYLAND

- Camp Springs Urgent Care**  
6104 Old Branch Ave., Temple Hills, MD 20748
- Gaithersburg Urgent Care Plus 24/7**  
655 Watkins Mill Road, Gaithersburg, MD 20879
- Kensington Urgent Care**  
10810 Connecticut Ave., Kensington, MD 20895
- Largo Urgent Care Plus 24/7**  
1221 Mercantile Lane, Largo, MD 20774
- South Baltimore County Urgent Care Plus 24/7**  
1701 Twin Springs Road, Halethorpe, MD 21227
- White Marsh Urgent Care**  
4920 Campbell Blvd., Nottingham, MD 21236

### WASHINGTON, D.C.

- Capitol Hill Urgent Care Plus 24/7**  
700 2nd St., N.E., Washington, D.C. 20002

## Kaiser Permanente Core Hospitals

### VIRGINIA

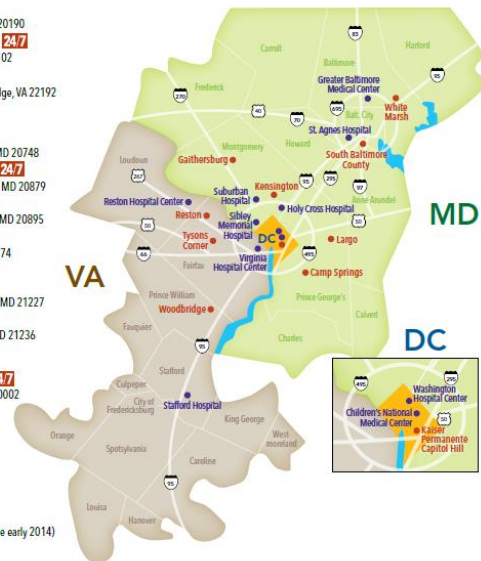
- Reston Hospital Center
- Stafford Hospital Center (available early 2014)
- Virginia Hospital Center

### MARYLAND

- Greater Baltimore Medical Center
- Holy Cross Hospital
- St. Agnes Hospital
- Suburban Hospital

### WASHINGTON, D.C.

- Children's National Hospital Center
- Sibley Memorial Hospital (labor and delivery only)
- Washington Hospital Center







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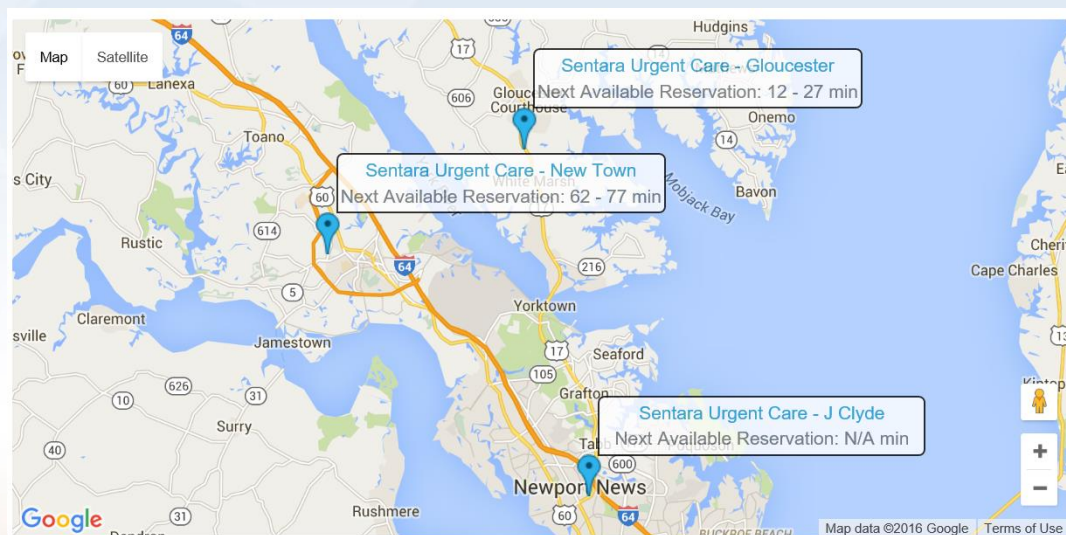
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# Sentara: Marketing Wait Times, Patient Satisfaction Scores



**Clockwise.MD**

#	Name	Type	Call Back Time
1	John S	Walk-in	14 - 24 Minutes
2	Jane S	Walk-in	28 - 30 Minutes
3	John D	Online	
4	Jane D	Walk-in	
5	Phillip H	Walk-in	

Powered by Clockwise.MD



## Sentara Urgent Care - New Town

4374 New Town Avenue  
Williamsburg, VA 23188

[\(View Map\)](#)

757-259-1900

★★★★☆ 4.7 out of 5

Next Available Reservation: 55 - 70 min

[RESERVE MY SPOT](#)



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# Trillium Health: Urgent Care Door to the Community



Different,  
Together.

We are intentionally different, caring for your health together.  
For over 30 years we've provided primary care services to our patients. And now it's time we cared for you.





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## Applying Service Industry Concepts to Urgent Care: People and Culture



- In retail, everyone is a marketer. Everyone should look at how everything in the organization impacts the customer.
- Health care has an inherent advantage over other service *industries*—*people go into health care to help people*.
- Leading people to deliver great service entails:
  - Developing a patient-focused culture
  - Positive energy, teamwork
  - Systems, processes, and policies to drive throughput
  - Transparency in financials, key performance indicators
  - Gamification of increased profits, cost savings



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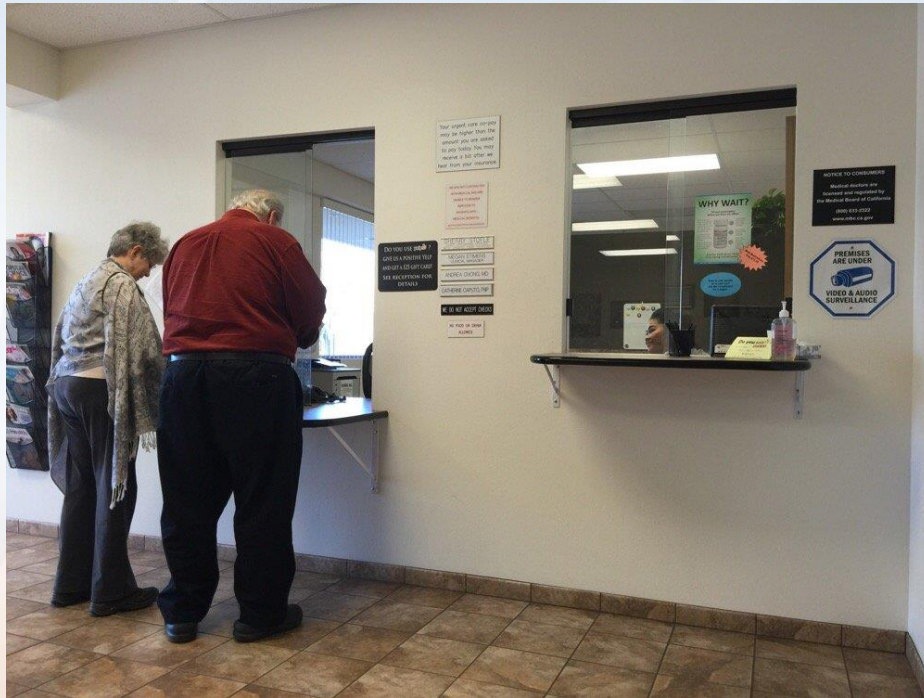
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## First Impressions: Registration and Payment





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## What Patients Want and Expect



Focus on Throughput: Practicing Urgent Care Medicine,  
Maximizing Provider Efficiency, Reducing Non-Value Added Activities



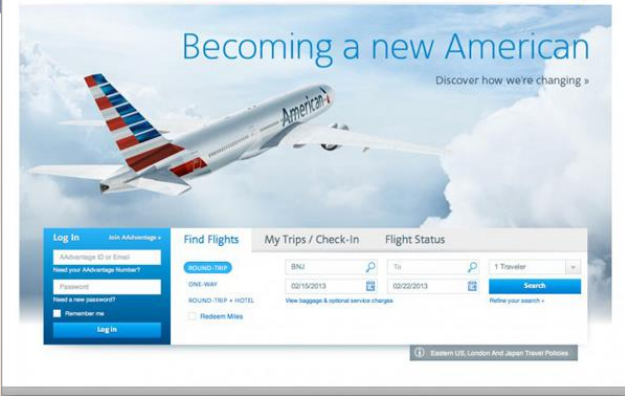
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# Functional Shifting





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## Contact Information



Alan A. Ayers, MBA, MAcc

Vice President of Strategic Initiatives

Practice Velocity, LLC

(779) 888-0734

[aayers@practicevelocity.com](mailto:aayers@practicevelocity.com)