Patient Navigation:

Leading the New Wave of Healthcare Consumerism

The most effective way to retain more patients, attract new ones, and improve outcomes

Overview

Improving the healthcare consumer experience has never been more important for healthcare organizations. From small primary care offices to large systems, healthcare leaders across the continuum are striving to create more personalized, patient-centered experiences.

Consumers are demanding these changes, expecting the same level of service and personalization that they receive from entities such as Amazon, Whole Foods, and Netflix. Healthcare organizations that meet these expectations retain more patients and acquire new ones; those that don't meet these expectations see their revenue fall. In fact, a recent study from Accenture found that healthcare organizations that provided a superior customer experience gained net margins that were 50 percent higher than those that delivered an average customer experience.[1]

Payers are also stepping up the pressure on healthcare organizations to improve the consumer experience, tying more and more payment to improved quality, reduced costs, and greater patient satisfaction. Improving the consumer experience supports all three objectives, because it leads to higher patient adherence to treatment plans, shorter lengths of stay, and reduced readmissions.[2]

To improve the consumer experience, healthcare organizations are exploring several approaches, including hiring chief experience officers, providing additional patient-relations related training, and making infrastructure improvements. But a growing number are also implementing patient navigation programs, which provide consumers with more personalized outreach more often throughout the continuum of care.

In March 2019, Sage Growth Partners, a Baltimore-based healthcare consultancy, surveyed 100 healthcare executives to assess how they are attempting to improve the healthcare experience and determine which approaches are most effective. Here are the results.

About The Respondents

LEADERSHIP ROLES

Survey respondents represented a variety of C-suite titles, including CEOs (22 percent), COOs (20 percent), CNOs (12 percent), chief quality officers (9 percent), and CMOs (7 percent). Respondents also included chief strategy officers, chief transformation officers, chief experience officers, and chief innovation officers.
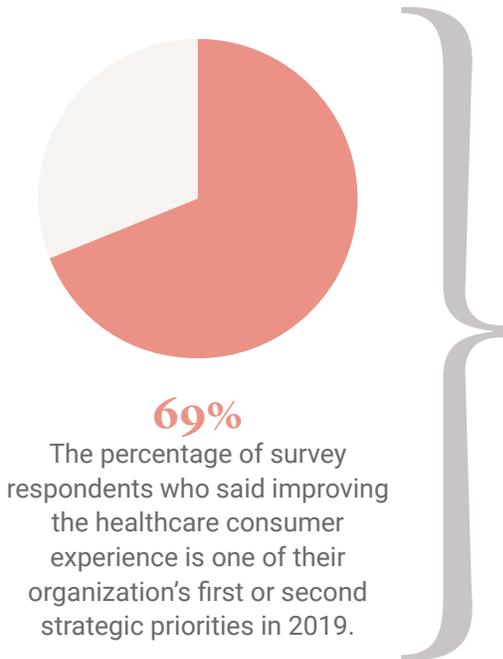
ORGANIZATION TYPES

Most respondents (80 percent) were part of a health system or integrated delivery network. They worked in organizations such as community hospitals, short-term acute care hospitals, specialty hospitals, children's hospitals, rehabilitation hospitals, and psychiatric hospitals.

COMPETITIVE LANDSCAPE

Sixty-four percent of respondents were in highly competitive markets, 33 percent were in moderately competitive markets, and 3 percent were in non-competitive markets.

Executive summary: Patient navigation helps health systems improve engagement, outcomes, and retention

69%
The percentage of survey respondents who said improving the healthcare consumer experience is one of their organization's first or second strategic priorities in 2019.

Common approaches to improve the consumer experience include:

Leveraging technology, such as EHRs (90 percent of respondents) and patient portals (83 percent).

Making staffing changes, such as hiring patient experience officers (32 percent) and adding more patient relations training (70 percent).

Implementing patient navigation programs, through which patients receive personalized, direct communication to help them navigate their healthcare journeys (57 percent).

Survey respondents who have implemented patient navigation programs reported the highest positive effects.

Top benefits of navigation programs, according to survey respondents, include:

1. **Improved quality and satisfaction.** Consumers are more engaged, better prepared for services, and feel more connected to providers.
2. **Reduced costs.** Improved quality leads to shorter lengths of stay, fewer readmissions, and less use of unnecessary healthcare services.
3. **Growth and higher revenue.** Improved quality and satisfaction lead to consumer retention and growth.
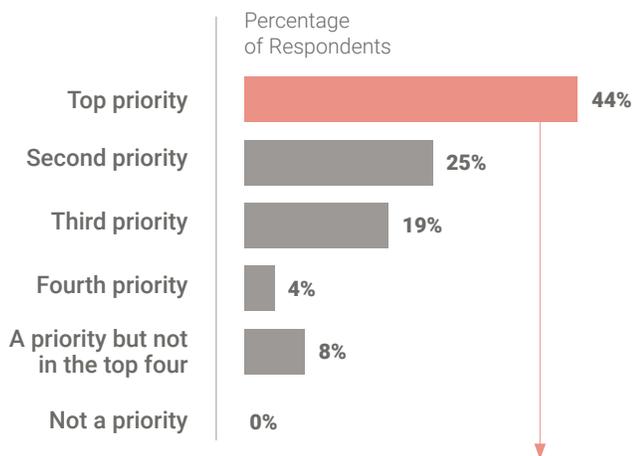
The benefits of patient navigation programs increase when they:

1. **Use nonclinical staff members** (and don't rely solely on clinical staff)
2. **Are scalable** (can be implemented systemwide)
3. **Are supported by technology** (such as customer relationship management platforms) that enable clinical and nonclinical staff to document characteristics about each healthcare consumer and continually build on their understanding of them.

The healthcare consumer experience is a growing priority for healthcare executives

Nearly half of respondents said improving the healthcare consumer experience is a top strategic priority in 2019.

Where does the healthcare consumer experience rank within your organization as a strategic priority for 2019?

Percentage of Respondents

Top priority	44%
Second priority	25%
Third priority	19%
Fourth priority	4%
A priority but not in the top four	8%
Not a priority	0%

Respondents from highly competitive markets were more likely to say it is a top strategic priority (55 percent). Only 2 percent of these respondents said it isn't among their top four priorities.

The top benefits survey respondents said they hope to gain from improving the consumer experience:

1. Improve clinical outcomes

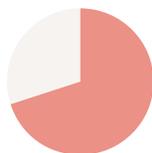**2. Improve patient loyalty/ retention/relationships**

3. Increase patient engagement
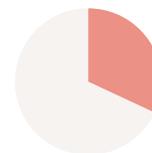
4. Increase market share

Common consumer experience improvement initiatives include staffing changes, technology, and patient navigation

MAKING STAFFING CHANGES

70%
The percentage of survey respondents who have implemented additional staff and physician training to improve interactions with patients.
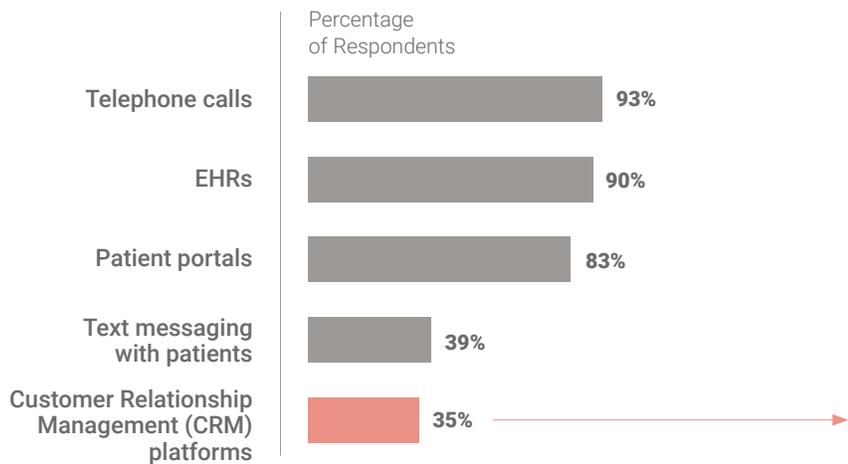
32%
The percentage of respondents with a C-suite executive whose sole role is improving the healthcare consumer experience (such as a chief experience officer).

What technology is leveraged by your organization to improve the experience of the healthcare consumer?

Percentage of Respondents

|	
Telephone calls	93%
EHRs	90%
Patient portals	83%
Text messaging with patients	39%
Customer Relationship Management (CRM) platforms	35%

SCALABLE STRATEGY

Adoption of relationship management technology is a growing trend amongst leading healthcare organizations as they strive for systemwide improvements in the consumer experience. This technology helps stitch together disparate customer data and improvement efforts to foster a more informed approach to supporting customers longitudinally.

Of respondents who said they are not yet using text messaging or CRM platforms, 44 percent plan to use text messaging in the future; 39 percent plan to implement a CRM.
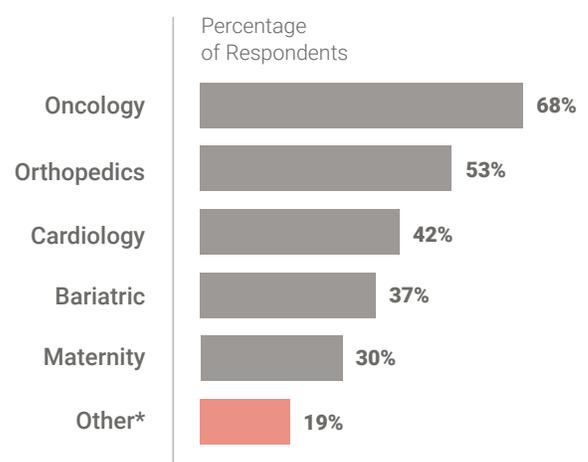

IMPLEMENTING PATIENT NAVIGATION PROGRAMS

Does your organization have a patient navigation program?

Yes
57%

No
43%
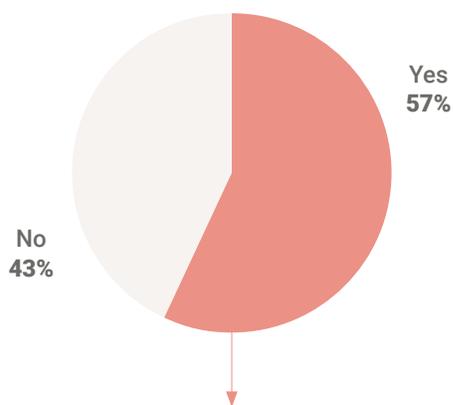
Use of patient navigation programs is much higher (69%) among survey respondents who said improving the healthcare consumer experience is a top strategic priority in 2019.

In what service lines is your organization utilizing patient navigation programs?

Percentage of Respondents

Oncology	68%
Orthopedics	53%
Cardiology	42%
Bariatric	37%
Maternity	30%
Other*	19%

*Other responses included **primary care**, transitional care, and psychiatry
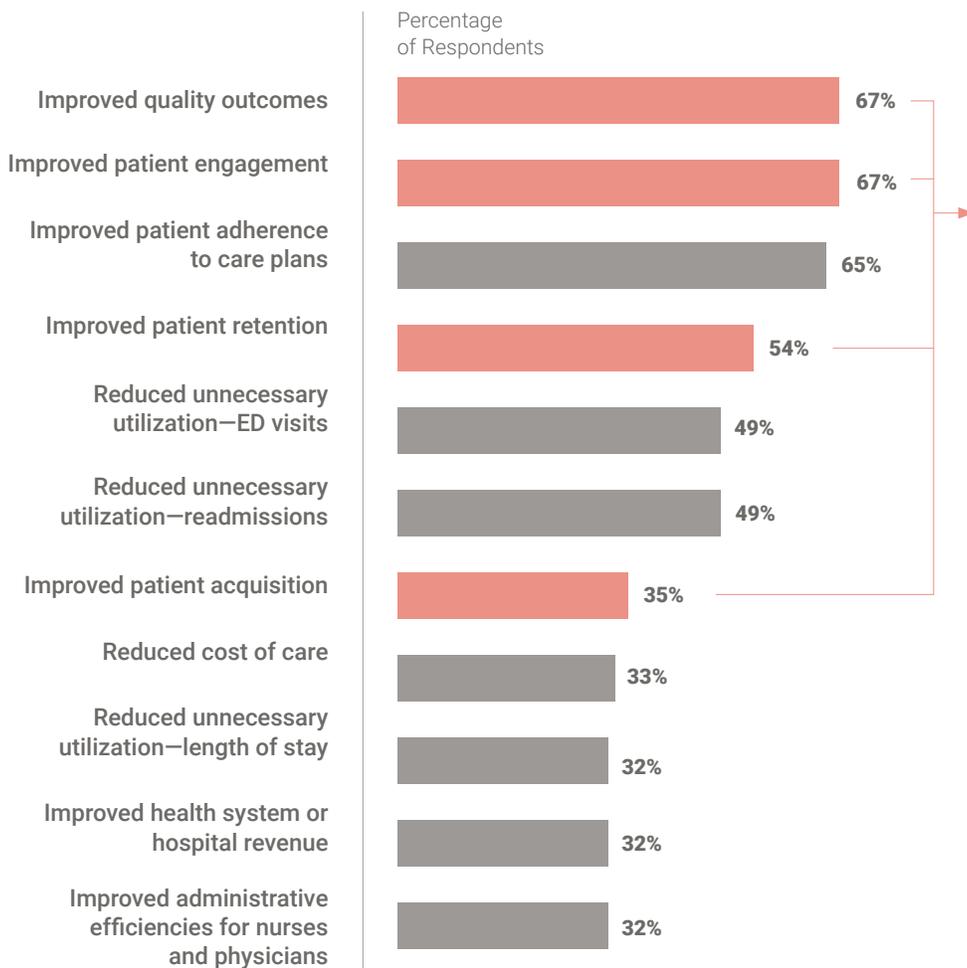
Patient navigation programs can be particularly helpful in primary care settings, both for practice growth and for improving patient care.

For example, navigators can assist with conducting personalized outreach to certain patients, such as those with chronic conditions or those who are in a key risk stratification category. This outreach, which might include following up about specialist appointments or regular check-in calls and texts, can enhance patient relationships and lead to more positive outcomes.

Respondents report significant benefits from navigation programs

Which benefits has your organization experienced as a direct result of its patient navigation programs?

Percentage
of Respondents

Benefit	Percentage
Improved quality outcomes	67%
Improved patient engagement	67%
Improved patient adherence to care plans	65%
Improved patient retention	54%
Reduced unnecessary utilization—ED visits	49%
Reduced unnecessary utilization—readmissions	49%
Improved patient acquisition	35%
Reduced cost of care	33%
Reduced unnecessary utilization—length of stay	32%
Improved health system or hospital revenue	32%
Improved administrative efficiencies for nurses and physicians	32%

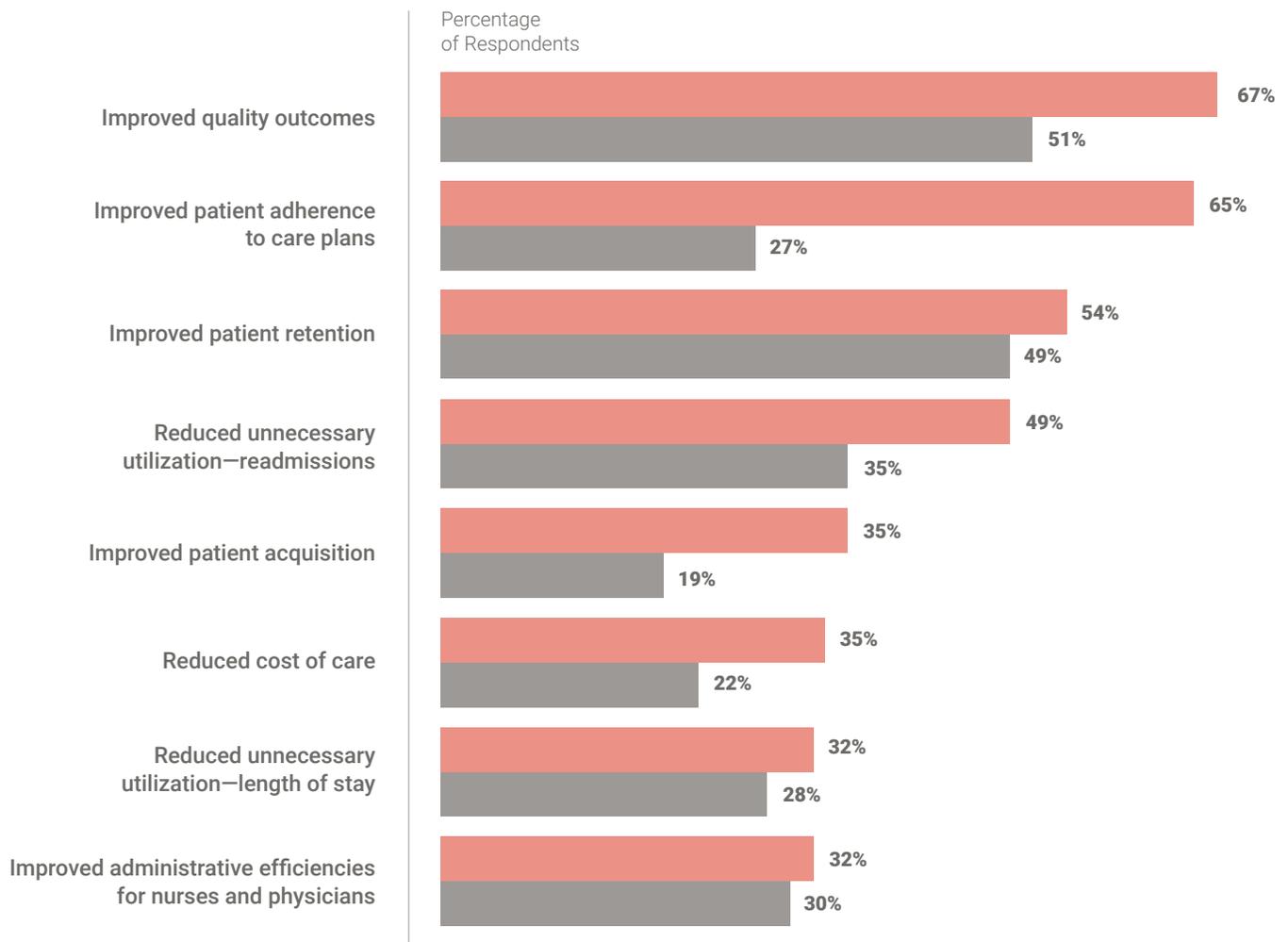**NAVIGATION PROGRAMS MEET KEY EXPERIENCE IMPROVEMENT OBJECTIVES**

These findings underscore the value of patient navigation programs in supporting healthcare organizations' overall goal of improving the consumer experience in 2019. As noted, over half of respondents said this is a top strategic priority. These respondents also said the key objectives they hope to accomplish by prioritizing the consumer experience include **improving clinical outcomes, improving patient engagement, improving patient retention, and increasing market share.**

The findings reflect other industry research related to the benefits of navigation programs. A National Cancer Institute study found that navigation sped up rates of treatment initiation.[3] Another study, by the University of Alabama at Birmingham Comprehensive Cancer Center, found that navigation saved $19 million annually across the network and had an estimated ROI of 1:10.[4]

The survey findings also indicate that **implementing navigation programs leads to more positive outcomes** than the other experience-improvement initiatives organizations are exploring (adding a chief experience officer, providing additional training, and leveraging additional technology).

Navigation benefits compared to other initiatives
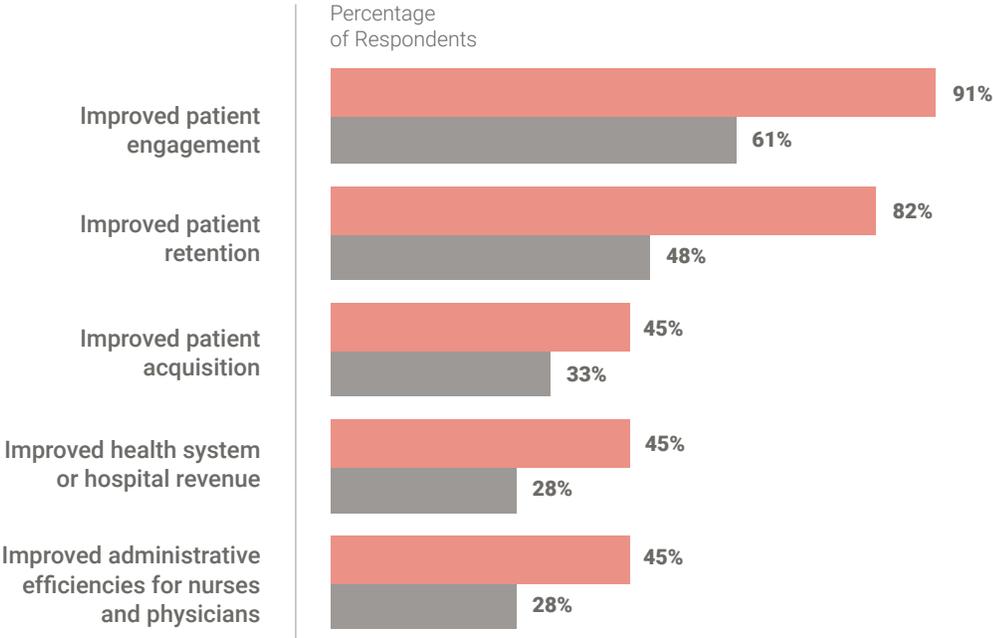
- ■ Navigation programs
- ■ Other initiatives

Percentage of Respondents

	Navigation programs	Other initiatives
Improved quality outcomes	67%	51%
Improved patient adherence to care plans	65%	27%
Improved patient retention	54%	49%
Reduced unnecessary utilization—readmissions	49%	35%
Improved patient acquisition	35%	19%
Reduced cost of care	35%	22%
Reduced unnecessary utilization—length of stay	32%	28%
Improved administrative efficiencies for nurses and physicians	32%	30%

High-value navigation programs use nonclinical navigators, invest in scalability and technology

Eighty-one percent of respondents said most of their patient navigators have clinical backgrounds, but the survey findings indicate **nonclinical navigators** can be more effective in many areas.
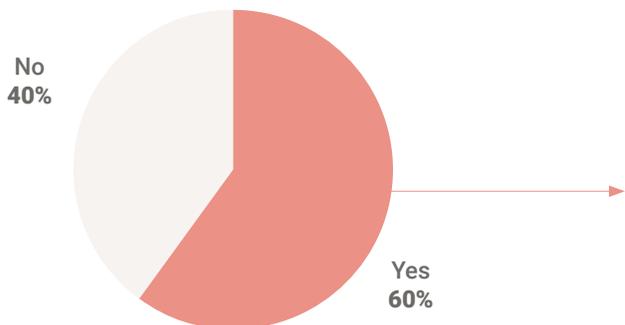
■ Nonclinical navigators
■ Clinical navigators

Percentage
of Respondents

	Nonclinical	Clinical
Improved patient engagement	91%	61%
Improved patient retention	82%	48%
Improved patient acquisition	45%	33%
Improved health system or hospital revenue	45%	28%
Improved administrative efficiencies for nurses and physicians	45%	28%

Survey respondents who noted that their patient navigation program could be implemented systemwide reported higher benefits than respondents who said their program could not be implemented systemwide.
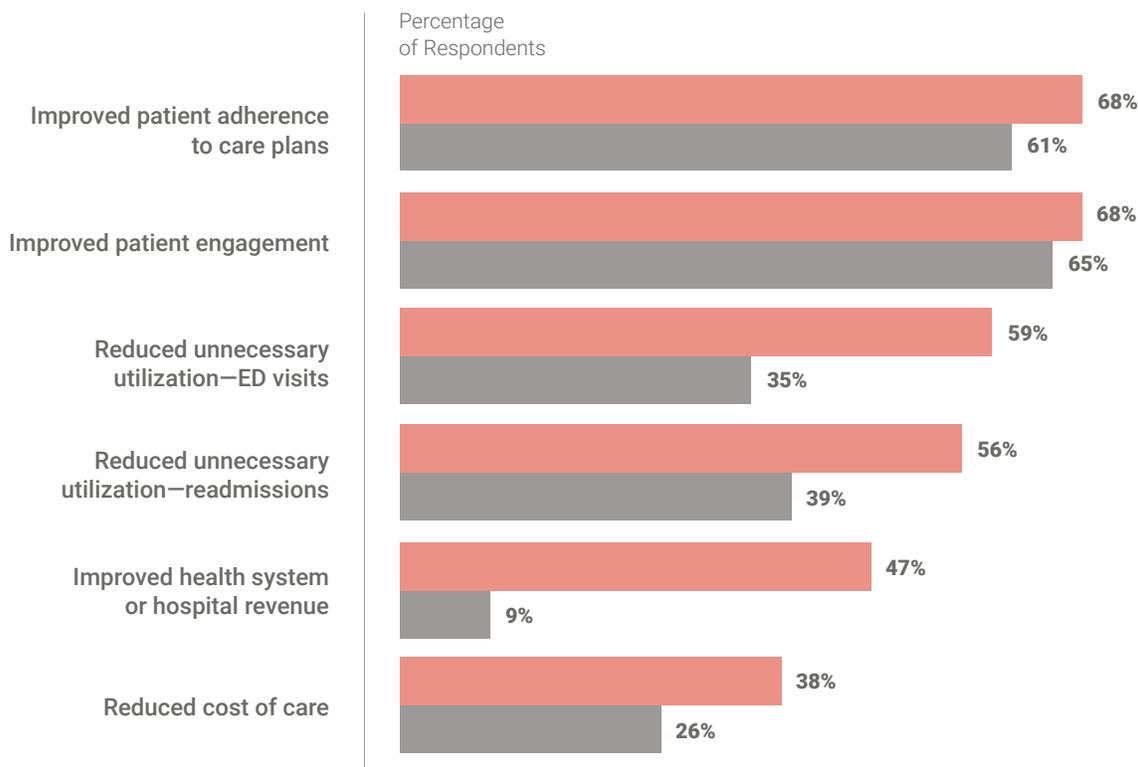
Is your patient navigation solution scalable?

No
40%

Yes
60%

Survey respondents who said their program is scalable also reported more use of nonclinical staff than other respondents.

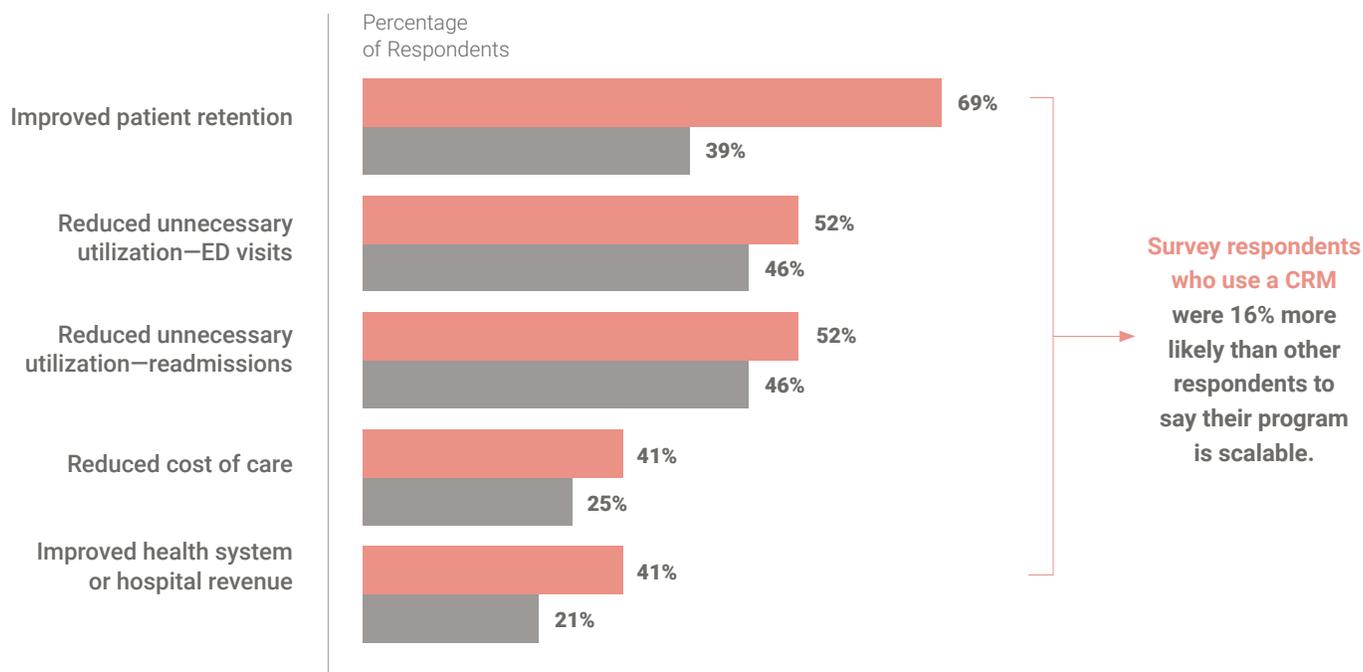**Navigation program outcomes: Scalable vs. not scalable**

■ Scalable
■ Not scalable

Percentage
of Respondents

Improved patient adherence
to care plans
68%
61%

Improved patient engagement
68%
65%

Reduced unnecessary
utilization—ED visits
59%
35%

Reduced unnecessary
utilization—readmissions
56%
39%

Improved health system
or hospital revenue
47%
9%

Reduced cost of care
38%
26%

Survey respondents who said they have a patient navigation program, and also use a CRM (about 50 percent of those with navigation programs), reported more positive outcomes related to the cost-benefits of navigation programs.

■ Program with CRM
■ Program without CRM

Percentage of Respondents

Category	Program with CRM	Program without CRM
Improved patient retention	69%	39%
Reduced unnecessary utilization—ED visits	52%	46%
Reduced unnecessary utilization—readmissions	52%	46%
Reduced cost of care	41%	25%
Improved health system or hospital revenue	41%	21%

Survey respondents who use a CRM were 16% more likely than other respondents to say their program is scalable.

The most effective CRMs are integrated with EHRs, trigger automated patient communication reminders for navigators and staff, and provide actionable insights in workflow tools that optimize the experience for each healthcare consumer.

Patient navigation 2.0: Key takeaways
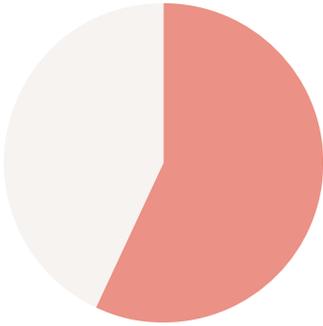
57%

The percentage of healthcare organizations that have navigation programs today, according to the survey.

Programs tend to be focused on specific service lines and narrow patient populations (e.g. high needs patients).

Navigation programs generate value. About two-thirds of respondents from organizations with navigation programs reported improved quality outcomes, patient engagement, and adherence to care plans. More than half reported improved patient retention.

Respondents from organizations that use nonclinical navigator staffing models and that invest in technology, such as CRM systems, reported even higher benefits of patient navigation programs.

Technology can help organizations scale patient navigation programs in cost-effective ways, however, technology adoption is relatively low. Sixty five percent of health systems lack CRM systems, and 61 percent aren't texting patients directly, according to the survey.
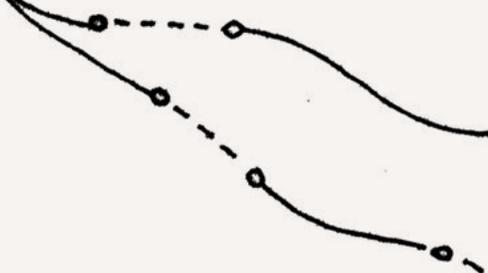
As more organizations begin implementing patient navigation programs, the benefits will become even more clear. Docent Health, a patient navigation solutions provider, can help healthcare organizations implement effective programs and achieve critical milestones in patient experience—leading to quality improvements, cost reductions, and growth.

For more information, contact Docent Health at info@docenthealth.com, follow them @docenthealth, and visit them at docenthealth.com.

REFERENCES
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Docent Health turns healthcare into human care. Our unwavering commitment to consumer-centric design means our technology-enabled service powers unparalleled levels of care. This mission helps drive deeper connections and lasting loyalty. We believe in creating meaningful interactions that enable every patient to feel known, valued, and heard.

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