LITERATURE REVIEW

2.1. Customer Relationship Management (CRM)
A lot of definitions of Customer Relationship Management (CRM) exist in the literature. Only definitions which are relevant to area of research are included in this chapter.

CRM is not just a technology, but rather a comprehensive approach to an organization’s philosophy in dealing with its customer. This includes policies and processes, front office customer service, employee training, marketing, information system.

CRM strategy must consider the situation of the company, needs of its customer and also the expectation its customers.

Gartner (2009) defined CRM as a broad term which is principally used for customer services such as marketing and sales activities. Using IT CRM is used to implement strategy for managing interactions with customers. CRM is used to put in order, computerize, and synchronize business processes. The principle goals of CRM are to find potential customers, attract, and win these customers, nurture and retain existing customers, attract former customers back into the fold, this reduces the costs of marketing and customer service.

Greenberg et al (2009) stated that CRM is a philosophy and a business strategy supported by a system and a technology designed to improve human interactions in a business environment. It uses an operational and transactional approach for focusing around the customer facing departments, sales, marketing and customer service. Furthermore, the early CRM initiatives was the process for modification, culture change, technology and automation through use of data to support the management of customers so it can meet a business value of corporate objectives such as increase in revenue, higher margins, increase in duration of selling time, campaign effectiveness, reduction in call waiting time, etc.

CRM strategy must be aligned to the organization’s mission and objectives in order to bring about a sustained performance of business objectives and effective customer relationships. The organization must adopt customer’s perspective and work on developing a comprehensive planning write up and specific business objectives. The strategies should be laid down in such a way so that they provide benefits to the company and customers, shorter cycle times, greater customer involvement in service development and reduce operation costs by redesigning business process that eliminates work which does not add value to customers [67].

Wan et. al. (2010) examined healthcare providers in adopting CRM as a strategy in building trust to their patients as well as helping patients to avoid feel alienated in the healthcare environment and at the same time improving the service quality and efficiency of healthcare.

With the Web technology, CRM also affords healthcare providers the ability to extend services beyond its traditional practices, and it provides a competitive advantage environment for a healthcare provider to achieve a complex patient care goal. CRM enables a healthcare provider to capture essential patient (customer) information to be utilized effectively, especially in integrating the patients’ information in a system to promote superb service.
Many studies also have reported that many organizations have failed to adopt CRM as a strategy. The main reasons for high rate of failure when implementing CRM are:

1) related to people’s behaviour and culture Cheng et. al. (2008), and
2) CRM is viewed as a merely technology, not as a long-term strategy Payne et. al. (2005).

These notable failures encourage further studies on the implementation issue especially in dealing with change of management. Organizational change is always expected in CRM initiative Greenberg (2002). Hence, there is a possible area to explore further CRM initiative that focuses on people, technology and culture. There is also research examining the development of CRM within healthcare environment.

There are many challenges in adopting CRM for healthcare organizations. Due to the complexity of the business nature in healthcare, there are many issues dealing with patients that must be considered. A healthcare is undergoing a paradigm shift, from ‘Industrial Age Medicine to Information Age Healthcare’ Vimani (2007). This ‘paradigm shift’ is reshaping health systems. It is also transforming the healthcare-patient relationship Ball et.al. (2001).

For example, World Wide Web has changed the way the public engages with health information Powell et.al. (2003). According to Pew Internet and American Life Project, large shares of Internet users say that they will first use Internet when they need Information about healthcare Porter (1995). People are beginning to use Internet resources for research on the health information and services that they are interested in using.

Kunders (2009) studied about the Internet in becoming a crucial medium in supporting CRM. Indeed, the Web technology is a powerful channel available for organizations to utilize to enhance interactions and strengthen relationship with customers.

According Kunders (2009) CRM is an umbrella concept that places the customer at the centre of an organization. Serving the customers is an important aspect of CRM however; CRM is also concerned with coordinating customer relation across all business processes, points of contacts with customers.

A sale principle according to Croteau et.al. (2001), is retaining customer loyalty. CRM is actually a tremendous step forward in creating a system that can provide a means for retaining individual loyalty in a world of many souls. In order to understand CRM, one must also understand the changing nature of the customer because customers are not what they used to be Greenberg et. al. (2001).

Dyche (2001) defined CRM as an infrastructure that allows an increase in customer value, and the correct means by which to motivate valuable customers to remain loyal.

According to Brown (2000), CRM is neither a concept nor a project. Instead, a business strategy, which aims to understand, anticipates and manages the needs of the organizational current and potential customer.
CRM is the methods of getting, retaining and increasing profitable customers. For creating customer loyalty it needs to concentrate on the various service attributes that are directly represent value to them. According to Handen (2000), CRM consists of five elements: strategy, technology, segmentation, process and organization.

CRM in the point of view of Rogers (2006) is a technology-enabled strategy to convert data driven into business actions in response to, and in anticipation of actual customer behavior.

CRM represents a process to measure and allocate organizational resources to activity that has the greatest returns and impact on profitable customer relationship. CRM is also considered by Benz et.al. (2004) as an enterprise-wide business strategy design to optimize profitability revenue and customer satisfaction by organizing the enterprise around customer segment, fostering customer satisfying behaviour and linking processes from customers through suppliers.

Key CRM technology investment provides better customer understanding, increases customer access, more effective customer interaction and integration throughout customer channel and back-office enterprise function. The application domain of CRM includes technology enabled-selling, customer service and support, technology enabled marketing. According to Gefen et. al.(2002), CRM can be divided into three different types: operational, analytical and collaborative.

Operational CRM is also known as front office CRM, enables and communication and involves the areas where direct customer contact occurs for example, call centre or email promotion Tiwana (2001). Operational CRM attempts to provide seamless integration of back-office transactions with customer interfaces. The majority of self-described CRM products on market today fall into the operational category Adebango (2003).

Analytical CRM, also known as back-office or strategic CRM, involves understanding the customer activities that occurred in the front office and enables an organization to analyze customer relationships through data running Gefen et.al. (2002).

Using tecnology analytical CRM compile and process the mountains of customer data to facilitate analysis and new business process to refine customer-facing practices in order to increase loyalty and profitability Adebango (2003).

CRM is almost an overlay Greenberg et.al. (2001). It is not only the communication centre but also the coordination network that provides the unbiased links to the customer and supplier Schubert et.al. (2002). It could be either a portal, or a partner relationship management application, or a point of contacts with the customer.

According to Fayerman (2002), it could also mean communication channels such as the web or email voice applications or snail email. He further states that it also could mean channel strategies. In other words, according to Schubert et.al.(2002), any CRM function provides point of interaction between the customer and the channel itself.
According to Greenberg et.al. (2002), the goal with CRM is to recognize and treat each customer as an individual using the three types of CRM; operational CRM, analytical CRM, and collaborative CRM as already described above.

At the end of this part on the explanation of CRM with Gartner (2010) who gives a rather comprehensive definition stating that keeping sales prospects in mind CRM is recognized and implemented in order to manage company’s interactions with customers CR uses information technology for organizing, automating, and synchronizing business, sales, marketing, customer service and technical support. Goals of CRM are to find potential customers, nurture and retain existing customers, lure former customers back into the fold, and reduce the marketing cost as well as cost of client service. CRM means a company-wide business strategy embracing all client-facing departments and even beyond.

Technology, people, and processes should work together to make implementation effective which increases profitability, and reduces operational costs.

2.1.1 Phases of CRM
According to Gartner (2010), the three phases in which CRM helps to support the relationship between a business and its customers are, to:

- **Acquire**: CRM is used to acquire new customers through excellent contact management, direct marketing, selling and fulfillment.

- **Enhance**: eCRM is combined with customer service tools to offer customers excellent service using a team of trained and skilled sales and service specialists, which offers customers the convenience of one-stop shopping.

- **Retain**: CRM software helps an organization to identify its loyal customers for rewarding them. It further helps in taking relationship marketing initiatives.

2.1.2 CRM Systems Implementation and related Issues
CRM increases the revenue, patient satisfaction, and at the same time significantly cut the operating costs of a hospital. Experts emphasize that technology should be implemented only in the context of careful strategic and operational planning.

Implementations almost invariably fall short when one or more facets of this prescription are ignored:

- **Poor planning**: Initiatives can easily fail when there are no efforts to find a rationale, context, and support for the workforce by selecting and deploying software. In other instances, enterprises simply automate flawed client-facing processes rather than redesign them according to best practices.

- **Poor integration**: For many organizations, integrations are fractional initiatives that address an obvious need: improving a particular client-facing process or two or automating a favored sales or client support channel. Such “point solutions” offer little or no integration or alignment with a
company’s overall strategy. They offer an incomplete client view which leads to unsatisfied customers.

- Toward a solution: Experts advise organizations to recognize the immense value of integrating their client site operations. In this view, organization-centric views should be ignored in favor of re-orientating processes toward information sharing across marketing, sales, and service Gartner (2010).

2.1.3 Adoption Issues
Historically, the landscape is littered with instances of low adoption rates. A report by Gartner (2010) estimated that more than $1 billion had been spent on software that was not being used. More recent research indicates that this problem takes a long time to solve.

According to Central Service Organization (CSO) Insights (2010), less than 40 percent of 1,275 participating companies had end-user adoption rates above 90 percent.

In a Healthcare Information and Management System Society (HIMSS) (2010) survey from the U.K., around 80% of senior executives reported that their staff are reluctant to use the systems installed by them.

Further, more than 40 percent of respondents said they use only 50 percentage functions of existing system; 72 percent indicated they would trade functionality for ease of use; 51 percent cited data synchronization as a major issue; and 67 percent said that finding time to evaluate systems was a major problem.

It is expected that by 2014 expenditures in CRM may cross $100 billions. As organization are expending very huge amount on CRM, they should devise strategy to overcome consistent reluctance of the employees in adopting it. Organization must use specialist for boosting employee to adopt it and ask them to use CRM tools in their daily workflow.

- Choose a system that is easy to use: not all solutions are created equal. Vendors should offer user-friendly and simple applications. Simplicity will attract the users to use the system.

- Choose the right capabilities: Employees need to know that time invested in learning and usage will be rewarding. Otherwise they will ignore the system.

- Provide training: Changing the way people work is a big task. Even today training or assistance is required.

- Lead by example: First top management should start using a new application. This will definitely increase adoption rate.

2.1.4 Privacy and Data Security System
One of the primary functions of these tools is to collect information about patients, thus a hospital must consider about data security and privacy, at the same time give consideration to legislative and cultural norms. Some clients prefer assurances that their data will not be shared

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with third parties without their prior consent and that safeguards are in place to prevent illegal access by third parties.

2.2 Application of Customer Relationship Management in Health Care

According to Alshawi (2005), Health care sectors of many nations are now opting for CRM for building a bridge of trust between hospital and customer. The healthcare providers use CRM system for getting necessary information about the patients and use it as efficiently as possible.

CRM orchestrates various methodologies in a structured manner to delivering healthcare. It is the complex information management system, CRM system cannot be set up overnight. It needs a daily accumulation of data from both in-patient and outpatient departments terminals via multimedia platform and integration with other ancillary technical systems Wan (2010).

In today's world, the medical sector is finding the need to know more and more about its existing and prospective patients. The efficient hospital services can retain their patients. To respond efficiently about the patient’s current and future need, hospitals should be more familiar with the patient Gartner (2010).

The Health Care sector is now opting for CRM in its daily routine work. CRM Health Care consists of a series of software products that help healthcare organizations to maintain excellent relationships with their clients. CRM thus helps the health care sector in improving health of the patient, increasing their loyalty, retaining them and also adding new services for patients.

CRM Health Care Services include:
- Strategic Planning
- Communication Services
- Consulting Services
- CRM for Physicians
- Campaign Management
- Database Construction
- Predictive Segmentation
- Communications Strategies

2.2.1 CRM Aids Customer Service

CRM provides the organization with the chance to acquire and retain customer relationships. It analyzes every patient interaction and tries to convert it into a health management opportunity. Its diverse functionality enables employers, customers and employees to access common information. Almost every patient is being contacted daily either through e-mail or on phone or via one to one interactions.

All these increase the need for an affective and well-coordinated customer approach. CRM Healthcare supports the call centre by providing customer service representatives with necessary information about patients. This helps the health care sector to access vital information and deliver value to patients.
CRM solutions succeed in transforming healthcare organizations into customer-centric efficient providers of health care. The healthcare industry has realized the importance of quality of service. CRM industry leaders now offer CRM solutions to help healthcare organizations deal with customer service issues while delivering excellent health services.

In addition, CRM helps Healthcare organizations plan and carry out sales and medical management campaigns. Healthcare CRM software increases the efficiency of call centers. It also helps the initiatives of hospital and facilitates the collection of information regarding specialists and supplementary medical providers. Apart from this, it maintains secure and comprehensive information regarding physician profiles that can be used by both the sales and marketing department, Dolan (2010).

2.2.2 CRM Aids in Overall Profitability
Most CRM industry leaders possess the latest IT technology along with excellent healthcare market industry knowledge and thus succeed in enabling the reduction of medical errors. The element of cost has also to be taken into consideration and healthcare organizations have realized that they need to make the patient the focal point of their venture. CRM helps the hospital to trim down operating expenses, cuts the risk of errors, and facilitates better relationships with patients. While improving in general effectiveness, it assists in supplying medical professionals and their patients with a means by which they can communicate effectively. It also maintains a complete database of health care providers, thus enabling health care organizations to efficiently manage their relationships with them.

2.2.3 Health Industry Using Enterprise Health Relationship (EHR) Data to Target Patients in Marketing
Dolan (2010) reports that the healthcare industry is increasingly using customer relationship management systems to send to doctors and patients information they may be interested in based on their medical history and electronic health records. CRM software has largely been used to generate targeted e-mail campaigns personalized Internet content or phone banks that can be used to track information on physicians.

However, the technology is increasingly being used to track patients because Enterprise Health Relationships (EHRs) provide a significant amount of data on patients. EHR can be able to operate together with CRM software, which increases the quantity of data available and the accessibility of that data. Current health policies allow for the use of patient data for marketing purposes but require such use to maintain standards on patient trust. For example, some healthcare providers allow patients to decide whether they want to receive customized information so that they know precisely what they will get, Dolan (2010).

2.2.4 Patient Relationship Management (PRM)
According to Russell et.al. (2009) PRM means the principles of Customer Relationship Management (CRM) to the world of healthcare. Patient Relationship Management (PRM) is a commitment to understanding patients as individuals and then communicating relevant information to them and their caregivers using the medium they prefer. PRM is not a technology
but rather a vision realized through technology; technology grants the ability to achieve more cohesion between the disparate parts of the healthcare system, which in turn improves both clinical outcomes and patient satisfaction.

According to Dolan (2010), PRM applications can:

- Timely diagnosis prevents additional illness. With a complete view of the patient, doctors can more easily identify relationships between current symptoms and future health concerns.

- Improve the quality and consistency of care. To check whether critical safety measures are followed or not automated processes can be generated, and that the organization is in compliance with privacy and other regulatory policies.

- Speed routine processes, such as admissions, referrals, and discharges. By analyzing the performance of routine processes over time, improvements can be made that eliminate unnecessary steps and increase patient satisfaction.

- Eliminate time wasted accessing information. By digitally storing documents, such as treatment plans, symptom-and-diagnoses relationships, and reference articles, less time is spent searching for information needed to deliver quality care.

- Automate proactive communications. By viewing patient data sorted by certain characteristics, targeted proactive communications can easily be sent. For example, mailings to diabetic patients can inform them about new research in the field, less painful treatments options, or upcoming seminars or workshops.

- Reduce the number of missed appointments. Tasks can easily be set up to streamline appointment reminder calls. Automated processes can be put in place for follow-up and rescheduling should appointments be missed.

By providing a centralized view of patient demographic information, standardizing and streamlining processes, and enabling proactive communications, a PRM system can help physicians improve their patients’ overall health. Additionally, patients will be more satisfied with the service they receive, which increases the likelihood they will make regular, preventative healthcare an ongoing priority.

2.2.5. Key Aspects of Patient Relationship Management (PRM)

PRM orchestrates a number of methodologies in a synchronized approach to delivering healthcare. Experts caution against rapid implementation and advocate instead a deliberate sequencing of these strategies in order to achieve desired results.

2.2.5.1 Enterprise Identity Management and Data Integration (EIM)
A crucial first step is the establishment of a system for accurately identifying ‘customers’ (patients, clinicians, etc). As Schumacher (2006) underscores, "some patients is not identified by his hospital system when he arrives for care.” He says that integration of enterprise-wide data is crucial to improving customer service. EIM provides the integration needed to bridge operational systems (such as electronic patient records) and thus supports data integrity across the organization.

This in turn enables the development of "a mission-critical data warehouse of the most valuable asset i.e. patient data." Without a rigorous level of data integration, standardization, protection from error, and traceability, Patient Relationship Management (PRM) solutions will be stymied. An integrated single database enables healthcare organizations to perform what Paddison (2006) describes as the " Patient Relationship Management (PRM) closed-loop cycle": Collect aggregate data – Analyze individual needs and preferences – Develop relevant messages based on individual needs and preferences – Deliver communications through preferred channels (direct mail, e-mail, phone, and fax) – Analyze results and refine the approach.

2.2.5.2 Outcomes Management and Predictive Modeling:
Outcomes analysis combined with predictive modeling offer a powerful means to deliver disease management. Healthcare organizations can, by: a) predicting who is at-risk for developing certain conditions, and b) identifying of those already diagnosed who is likely to develop complications, provide preventive interventions instead of more expensive treatments that may otherwise be required for acute episodes.

In this manner, according to Plocher et.al.(2009), "outcomes for an entire population can be handled and improved." This layered system serves as the platform for building a successful PRM strategy, the survival of which depends on strong change management and communication plans to ensure alignment between business needs and organizational models in support of strategic objectives Phillips et.al. (2009).

2.3 Benefits of Patient Relationship Management (PRM) in the Health Care Industry
According to Vimani (2007). Patient PRM applications can back office processes, such as admission of patient, discharge of the patient and so on by analyzing the performance of routine processes over time. Improvements can be made to eliminate unnecessary steps and increase patient satisfaction.

Furthermore, it can help prevent additional illness by physicians taking thorough examination of the patients all times to enable them easily identify relationships between current symptoms and future health concerns.

Moreover, PRM application can eliminate time wasted accessing information by electronically storing indexed documents, such as treatment plans, symptom-and diagnoses relationships, and reference articles, less time is spent searching for information needed to deliver quality care.

The PRM can automate proactive communications by viewing patient data sorted by certain characteristics, targeted proactive communications that can easily be sent. For example, through emails diabetic patients can be informed about new medical research, treatment options.
PRM can also contribute to improve the quality and consistency of care by creating automated processes to ensure critical safety procedures are followed, and that the hospital complies with privacy and other regulatory policies.

Finally yet importantly is that PRM will reduce the number of missed appointments. Tasks can easily be set up to streamline appointment reminder calls. By putting automated processes in place for follow-up and rescheduling should appointments be missed, Vimani Sumit, (2007).

2.4. PRM versus CRM in Private and Public Health Care

Given the commercial marketing roots of CRM, it is important to distinguish the applicability of CRM principles to PRM in both private and public health care sectors. In brief, while CRM and PRM involve similar approaches the goal of CRM is ultimately to increase consumer spending. Conversely, PRM strives to give patients the information they need to make better healthcare choices, which will eventually save them and the system money. Patient Relationship Management (PRM) also requires added consideration for handling complex data and the need to enforce airtight security and the appropriate use of patient data, Russell et al. (2009).

Despite the differences, commonalities between CRM and PRM enable stronger relationships that benefit from: greater anticipation of customer needs and wants, improved communication channels, timely and credible information, and the capture of tacit knowledge in essence knowing people better without wasting their time.

However, the marketing tactics of commercial persuasion and manufactured demand do not directly apply in healthcare; therefore, the best ‘marketing’ goal that a private for-profit healthcare organization can hope for in "the migration of CRM to PRM is the natural evolution of building the perception. When the need arises, the promoted physician practice or hospital is there to help you", Wilson-Steele (2009).

Nevertheless, ‘perception management’ also applies to public PRM in efforts to nurture relationships with a patient/provider audience receptive to preventive, cost-saving interventions that stave off the need for expensive acute care services. Responsibility for the public purse creates an impetus for seeking these efficiencies through this form of Citizen Relationship Management—the CRM equivalent in the public realm.

Driven by pressures to decrease costs, PRM in public health systems works to prevent "customer disconnects" and maintain a "360-degree view of the customer" (Phillips 2002), including functions like enhanced referral tracking and automatic reminders aimed at reducing missed appointments.

According to Halpern et al. (2006), in the National Health Service (NHS), the cost of "did not attends" (around 1/8th of outpatient appointments in 2000) "is a source of increasing concern" and "impacts seriously on the health service’s ability to plan and deliver timely care", Wanless (2010). This example illustrates how PRM applies practically in the public arena and could assist healthcare organizations to meet regulatory imperatives such as the UK’s Gershon (2005).
Review requiring local authorities to achieve 2.5% efficiency savings each year, believed to be possible in large part through IT supported, streamlined processes.

2.5 Implementation of CRM in Health Care

According to Handen (2000), CRM system needs a daily accumulation of data from both in-patient and outpatient departments’ terminals through multi-media platform and integration with other ancillary technical systems enable an effective CRM system to be completed after the following work is done well.

2.5.1 Integration of CRM system with Hospital Information System (HIS)

CRM system is the extension and complementation of HIS. Since medical data provides the basis to CRM in hospitals, CRM undoubtedly takes HIS as the main data source and has to assure the stability of HIS. The data in HIS database can be used at any time for data analysis and data mining. Based on the analysis of HIS data, CRM may find the management scheme and marketing model that fit the hospital best.

Meanwhile, CRM may help to locate the key client groups and their special demand on service, as well as the general demands from common patients. Integrated with HIS, provides more comprehensive medical service, higher service quality and optimized configuration of medical resources, Murray (2000)

2.5.2 Integration of CRM with Hospital Web Platform

Patients usually have to visit hospital when they need specialized clinical services, which requires a reservation ahead of time or a couple of days for laboratory outcome. Murray (2000) states that integrating with hospital web platform, CRM may reduce the frequency of patients’ visit to hospital by setting up an online reservation and also check up program to streamline the clinical process.

2.5.3 Integration of CRM with Call Centers

The regulatory environment for hospitals heightens the importance of appropriate corrective and preventive actions. Many hospitals use their CRM systems in the call center to handle the demand tracking process to ensure compliance. Traditional call service in hospitals only provides static information about clinical departments, doctors, medical fees, etc., based on which, no consultations can be made in accordance with the condition of patients then and there. It always requires a long time for patients explaining the symptoms of their own to get accurate information from hospitals. Integrating with call center, CRM can make operators aware of the information of patients including their identity, medical records, etc. when they make a phone call, so that it makes possible that operators can give an accurate and timely reply to patients and help them make a reservation with relevant doctors and specialists. When problems of patients are solved effectively and timely in the CRM model, a higher satisfaction about medical service will be achieved Larry (2001).

2.5.4 Integration of CRM with short-message gateway

As an effective auxiliary of network communication, short-message gateway plays a significant role in information passage of CRM in hospitals. It is preferable to dispose bidirectional short-
message gateway, through which reply messages from patients may be received. In practice, services such as message reminding, reservation confirmation and patient caring may be offered by sending messages.

2.5.5 Establishment of Customer Responding Mechanism and Database

Processing patients’ complaints is an important part of hospital routines, Murray (2000) state that the mechanism integrating CRM platform with internet, telephone and mail system provides a multi-channel complaints management platform, where the advices and complaints are kept in record and timely response is made to enhance the satisfaction of patients and thus promote the standardization of hospital management.

Arlen Duncan global director of IT for Diagnostic Ultrasound says the hospital’s CRM system plays an integral role in tracking patients’ complaints and providing data to the hospital’s quality system. The users mentioned items are used by the quality assurance department for review is nothing but part of the hospital’s root cause analysis Monteiro (2003).

According to Gartner (2009), most CRM packages are capable of handling complaints from patients.

According to Paul E. et al(2009), PRM application can do the following:
Firstly, analyze the performance of routine processes over time (such as admissions, discharges, transfers, and referrals), improvements can be made to eliminate unnecessary steps and increase patient satisfaction.

Secondly, if patients have a better understanding of how they themselves ensure good health, they can opt for better choices concerning their health and their lifestyle. This have a significant impact on the health system.

Thirdly, the customized workflows can be developed to automate care coordination activities between provider institution (Hospital, Clinic, Home Health), which can help improve patient outcomes while increasing operational efficiency and reducing costs.

Fourthly, clinicians can flag patients with specific chronic illnesses and automate targeted proactive communications to inform them of upcoming educational offerings.