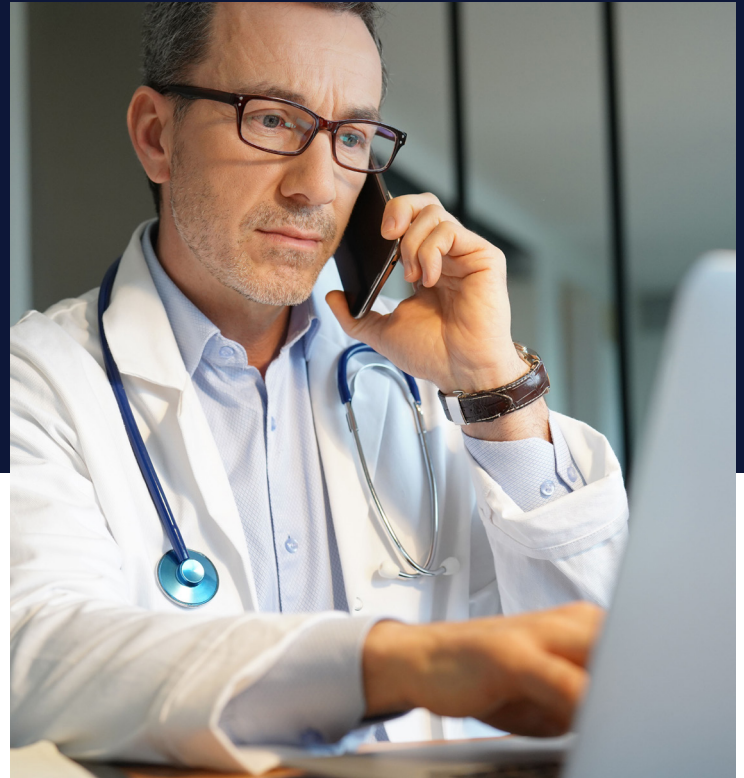


Quick guide to automated patient outreach



As a healthcare provider, you want to engage your patients to ensure continuity of care as well as a positive patient experience. However, you also need to do this in the most cost-effective way possible. That's where automated patient outreach comes in—it allows you to send text messages and IVR calls to patients at scale.

Yet, automated patient outreach also has its drawbacks. Recent research reveals that patients don't want too many automated messages from their providers. In this guide, we'll explain how to put an automated patient outreach strategy in place that's successful and cost-effective.

STEP 1: UNDERSTAND THE TOOLS AT YOUR DISPOSAL

When we talk about “automated patient outreach,” what do we mean?

There are two tools at providers' disposal:

- Automated text messages
- Automated IVR calls

IVR stands for [interactive voice response](#). This technology allows people to interact with a phone system through either their voice or their keypad. We're most familiar with IVR when we call an organization and a pre-recorded voice answers. That voice guides callers through a selection of options to reach their goal. However, IVR can also be used for outbound calls; when someone answers the phone, a recording plays.

STEP 2:
LOOK AT THE SITUATION
FROM THE PATIENT'S
PERSPECTIVE

For providers, automated patient outreach is a boon. It allows them to send automated messages to patients to remind them about things like flu shots. Because it's automated, providers don't have to dedicate staff resources to reaching out to patients—that saves them time and money.

Yet, how do patients feel about automated patient outreach? Research says that automated patient outreach actually has [the potential to alienate patients](#).

Patients who received more than ten automated text messages were more likely to opt out of future communications, while patients who received more than 20 automated texts per year were three times more likely to opt out than those receiving only two messages per year. IVR messages showed a similar trend: patients who received more than 10 IVR messages per year were more likely to opt out than those who had only received two messages, while patients who received more than 20 IVR messages annually were the most likely to opt out.

Researchers believe that patients opt out when they're not receiving messages tailored to their needs or situation. For example, if you're not in a risk group to receive a shingles vaccine, you wouldn't want a reminder to go get one. Patients aren't opposed to automated patient outreach, per se, though it has to be relevant.

STEP 3:
PUT AN AUTOMATED PATIENT
OUTREACH STRATEGY IN
PLACE THAT ENGAGES,
RATHER THAN ALIENATES

You shouldn't abandon automated outreach because it has the potential to alienate patients; rather, you should create a strategy that keeps them engaged.

The key to such a strategy is twofold:

- Sending out information only when necessary
- Tailoring information for a patient's needs

What does that look like? We'll illustrate with two examples.

Every medical practice has patients who don't show up for appointments. This costs providers [millions of dollars a year](#). Research has shown that appointment reminders play an important role in preventing no-shows; automated appointment reminders would free up staff resources to focus on vital tasks while boosting appointment attendance.

Here's another example: staff at providers' offices could segment the patient roster by age and use automated patient outreach to send out flu shot reminders to high-risk age groups. Patients who need the shot most will appreciate the prompt.

STEP 4: CHOOSE THE RIGHT TECHNOLOGY PLATFORM

Creating a patient outreach strategy is vital, although it's equally important to choose the right technology platform. What does the right technology platform look like?

A cloud-based unified communications platform is the best tool—here's why:

- It's flexible—providers can send out IVR messages or text messages to patients
- Providers can use it from a mobile device
- Unified communications platforms have other uses than just automated patient outreach—they can be used for [telehealth](#), [forward triage](#), and for [patient access centers](#)

A unified communications platform features telephony, instant messaging, videoconferencing, and file sharing. It's easy for staff and providers to use, so they don't spend lots of valuable time in training when they could be serving patients.

RingCentral's cloud-based unified communications platform enables you to securely communicate with patients. You can configure it to send out automated appointment reminders as well as automated IVR calls. Because it runs in the cloud, users can access it anywhere, and patients can interact with the solution through their mobile devices.

STEP 5: IMPLEMENT YOUR AUTOMATED PATIENT OUTREACH PLAN

Once you've created your automated patient outreach plan and you've put a cloud-based unified communications platform in place, you're ready to put that plan in place.

Here's what you need to do to ensure its success:

- Set a goal for the program—do you want to reduce no-shows? Do you want to increase patient engagement? Do you want to lower your opt-out rate for automated communications? Consider what goals make sense for your organization
- Set benchmarks to measure success—will you be successful when you've lowered the opt-out rate by 5%, for example?
- Segment patients to ensure that only specific groups receive certain communications (for instance, patients who are frequent no-shows should receive automated appointment reminders)
- Decide which communications are relevant for your various patient populations
- Decide when communications are urgent and should be sent out – too many messages irritate patients

STEP 6:
**ANALYZE YOUR
IMPLEMENTATION AT
SET INTERVALS**

How do you know if your plan is working? You have to analyze your success periodically.

Set an interval (perhaps every quarter or every six months) to analyze the success of your plan. Are you meeting benchmarks? Are you seeing steady or increasing rates of patient engagement, and are opt-out rates dropping?

By occasionally analyzing how your plan is going, you can fine-tune it to ensure that you're sending out patient communications that won't be ignored.

RingCentral provides a cloud-based communications platform that facilitates better patient experiences. See how cloud communications are transforming healthcare. [Get the demo.](#)

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