



artera™

Your Guide to Governance:

Best Practices to Effectively Manage Your
Enterprise-Wide Patient Communications Strategy

April 2024

Contents

- 3 Introduction
- 4 How to Use This Guide
- 5 – 15 Five Best Practices & Worksheets

1 Identify and Define the Problem

2 Review the Current State of Patient Communications

3 Establish a Governance Committee

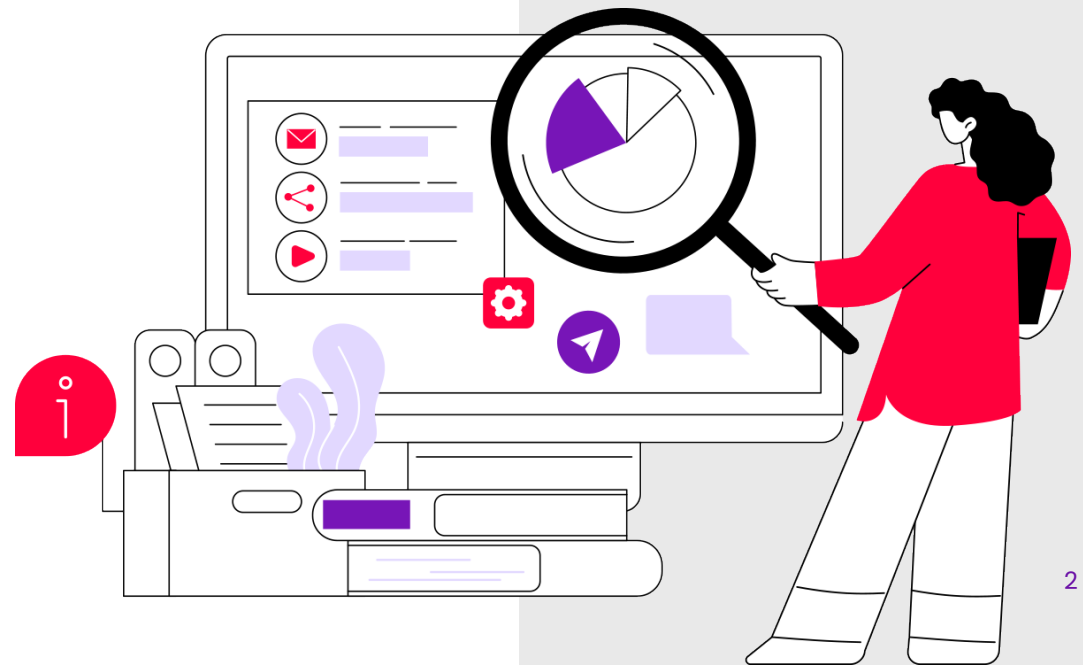
4 Define the Desired Outcomes

5 Measure, Iterate and Improve

- 16 Final Thoughts
- 17 About Artera

This guide includes **five best practices** along with downloadable worksheets to help you build a governance committee for your organization.

Please note that this guide does not constitute legal advice - consult with your legal and compliance teams on any questions and concerns.



Introduction

As healthcare evolves to be more patient-focused, digitally integrated and outcomes-driven, there's a growing need for providers to adopt digital tools to engage patients effectively throughout the care journey.

While the proliferation of tools and decentralized users certainly has its advantages, it also introduces a new challenge: a surge in digital noise where an abundance of technology systems, specialties and providers are all competing for attention from the same patients.

This increasing flood of texts, calls and emails can leave patients feeling “over messaged” and digitally fatigued to the point where they tune out critical information, resulting in poorer response rates and adherence. And while messages may initially resonate with patients, “if you overload [them] with messages, it’ll just get lost,” said Jon Freedman, digital strategist at Chartis.

JAMA Network Open [research](#) also shows that patients who receive multiple text and interactive voice response (IVR) telephone messages from health systems are more likely

to opt out of future messages. Researchers are now urging providers to “use these messages judiciously to minimize message fatigue.”

To do so, governance and orchestration are needed to ensure patients are receiving the most important communication at the right time, in the correct cadence and in their preferred channel. Keep in mind another key consideration: all of this must be done within the context of government regulations and your organization’s rules of compliance.

Many organizations lack a governance structure to rationalize and manage texting communication holistically, meaning they may be at risk for suboptimizing or over-communicating with their patients without even realizing it – and potentially even violating compliance regulations.

When your communication is appropriately governed, you will be more effective in the outcomes you want to achieve. So, where do you begin?

According to Artera research:

- Large health systems have 11+ digital health vendors on average that communicate (e.g., text, IVR, etc.) independently with patients during different stages of their care journey.
- Often, these digital health vendors are managed by different departments within the health system, with limited-to-no awareness of competing communication workflows or messaging backlogs.
- There is limited-to-no coordination of message importance, timing or cadence, resulting in communications appearing out-of-order and lacking context.



How To Use This Guide

In this guide, we break down the “how to” of effectively managing – and optimizing – your patient communications strategy across your entire organization. With suggested prompts to consider and helpful worksheets to complete, you will be one step closer to establishing governance and delivering a greater patient communication strategy at scale. When you reach the end of the guide, our goal is for you to:

- 1. Identify your challenges (or future problems)**
- 2. Document the current state of patient communications**
- 3. Establish an effective governance team with key stakeholders**
- 4. Outline the desired state of patient communications**
- 5. Define measurements and analyze data**



TCPA Compliance

The TCPA contains several different provisions designed to safeguard consumer privacy. There is significant overlap between these regulations and patient satisfaction with your communications. To both avoid committing TCPA violations and penalties and to ensure you do not frustrate your patients, messaging must comply with requirements, such as calling time restrictions (8 AM to 9 PM), Internal Do Not Call (DNC) List, Robocalls, National Do Not Call Registry, Identification Requirements and Automatic Telephone Dialing Systems. Staying within these guardrails is the responsibility of your operational teams as guided by your compliance officer.

We recommend adding the compliance officer to your governance oversight group. Coupling the input from a patient advisory group, your operations team's practical experience and common sense, and the formal regulations will inform your overall messaging plan.

Consider also reviewing our [Compliant Texting whitepaper](#) – an educational resource that outlines the role of the TCPA and HIPAA, as well as best practices to consider.

1





















Identify and Define the Problem

As the saying goes, “You can’t fix what you can’t see.” Before you can dive headfirst into a solution, you must identify the current – or future – problem your organization is facing.

At this point, we may have convinced you to ponder a problem that many of our customers are facing today: an unawareness, or lack of visibility, into their patient communications tools and outreach, leading to an overwhelming amount of messages sent to patients.

These not only reiterate the lack of visibility into an organization’s holistic patient outreach but also emphasize just how challenging it can be to cut through the “noise” to meaningfully engage patients and attain intended outcomes.

Here is just one example of a potential patient’s communications over one work week:

| Monday | Tuesday | Wednesday | Thursday | Friday |
|---|--|---|---|---|
|  Apt Reminder (cardio)  Apt Reminder (primary)  Patient/intake forms (primary) |  Update insurance msg.  Patient reg/intake forms (cardio)  primary apt (new diagnosis: diabetes)  Patient education materials (diabetes mgmt) |  Cardiology Apt day-of msg (parking instruction)  Referral message, request to schedule apt w/ diabetes care team  Patient education for new Rx  Lab results available |  Satisfaction survey (primary)  Billing notification (primary)  Request to call / schedule next visit (primary)  Apt confirmation (diabetes care team)  Video visit instructions for diabetes care team apt. |  Satisfaction survey (cardio)  Billing notification (cardio)  Pop health outreach: reminder to schedule mammogram  Patient reg/intake forms (diabetes care team) |

Here are a few real-life examples of over-messaging we’ve heard from our customers:

- 10+ EHR automations + several 3rd party messages simultaneously delivered via 2 different phone numbers
- One EHR delivered 72 messages within 2 hours for one appointment
- Patient received 47 instant booking automations within 1 minute for appointments scheduled in a primary care practice
- 39 automations sent, in a row, due to specialty booking for appointments scheduled over a few weeks
- 6 duplicate messages – delivered via text, phone and email regarding appointment cancellation and insurance verification in less than 2 hours
- 62 EHR portal validation code messages in less than 4 days



If your organization is anything like the average health system, you may be using a variety of digital health vendors (e.g. telehealth, bill pay, appointment reminders, portal, intake, care gaps) and/or several different staff teams to communicate with your patients. Likely, the result is a range of messages – sent at random – from different parts of your organization and perhaps from different phone numbers, creating a confusing and frustrating patient experience.

According to our [Trends in Patient Communications report](#), which surveyed more than 2,000 patients nationwide, 68% of patients report receiving repetitive messages from their provider via various communication channels and 65% of patients report receiving messages that were sequenced “out of order.”

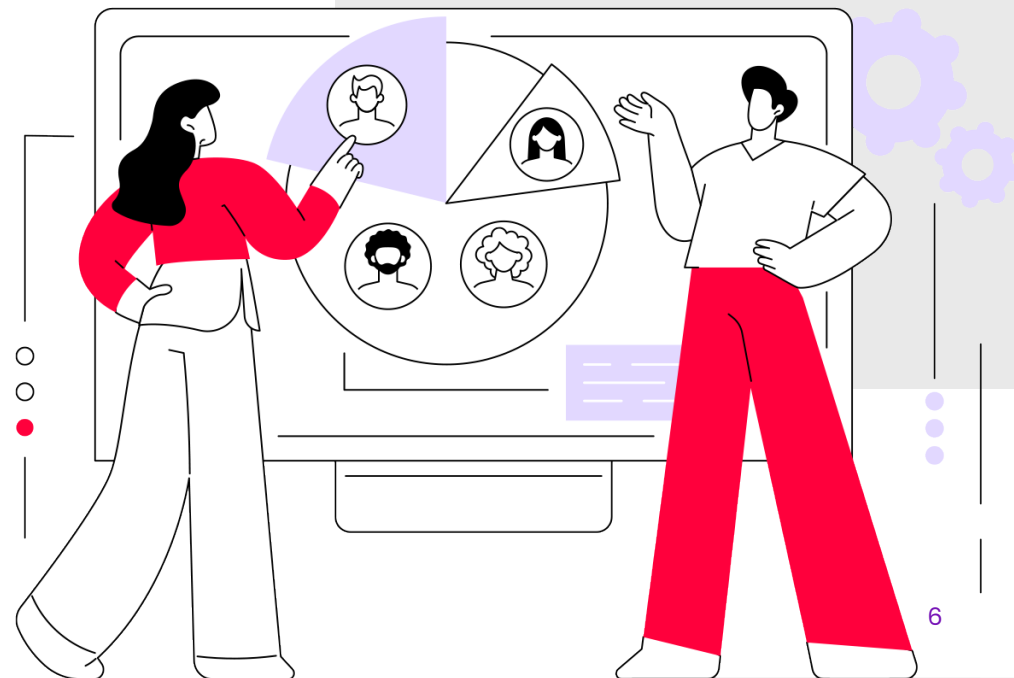
Whether you’ve heard directly from patients about over-communication or you’re proactively preparing for what may come through this digital surge, we’re here to help you effectively govern this moving forward so you can reduce patient frustration, stay compliant and optimize outcomes.

If these descriptions sound like you, there is a risk that you are not getting the intended value from your current tools and processes – move on to the next best practice!

Imagine if a patient complains that they are receiving too many communications. Your CEO comes to you and says figure out all of the communications we had with this patient... ***How would you consolidate this data today?***

We have a huge challenge with the fact that our patients are very confused, they complain about too many messages. We have other third-party systems that message patients. The systems keep branching out and it’s a confusing experience for patients.

Enterprise Healthcare Provider
(Artera customer)



2

Review the Current State of Patient Communications

Now that you've successfully defined the problem, it's time to review and document the current state of patient communications across your entire organization.

First, you'll want to document who is delivering communication to your patients, including when and how often. Gaining visibility into the breadth of communication happening across your organization is a good first step to mapping out your priorities, identifying any overlaps and building a more cohesive communication framework.

To do so, you'll want to perform an environmental scan. This could be done by simply asking your IT team to share a comprehensive list of technologies that are being used by each department. Or you may want to prompt a discussion across your management team to ask if people across various functions could submit a list of their tools and technologies, including how they're using them to communicate with patients.



Today, healthcare providers are expected to digitally engage patients in a more meaningful way and about more than just appointment reminders, including pre-visit preparation, post-visit follow-up care, and prescription refills. This type of digital engagement enables providers to encourage specific behaviors and track tangible outcomes. But as always, more is not always better. Focus on value, not volume.

Meg Aranow

SVP, Platform Evangelist, Artera, and former CIO, Boston Medical Center



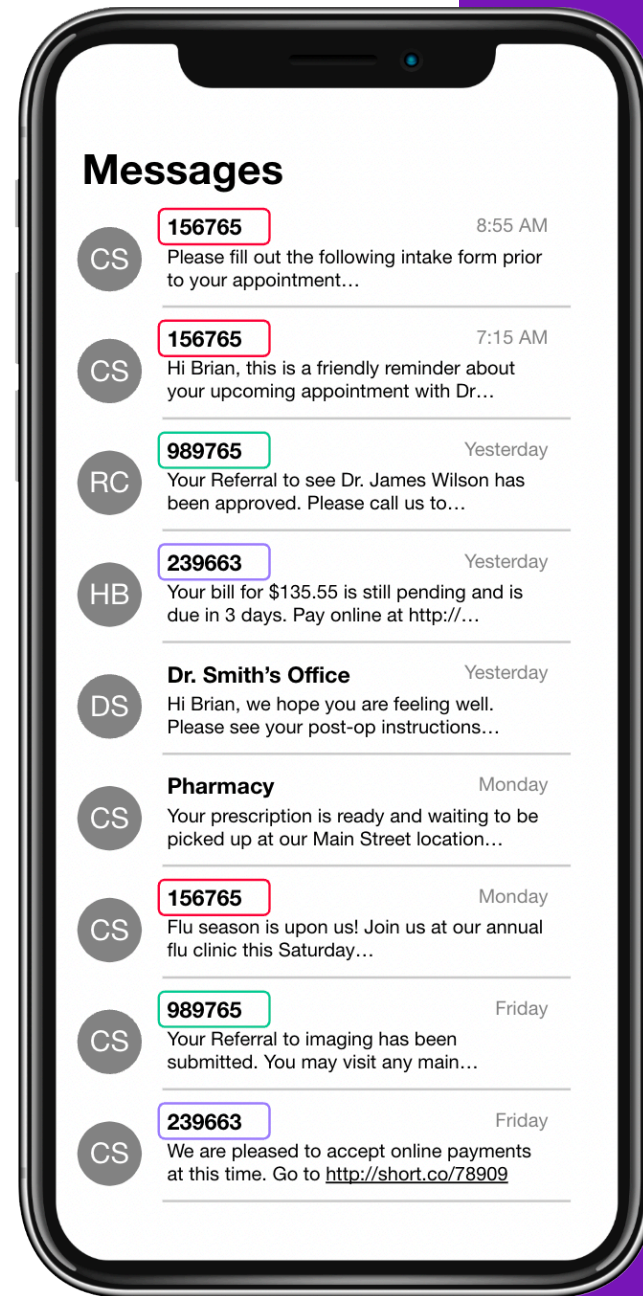
Ultimately, this inventory will help to create a large, holistic inventory of messaging tools and outreach – one that could help with communications oversight. This is where you would list all of your departments that digitally contact patients. A few common examples include:

- Call Center
- Clinics
- Care/Case Management
- Ambulatory Surgery (pre-post op instructions)
- Financial Services

Each department should consider questions, such as:

- What systems and tools are we using to communicate with patients?
- When are we communicating with patients?
- How frequently are we sending messages?
- What types of communication are we using?
- What is our target population?

In the worksheet below, you'll find a proposed framework to build out this inventory. Fill in the information to better understand your current patient outreach and messaging strategy.



Intake Form

Appointment Confirmation

Referral Approval

Billing Reminder

Post-Appointment Follow-up

Rx Reminder

Pop Health Campaign

Referral Approval

Billing Reminder



Map Your Inventory

Use this worksheet to create an inventory of patient engagement technologies communicating with your patients.

| ROLE | | VENDOR | USE CASES | USER DEPARTMENT | MESSAGE FORMS (SMS / CALL / EMAIL / PORTAL) | RATE EFFECTIVENESS OF YOUR MESSAGING 1 = POOR 5 = VERY STRONG |
|----------------------------------|---|--------|-----------|--------------------|---|--|
| Patient Prep | General Communication / Reminders | | | | | |
| | Scheduling | | | | | |
| | Patient Registration / Intake Forms | | | | | |
| Customer Relationship Management | Marketing | | | | | |
| Contact Center | Phone Lines / Routing / VOIP | | | | | |
| Patient Education | Patient Satisfaction Surveys | | | | | |
| | Educational Materials | | | | | |
| Patient Financial Experience | Billing Notifications / Online Payments | | | | | |
| Telehealth | Video Visit Software | | | | | |
| Care Management | Population Health Registries | | | | | |
| | Care Management Programs | | | | | |
| Digital Engagement Channels | Patient Portal | | | | | |
| | WebChat | | | | | |
| Other | | | | | | |

*Please add in others as appropriate; we understand patient communication may go well beyond these initial areas (spanning across the entire patient journey) and new roles continue to form over time. Consider other key players such as marketing.



3

Establish a Governance Committee

If you were surprised – even flustered – by the volume of patient outreach you were able to uncover in your search in the previous step, you're not alone. When you realize just how many vendors and internal teams are attempting to communicate with your patients, you may begin to see how this can become an issue in due time – if not already.

On the positive side, this can also make us keenly aware of how valuable patient communication, particularly text messaging, can be for your entire organization – spanning across many departments and teams, and touching functions that cover the entire patient journey.

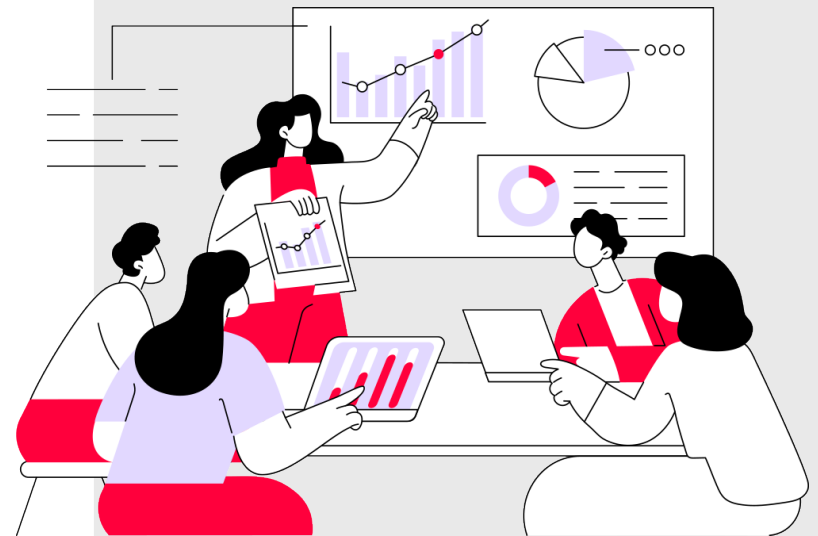
As with any initiative, however, trying to coordinate efforts with a variety of different stakeholders across your system can be overwhelming. For this reason, it's critical to build a governance structure – a team that includes various cross-functional leaders and will establish broad institutional guidelines aligned with the organization's priorities.

This committee, or innovation advisory group, will be instrumental in determining a healthy, cohesive patient communications strategy – one that honors your patients' preferences and boundaries while staying within regulatory guidelines. Since this will be an ongoing initiative that requires measurement, maintenance and optimization, consider defining any key stakeholders necessary to the group.

Above all, ensuring your patient communications strategy continues to evolve takes cross-functional effort, collaboration and alignment. Different teams may have different responsibilities, but developing a strong partnership with a core vision will keep your committee moving forward in lockstep.

This centralized group will determine an appropriate messaging structure on behalf of your entire health system. Members of the committee work together to:

- Review messaging strategy
- Document and assess ongoing vendor relationships
- Map communication sequences, priorities and timing
- Uncover and discuss patient feedback
- Measure, analyze and review data
- Identify and vet opportunities for improvement



Sample Committee Structure and Roles

What are the roles and responsibilities of the governance group members?

In order to maintain structure within the group, there must be a designated leader or Executive Sponsor to keep the momentum going. Each group member must also have defined expectations and responsibilities to ensure consistent analysis and optimization of the strategy. We've outlined an example governance structure, below.

| ROLE | RESPONSIBILITY | TITLE |
|--|--|--|
| Executive Sponsor | Liaison to the executive team Defines key goals and measures for success Leads regular group discussions to review messaging strategy Oversees the governance structure Reviews and assesses vendor inventory bi-annually | Chief Information Officer Director of IT Systems VP of Digital Transformation |
| Data & Analytics | Monitors success through defined metrics and analytics Reviews and uses data to support new messaging proposals and/or for retiring old messages Identifies any gaps toward goals based on data | Chief Data Officer Chief Analytics Officer Application Systems Analyst |
| Patient Experience / Patient Access | Develops roadmap to executive committee's decisions by mapping out messaging cadence, sequence and timing *Recommend working with legal team to co-create messaging guidelines that align with organizational standards Ensures the voice of the patient is heard; surfaces any relevant patient feedback on messaging | Director of Patient Experience Director of Patient Access Director of Patient Advocacy |
| Administration | Documents ongoing messaging strategy Documents proposals for new messaging and/or retiring old messages Works with data to identify improvements to operational workflows | Director of Administrative Services Director of Clinic Operations Practice Administrator |
| Legal and Compliance | Reviews regulatory guidelines and laws (TCPA, GDPR) frequently Determines how messages are communicated/what can be included Ensures messaging practices are aligned with existing regulatory compliance standards Ensures corrective action is in place to remedy any violations | Compliance Director |



Your Governance Structure and Roles

Now that you've seen an example of a potential committee on the previous page, it's time to start developing your own.

Here are several questions to consider to get you started:

- Who are the stakeholders with influence on and interest in a program like this?
- What departments should be represented?
- How do we ensure that the patient perspective is taken into account?

| ROLE | DEPARTMENT | RESPONSIBILITY | NAME & TITLE |
|------|------------|----------------|--------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |



4

Define the Desired Outcomes

Now that you've established a designated governance committee for patient communications, you're one step closer to optimizing your desired outcomes.

What do we mean by "Outcomes?" That's for you to decide. Whether it's to increase slot utilization, improve patient response rates, generate revenue, condense your tech stack or boost patient satisfaction, this is your opportunity to better understand and align on business goals. This goes back to the core vision your governance team has for the future.

Convene with the group to discuss and decide: What's the gap between where we are and where we want to be? What actions will we take to close the gap?

This is also the stage in which you'll likely start to better understand which messages should be sent at which times and in which cadence. Honing in on your aligned values as a team will help you prioritize communication, to which you'll want to start mapping out the order.

Now is also the time to consider other significant patient communication strategies that play a role in patient retention, engagement and even your bottom line. Are you customizing your messages? Do you offer patient communication in a variety of languages? Are your messages being sent via long-code or short-code?

24%

increase in patient response rate when patient communications are customized

21%

average improvement in response rate when message is sent in native language

79%

improvement in response rate when providers use long-code



Define the Desired Outcomes

This worksheet will help you determine your organization's business goals and desired outcomes in terms of patient communication. By better understanding your core vision, values and current strategy, your committee will be able to outline what actions are needed to close the gap and make strides toward those desired outcomes.

What are our strategic objectives / values as an organization?

What specific goals are we working towards regarding patient communication?

Is our current strategy delivering the results we're seeking?

What are the next few steps we can take to meet our goals?



5

Measure, Iterate and Improve

At this stage in the journey, you have successfully established a team of stakeholders who are committed to the vision you've uniquely built for your business. It's clear now that you want to optimize your messaging because you ultimately want to drive value.

To effectively measure the value you're driving, data and analytics will be your new best friend. If you're able to access rich, intelligent analytics from your tools, you'll be well on your way to making more data-driven decisions that help inform your patient communications strategy and improve the patient experience.

With your governance team, it will be critical to implement various measurements to determine how effective your patient communications strategy is and if there are any gaps you may have overlooked. This should be an ongoing process that requires continuous evaluation.

Data and insights are pivotal to optimizing your patient communications strategy.

For example, one Artera enterprise health system customer identified an opportunity to minimize message overload. After taking action, the organization saw an **80% decrease** in the number of patients that received more than five messages in one hour due to merged booking remediation work.

"In many areas of healthcare - financial management, operations, etc. - our decision-making is driven by data and performance metrics; the same should be true for patient engagement."

Meg Aranow

SVP, Platform Evangelist, Artera, and former CIO, Boston Medical Center



Measure, Iterate and Improve

This worksheet will help you identify the various measurements your team currently has to determine how effective your patient communications strategy is, as well as if there are any gaps you may have overlooked. To continue to iterate and improve upon your communications strategy, analyze and evaluate the variety of tools and data accessible to your organization.

Are we achieving the outcomes we want through our patient communication investments? Are we doing so at a good value point?

What systems and tools are we using to measure the effectiveness of those investments?

How are we reporting out on these metrics currently (if at all)? How frequently?

Are we able to independently analyze data from the various tools we use?

Are there specific reports or metrics that we wish we could measure but are unable to today?

What outcomes do we want to focus on? Revenue, clinical, patient, etc.?



Final Thoughts

Now that you have gone through the process of building out a more cohesive governance structure for your health system, you can move toward your business goals with full confidence knowing you strategically mapped out a stronger patient communications strategy: one that supports and honors your patients and improves your outcomes. We hope our guide has given you the support your health system needs to optimize your patient communications and the value it brings to your entire organization.

Ready to Harmonize Your Healthcare Communication?

- Would it be valuable to see a consolidated view of all of your patient communication in one place?
- Would it be valuable to have visibility into engagement data across your entire enterprise?
- Would it be valuable to coordinate outreach across all of these sources through one platform?

If you answered yes to any of these, contact us to learn how we can significantly improve your patient communications, engagement and business performance without putting more work on your staff.

Visit us at artera.io

Contact us at sales@artera.io



Artera acts as a single pane of glass for patient engagement.

Whether a healthcare provider deploys our patient communications platform or chooses a different solution, Artera delivers enterprise-wide visibility for healthcare providers to see every patient interaction and quickly identify patients who are being over-communicated. After all, how can healthcare providers fix what they can't see?

Guillaume de Zwirek
Founder & CEO, Artera



About Artera

Artera unifies patient communication to ensure that each person receives the right information at the right time, even when that care journey is complex or nonlinear. With deep EHR integration, patient experience expertise and best-in-class support, Artera will revolutionize how you communicate with your patients.

Artera Harmony – our robust patient communications platform:

- Delivers a cohesive patient communication experience by integrating across the tech stack with EHRs, single-point solutions, apps, partners and more
- Unifies disjointed communications and information into a single channel for patients through texting, email, or IVR
- Helps 700+ unique health systems facilitate 2.2 billion messages for 100+ million patients

Founded in 2015, Artera (formerly WELL Health) is based in Santa Barbara, California and has been named on the 2021 Deloitte Technology Fast 500 and ranked on the Inc. 5000 list of fastest-growing private companies for three consecutive years.

Learn more about [Artera Harmony here](#).

