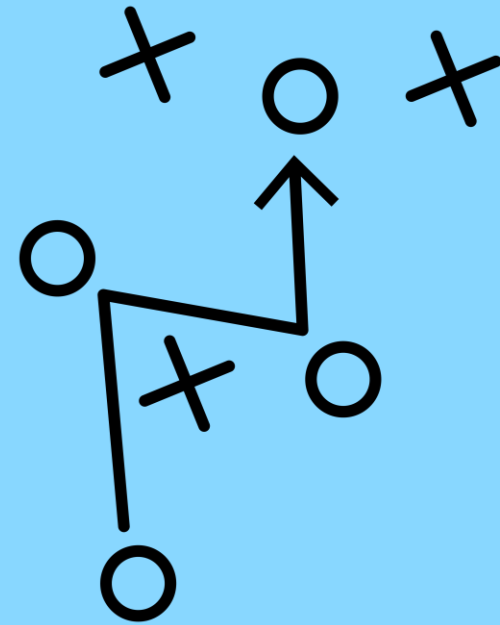


Clarify

Provider Growth Playbook

6 Plays for Health System
Strategy Leaders



The Field

As 40% of U.S health systems come off a year of negative margins and modest payer rate increases in 2023, margin management is more critical than ever before.

According to a survey conducted by The Healthcare Management Academy, CSOs and CFOs are laser focused on cost management strategies, optimizing sites of service, OP/ambulatory capacity, data and analytics to attract and retain consumers, data and analytics to improve decision-making, and financially sustainable recruitment and retention strategies.

To create stability during these challenging times, CXOs should concentrate on strategies that help grow revenue without driving up operational costs. The teams who can meaningfully unlock data insights to deliver on the promise of analytics and business intelligence technology will have an edge over their competition.

Unfortunately, electronic medical records are not a sufficient source of data to harness market, provider, and consumer intelligence.

Health systems that are succeeding rely on a holistic view of the patient journey across claims and social determinants of health data and have begun to leverage insights from hospital and payer price transparency data too. This playbook details how to leverage patient journey insights to drive precision growth.

In this playbook, you will learn six fast, repeatable, and effective plays leaders are using.

6 plays for health system strategy leaders to gain a competitive edge



Grow

market share by assessing patient flow in and out of your system

Increase

referral volume by understanding why patients are leaving your system

Understand

patient loyalty in your service area by assessing how they flow through each journey of care

Forecast

future utilization of healthcare services by reliably predicting changes at the service line, zip code, and site of service level

Discover

high-performing providers in your network to optimize referral patterns and prioritize physician acquisitions

Strengthen

payer negotiations with actionable price transparency insights

To save money while supporting long-term growth, you need:

Fast and precise insights to streamline decision making

1. Increase inbound referral volume from both employed and non-employed physicians
2. Make the right network and acquisition decisions to drive volume and improve clinical performance
3. Strengthen payer negotiations with competitive rate and market intelligence
4. Improve the patient experience to increase loyalty
5. Strategically invest in service lines that will allow to sustainably scale profit margins

A more holistic picture of patient journeys and demand

1. Actionable insights at the DRG/CPT level
2. Insights on referral patterns across all care settings, including PCPs, specialists, and ancillary services
3. Visibility into the patient journey beyond the IP setting, and into OP, ASC, SNF, and HH
4. A clear understanding of the medical and social needs of specific patient cohorts
5. The ability to understand the root cause of outmigration

Grow

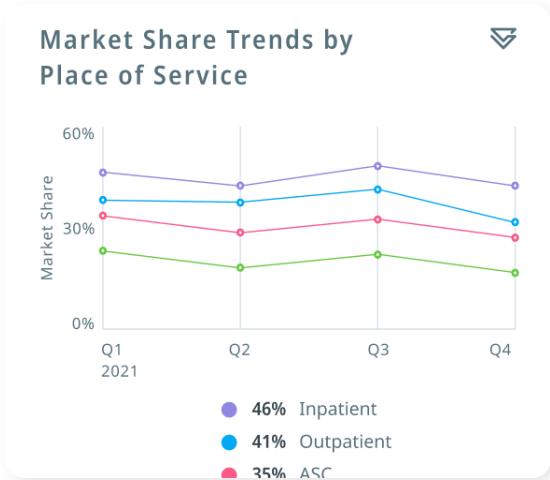
market share by assessing patient flow in and out of your system

Most hospitals entered 2023 operating at a loss with lower margins, reduced outpatient volumes, and rising costs. In an increasingly competitive environment, leaders in this space should seek out technological innovations that streamline insight generation so they can build a more precise growth strategy. Many legacy data and analytics solutions typically fall short when it comes to the completeness, transparency, and timeliness of data. Investing in the right data, analytics, and technology can be the difference between lasting market penetration and diminishing volume and revenue.

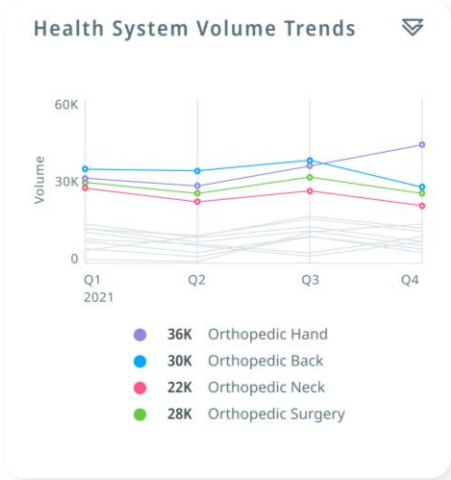
Strategy leaders looking to grow market share need real-time analyses of market trends and patient flows across service lines, sites of care, and geographies.



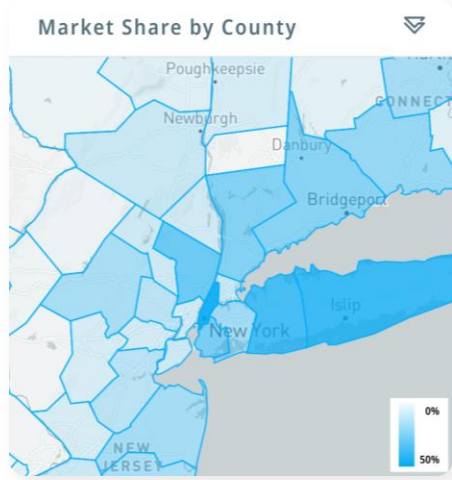
Run this play
assess market share trends across all care settings and analyze your competitive position to make strategic investment decisions



How is my market share across various settings of care changing over time?



What is my market share relative to competitors and how is it trending?



What is my market share by geography?

“Clarify is solving the issue of identifying physicians with the greatest amounts of quality and efficiency in a market to utilize in development discussions.”

Watch the replay

large medical center grows market share across HOPD and ASC

Summary

A large medical center wanted to grow market share across HOPD and ASC, but they had limited outpatient data in the oncology service areas. They used Clarify's analytics software with precise insights based on over 4 billion patient journeys to understand their position in the OP space, prioritize key regions with high outmigration, and uncover opportunities to increase patient volume.

Challenges

Identifying opportunities for service line growth and expansion

- This health system didn't have the OP data needed to accelerate market share growth in HOPD and ASC settings.
- The strategy team didn't have the level of granularity needed to identify the primary drivers of outmigration by geography and payer mix for their oncology service line.

Results & Highlights

\$50M opportunity identified

With access to insights including service mix, patient mix, site of care mix, and patient share of wallet within each region, the medical center was able to identify which regions had the highest margin volume and uncovered \$50M in opportunity.

\$50M

opportunity identified

The medical center identified \$50M in market share opportunity within one region by uncovering over 50,000 chemotherapy and infusion procedures that competitors render.

8M

outpatient and ASC claims

The system accessed 8 million claims in the ASC and OP setting for oncology procedures. With new insights into their market share, the team could enable better strategic growth planning.

15

new surgeons recruited

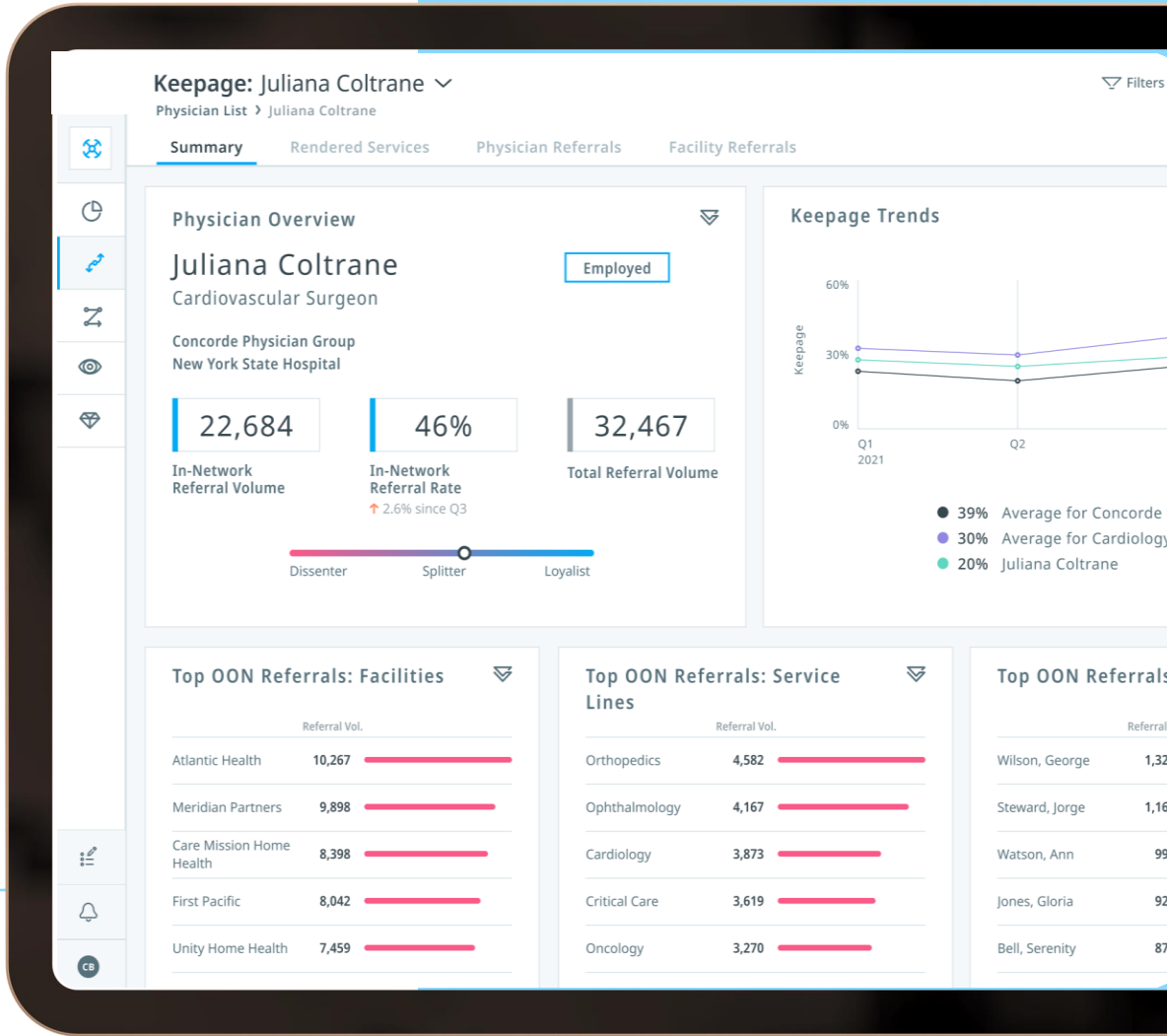
The health system assessed referral patterns among all oncology and oncology-related surgeons in the market and identified 15 high-volume oncology surgeons to recruit to capture referral volume.

Increase

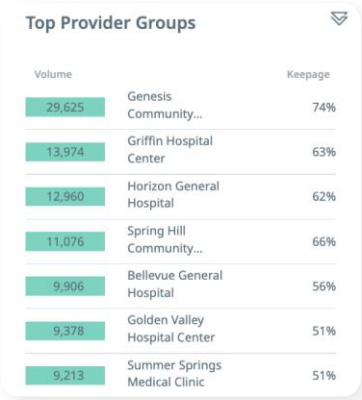
referral volume by understanding why patients are leaving your system

To achieve profitable growth, it's important to focus on driving referral volume and strengthening your network integrity. Increasing in-network referrals drives service line growth and gives you more control over the value of the care your patients receive. However, physicians have become desensitized to the same old outreach strategies. Having personalized, data-driven discussions with physicians about the impact of their referral choices on patient cost and outcomes can give them the motivation they need to make more-informed referral decisions. Physician liaisons can use insights into referral trends to prioritize their outreach to physicians with the highest-value opportunities to improve or to increase high-margin, high-volume referrals.

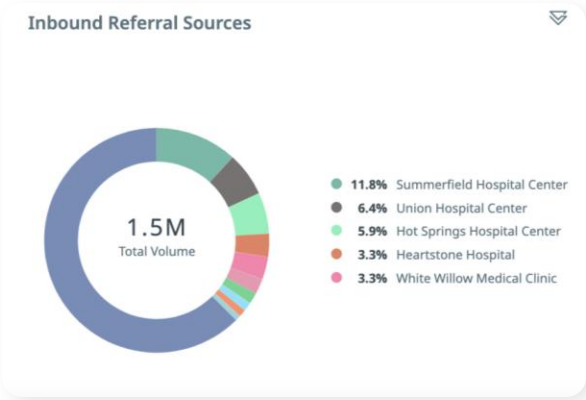
Health systems need precise insights and comprehensive referral analytics that go beyond the inpatient setting to get a clear picture of where patients are being referred, both in and out of network.



Run this play
analyze patient referral patterns down to the DRG/CPT level and uncover the drivers of out-of-network referrals



Which provider groups have an opportunity to improve keepage rates within my network?



Who is currently referring volume to my system?

Physician Alignment: Service Area

Referring Physicians Rendering Physicians

Physicians

| Referring Physician NPI | Referring Physician Name | Referring Physician Specialty | Referring Physician Group |
|-------------------------|--------------------------|-------------------------------|-----------------------------|
| 1689692949 | Smith, Steven | Radiology - Interventional | Not Specified |
| 1285660241 | Karimjee, Najmuddin | Family/Internal Medicine | PCP for Life |
| 1912101593 | Petitt, Matthew | Dermatology | Southeast Dermatology |
| 1730127705 | Bescos, Pilar | Family/Internal Medicine | Texas Health Physicians ... |
| 1225130743 | Carpenter, David | Family/Internal Medicine | Humble Family Practice ... |
| 1053339416 | Khan, Kamran | Family/Internal Medicine | Urgentcare MDs |
| 1184898553 | Thung, Elaine | Ophthalmology | The Permanente Medica... |
| 1376514208 | Nesser, David | Nephrology | Methodist Transplant Sp... |
| 1770682619 | Buzbee, Thomas | Family/Internal Medicine | Tyler Internal Medicine ... |
| 1417045303 | Scarborough, Kyle | Family/Internal Medicine | Family Life Medical (AKA... |

Where are the highest-value opportunities to partner with non-affiliated physicians?

“Clarify has given us the most granular insights across our entire market – we can see what physicians are doing, where they’re going, who they’re referring to, and how their patterns change by procedure.”



Watch the replay

health system keeps patients in network, grows patient volume, and creates stronger physician alignment

Summary

A large not-for-profit health system was looking to increase in-network volume and optimize physician referral patterns, but they lacked insights across all settings of care—PCPs, specialists, and ancillary care. By identifying high-volume specialists for engagement and acquisition and having more data-driven conversations with physicians, they increased referrals from employed and independent physicians.

Challenges

Understanding downstream referral patterns across their market

- This team needed more visibility on outpatient flow and downstream referral activity to understand how their network penetration varied across the care continuum.
- Their analyst teams were spending too much time aggregating and cleaning data, and not enough time identifying actionable solutions.

Results & Highlights

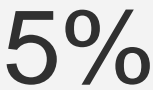
\$14M revenue growth in one year

By identifying high-volume specialists for engagement and acquisition and having more data-driven conversations with physicians, they increased referrals from employed and independent physicians across all services lines by 5% in one year, generating \$14M in revenue.



physician alignment

The business development team was able to have detailed, data-driven conversations with physicians that led to behavior change.



volume growth (overall)

Among employed and independent physicians, across all services lines, the system increased referral volume retention by 5% within a 1-year period.



volume growth (PCPs)

Among employed and independent PCPs the system increased net new referral volume by 2%, resulting in \$3.5M of new revenue.

Understand

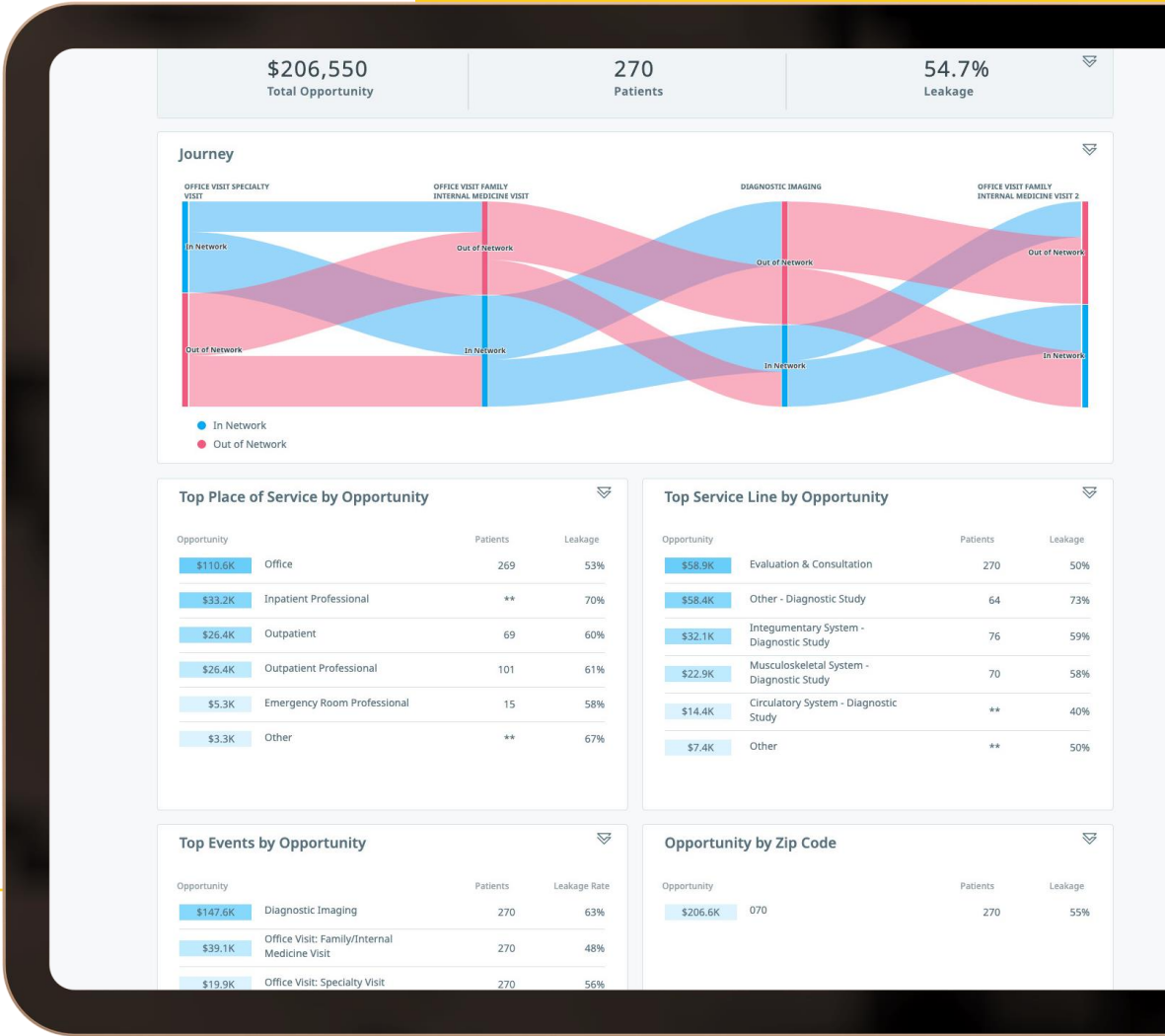
patient loyalty in your service area by assessing how they flow through each care journey


Meeting the needs of your community is paramount to your hospital’s long-term success as patients demand more sophisticated, convenient, and transparent care. According to a recent Accenture [brief](#), “50% of consumers say that one bad digital experience with a health care provider ruins the entire experience with that provider.”

Happy patients are loyal patients. Hospital strategy leaders can address their communities’ needs through physician alignment, smart service line investments, and consumer engagement programs.

But in order to act, they need more comprehensive data and insights they can trust. When you have a holistic view of a care journey, you begin to understand how patients move in and out of your network and across the healthcare system. Insights into the changing demographics of patient cohorts, including age, gender, health conditions, co-morbidities, and payer mix will help you strategically grow lines of business, expand into new geographies, and staff your hospitals appropriately.

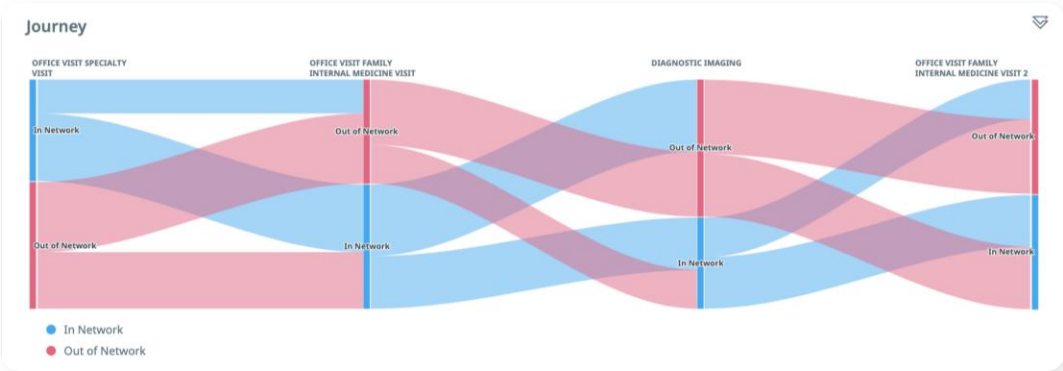
Strategy leaders should invest in the ability to analyze patient journeys and demographics to better understand and predict the demands of their market.





Run this play

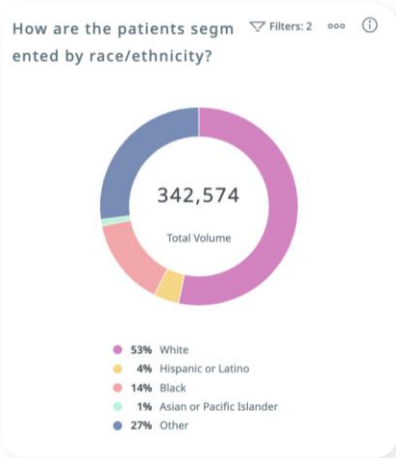
attract and retain patients with visibility into how patients flow through the healthcare system across the continuum of care



How do specific patient cohorts move in and out of network?
What are their entry/exit points through their journey of care?

| Breast Cancer | BMT | Kidney Transplant | Liver Transplant |
|-----------------------------|----------------------------|----------------------------|---------------------------|
| Opportunity <u>\$219.3M</u> | Opportunity <u>\$26.4M</u> | Opportunity <u>\$10.5M</u> | Opportunity <u>\$6.8M</u> |
| Patients <u>17,844</u> | Patients <u>561</u> | Patients <u>396</u> | Patients <u>80</u> |
| Leakage Rate <u>55.9%</u> | Leakage Rate <u>35.8%</u> | Leakage Rate <u>59.0%</u> | Leakage Rate <u>68.2%</u> |

What is the dollar value opportunity of keeping patients in-network?



What social, economic, or lifestyle factors may be influencing patients' care journeys?



Watch the replay

identify high-spend cohorts and understand their entry points and points of leakage through their journey of care



Follow the patient journey and track leakage points

Use case: Understand the behaviors of specific patient cohorts to pinpoint where/when they receive care, at what point in their journey do they leak, and drivers of leakage

Impact: Proactively meet your patients' demands and ultimately minimize potential leakage



Better understand your specific patients' needs

Use case: Gain visibility into demographics about your patient populations, the prevalence of certain conditions, and their SBDoH factors

Impact: The more you understand about your patient population, the better you can predict their demands, and then supply those demands



Quantify share of wallet opportunities

Use case: Understand patient loyalty and stickiness by determining those that have “touched” you once and how often they come back to you

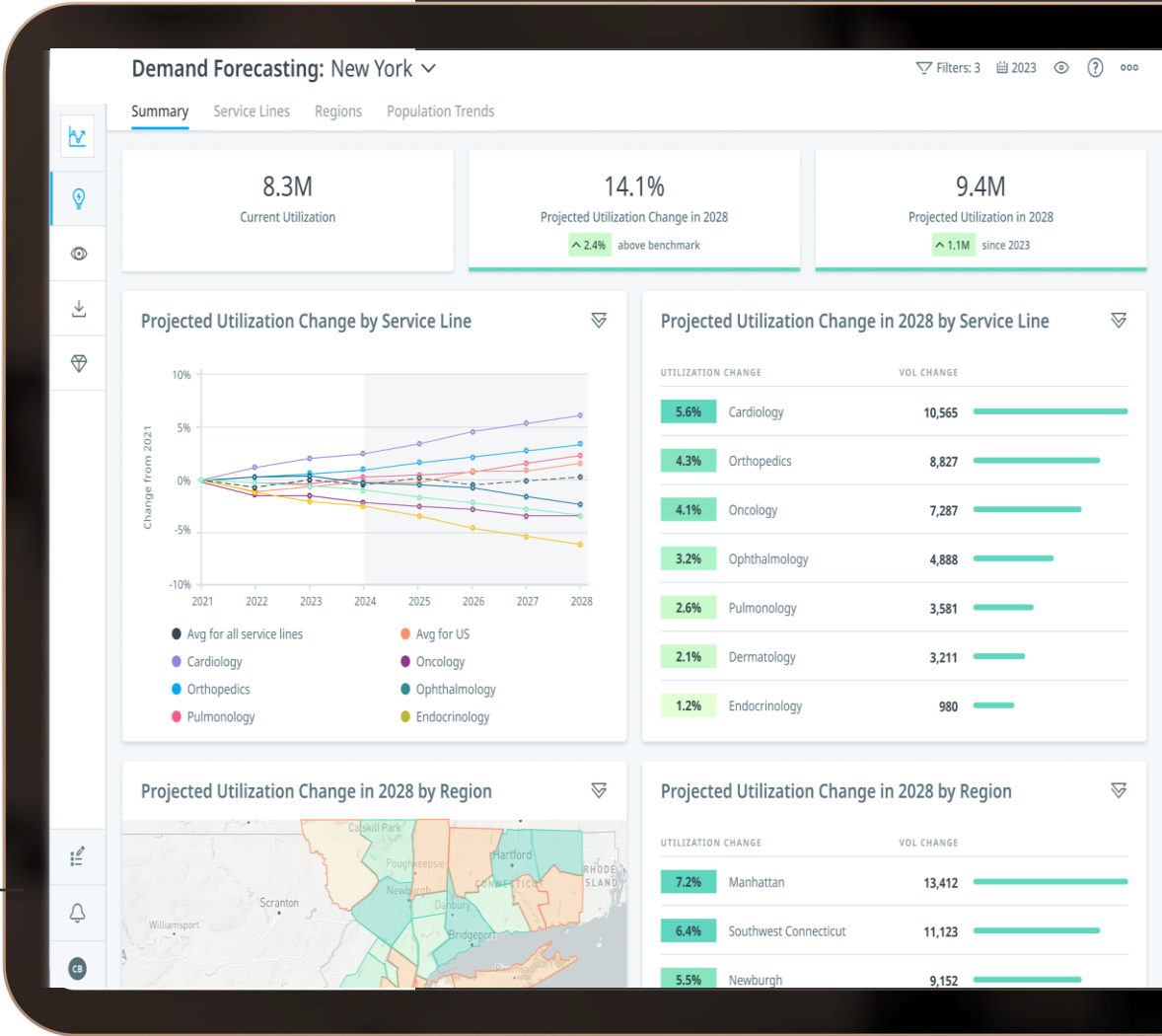
Impact: Quantify how much of a patient's utilization is captured at your facility and where areas of leakage occur by zip code and service line

Forecast

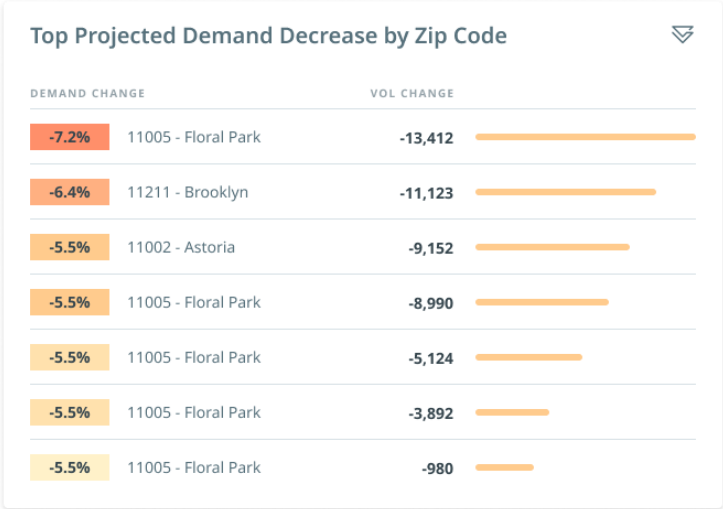
demand for healthcare services to mitigate risk and maximize return on strategic investments down to the service line and zip code level

In today’s healthcare environment, using historical claims data to inform decision-making is not enough. Health system leaders require the full picture – past, present and future – to fully understand how demographic and population-based changes will affect the demand for specific medical services and procedures. With on-demand and granular insights down to the service line and zip code level, you can reduce uncertainty and engage all available growth levers in order to plan ahead and maximize ROI. You know that healthcare is not a one-size-fits-all paradigm. Drive alignment, save hundreds of analyst hours per week, and get to action faster with transparency and confidence in your projections.

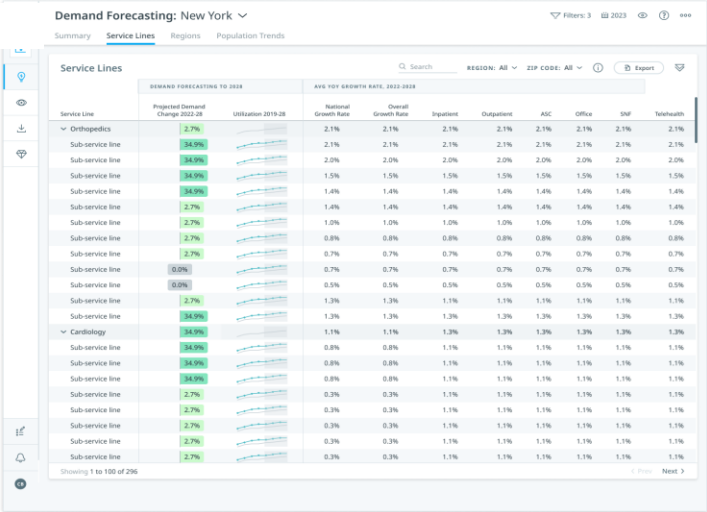
Seamlessly integrate demand forecasting capabilities within your growth solution to confidently act on specific, long-term growth plans up to 5-years in the future.



Run this play
predict where, when and how consumers will be seeking healthcare services



Which specific zip codes will see the greatest decrease in demand for healthcare services?



Which service lines will be impacted within my metropolitan service area?

“Clarify's demand forecasting is exactly what we have been looking for, and the visuals are even nicer than we imagined.”

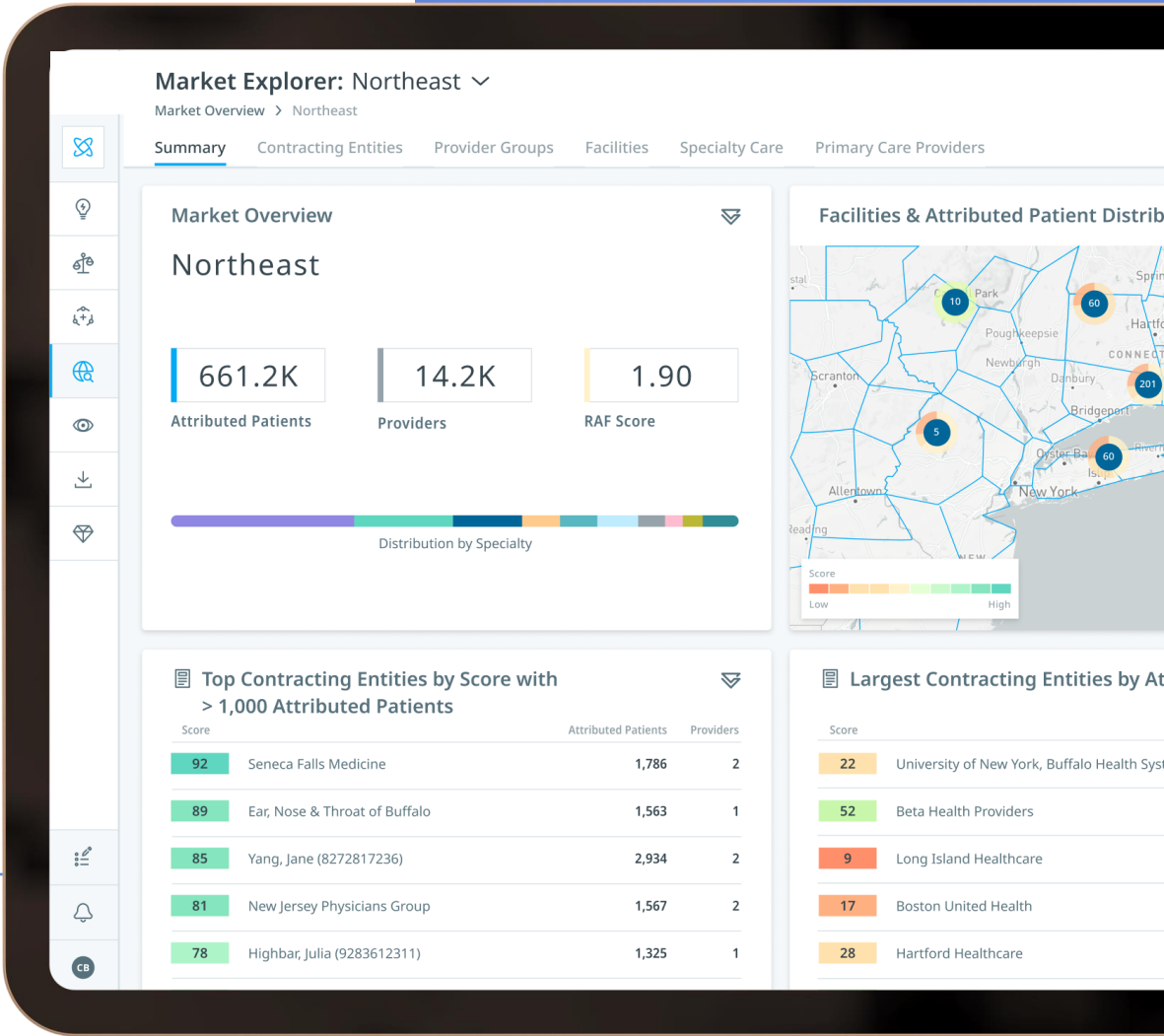
Discover

the highest-performing providers in your network, optimize referral patterns, and prioritize physician acquisitions

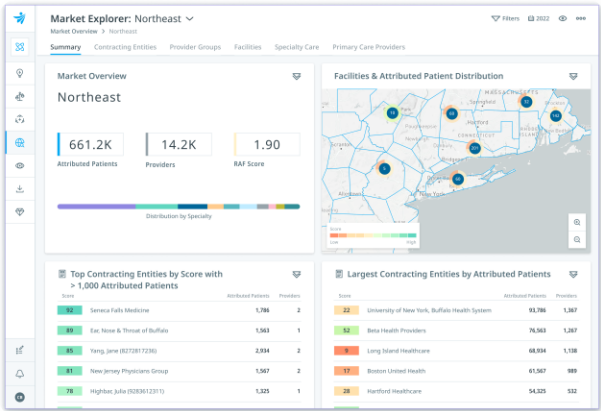
In today’s hyper-competitive landscape, uncovering opportunities to drive higher-value care is a constant need. Improving provider network integrity and ensuring that referrals are sent to the highest-performing providers can be a highly effective strategy to grow volume and increase value.

Electronic health record (EHR) data is too narrow to provide data on the broader marketplace and traditional claims analytics lack the quality metrics needed to assess physician performance. Without a holistic view of provider performance both in and out of your network, it’s difficult to determine if your organization is optimized for strategic growth.

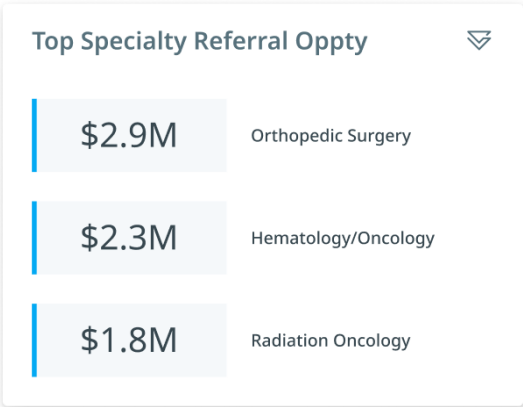
With comprehensive referral analytics alongside precise, case-mix adjusted provider performance benchmarks, you can ensure that you are optimizing your network with high-performing providers.



Run this play
benchmark provider performance, optimize referral patterns, and prioritize physician acquisitions



How can I optimize my network to achieve immediate revenue growth and ensure future success in risk-based arrangements?



How can I identify higher-value specialists to redirect referrals to improve outcomes?



How can I quantify the dollar opportunity in redirecting referrals to higher-value providers?

“Clarify Health helps us compare our organizations with others in our region. It also allows us to further evaluate the performance of physicians who we want to partner with.”

Watch the replay

drive short-term and long-term revenue growth and future-proof your system during a transition to value



Identify the best-fit physicians leveraging precise, case-mix adjusted benchmarks

Use case: Prioritize opportunities to redirect referrals to efficient, high-quality providers in the market

Impact: Improve care delivery and reduce medical spend



Optimize network performance with real-time quality, efficiency, and referral pattern insights

Use case: Identify top-performing providers to expand the network into new and existing markets, and prioritize physicians for partnerships as you enter into new risk arrangements

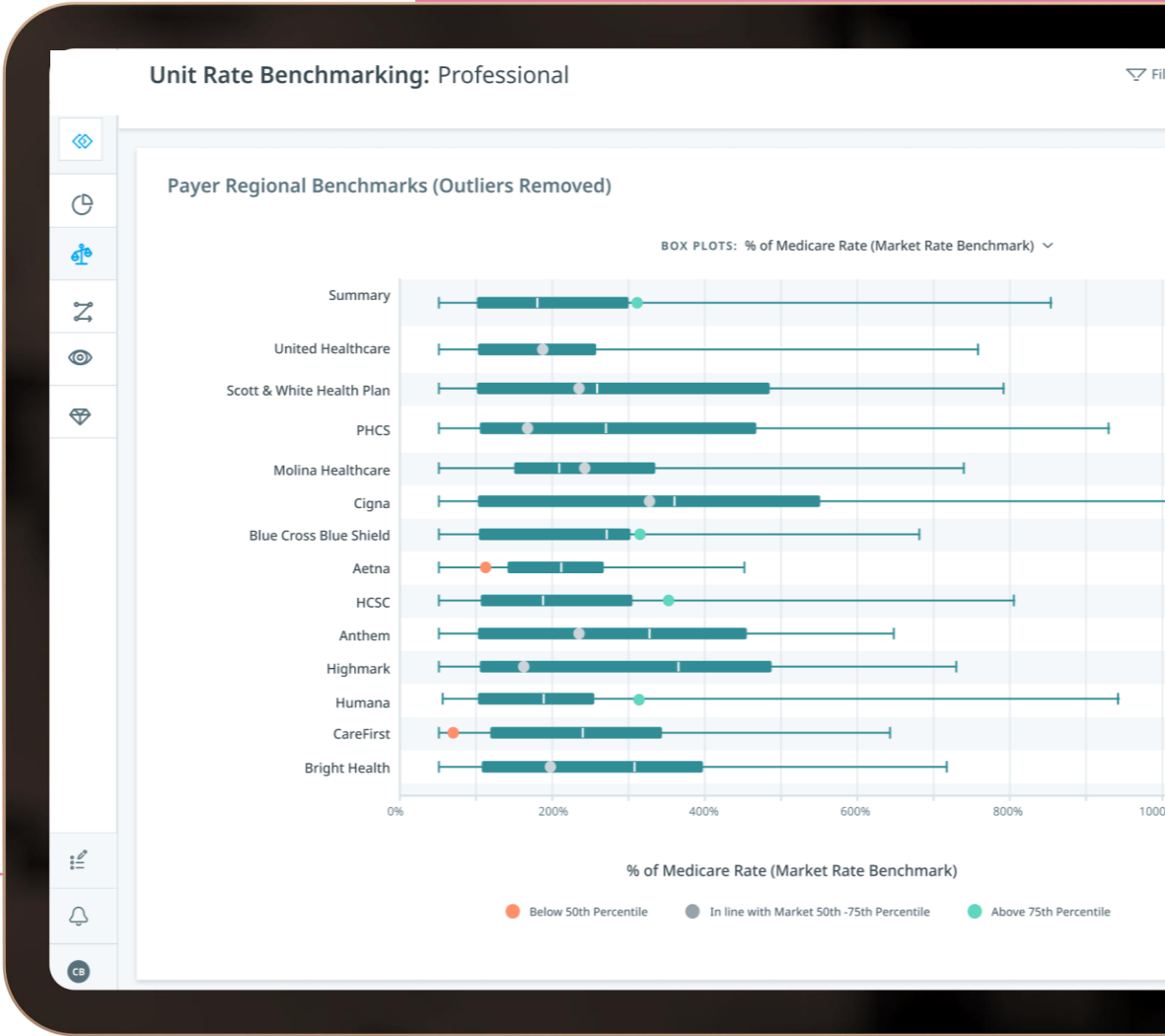
Impact: Find the best providers, hospitals, or physician groups broken out by geography, provider specialty, or service line to inform network design, optimize care navigation, and view granular analytics on individual provider performance.

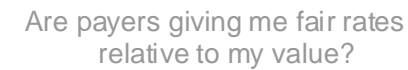
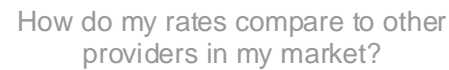
Strengthen

payer negotiations with price transparency insights

Healthcare providers and systems need to leverage insights from healthcare price transparency data to ensure market and financial competitiveness when negotiating with payers. While many providers recognize the need for data-driven rates insights, they tend to miss the mark by relying solely on publicly reported rates data. This leads to a lot of internal time spent on aggregating data, scrubbing it, and conducting manual analyses. If you've tried pulling down this data manually, you probably recognize the challenges of dealing with messy data and enormous file sizes. Hospital leaders should instead be leveling the playing field by leveraging on-demand rate intelligence that has been aggregated, cleaned and enriched to deliver meaningful market prices.

Strategy leaders should utilize on-demand rate intelligence that can be easily and quickly filtered to streamline contract negotiations, allowing more time for meaningful discussion rather than data review.





“With Clarify’s rate data, our team can now leverage the combined power of Clarify’s provider quality performance insights in tandem with rate insights to fully assess provider performance and help our members get the higher quality outcomes they deserve at an affordable price.”

Watch the replay
achieve higher and more equitable
reimbursements for high-volume services

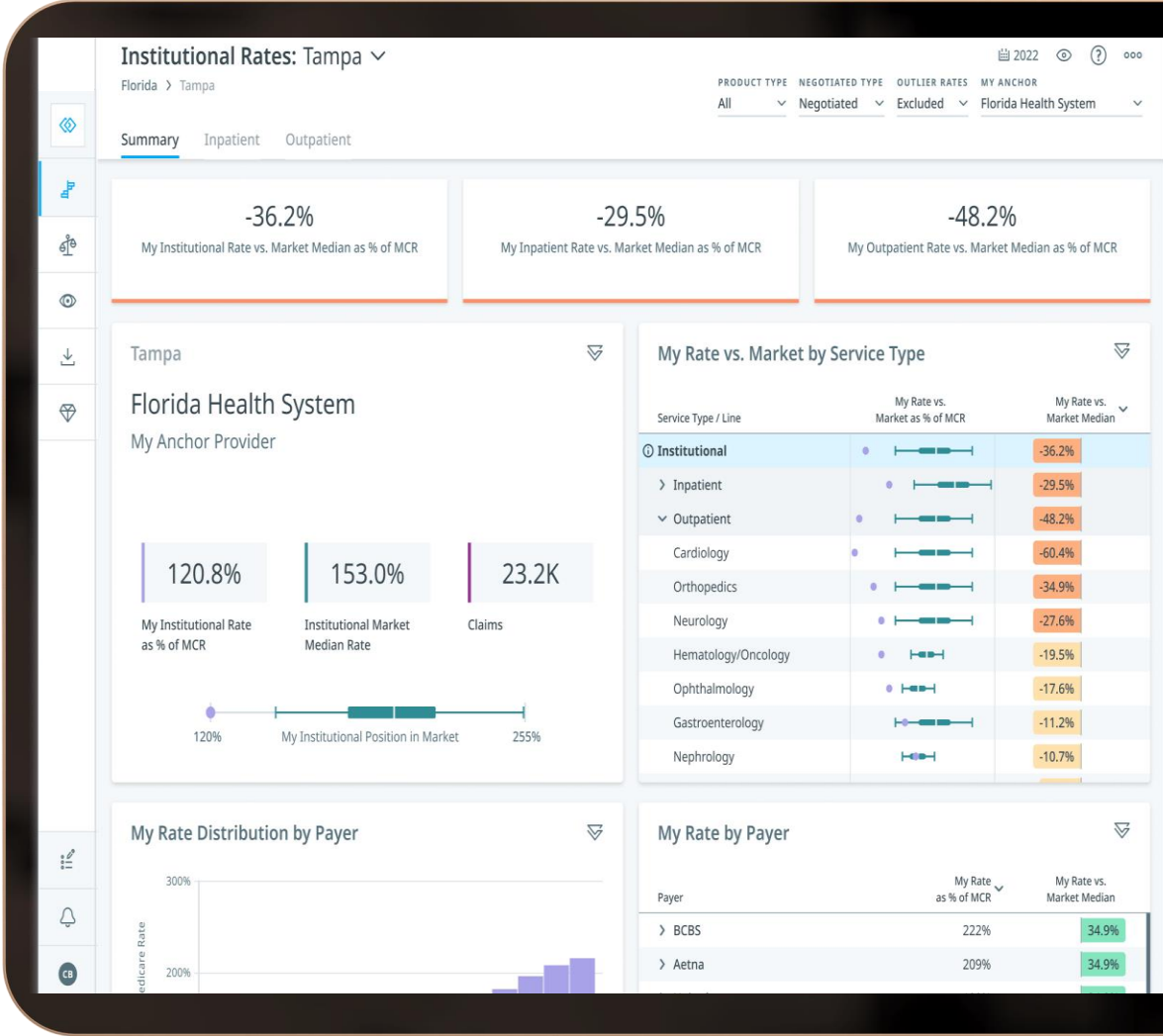
Summary

The required release of hospital and payer rates under the CMS Price Transparency rules is a welcomed mandate. However, the public rate data that has been released is complex and challenging to work in its raw state. It contains trillions of records, is not consistently formatted, and includes payer-specific gaps in reporting, revealing a web of convoluted healthcare pricing in the commercial market today. To become actionable, rates data needs to be enriched with claims data so teams can view the rates that actually matter for payers and providers while filtering rates that will never be utilized.

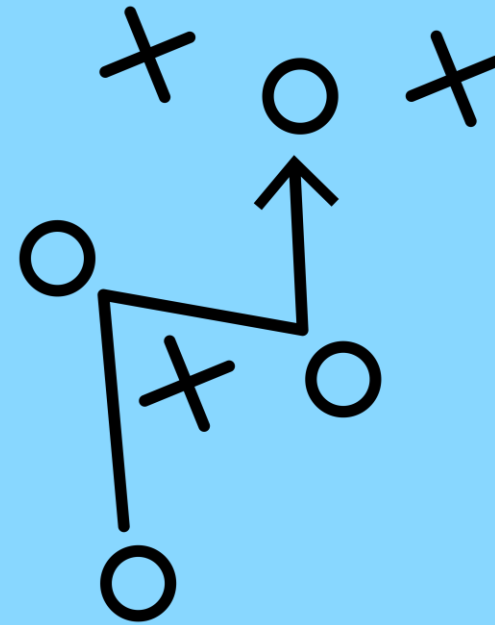
Run this play

The goal of this play is to gain leverage going into negotiations with payers. Using rate intelligence, you can uncover where you are paid below market and then drill down to understand areas of exposure by service line and service code.

By integrating insights from claims alongside rates data, you can add the critical dimensions of service mix and volume. This enables the display of the weighted percent of Medicare prices (versus straight average) to better inform your understanding of the true economics and value delivered.



To overcome the ever-increasing challenges to drive positive margins, increase patient volume, and make care more affordable, hospital executives need to make the right investments today that will pay off in the future. By running these 6 plays, health systems can supercharge their strategic plans, drive smart service line growth, improve physician alignment, strengthen negotiating power, and gain a deeper understanding of the patient's journey to increase loyalty. Whether you're working with internal analytics or searching for an enterprise analytics partner, ensure you're able to run these plays to gain a competitive edge and grow revenue.



About Clarify

Clarify Health unlocks valuable healthcare insights making complex decisions easier. The foundation is the Clarify Atlas Platform®, leveraging the industry's largest and most robust dataset, to map over 300 million lives to deliver more than 20 billion AI-powered predictions, delivering actionable insights with unparalleled speed and precision. Clarify employs stackable building blocks architected to streamline the complexity of care decisions in five key areas: topline growth, cost containment, care guidance, data leverage, and expertise.

To learn more about Clarify Health and the benefits of its high-performing healthcare insights, please visit www.clarifyhealth.com.