

Clarify

# Growth IQ

## USE-CASES & BUSINESS QUESTIONS



# Probing Questions

*While outlined in the slides by use case, the following are a list of complete probing questions that a CI or CS Team member can utilize to engage in a deeper, more use case driven conversation with customers.*

## Business Questions

- What are your focus areas over the next 12 months?
- Has there been a specific service line focus in the past? What service lines are you focusing on?
- How do you prioritize which service lines to focus on today?
- Historically how have you evaluated market share, provider performance, and keepage rates?
- What data do you use for your strategic planning?
- What other data sources are you using in combination with Clarify to understand market position and planning going forward?
- Who are your largest competitors? Do you have goals to grow past any of your direct competitors? How are you planning to grow in these areas?
- What is your baseline market share within your region, PSA, etc.?
- What are your annual growth goals? By Service line?
- Do you have a physician liaison team that focuses on provider outreach? How are they organized? By region, by specialty?
- Are you investigating potential provider or facility acquisition over the next year?
- Do you have any new provider groups or facilities that you are looking to grow volume during the next 12 months?
- Do you offer PAC services through partnerships vs. in house?

# Probing Questions

*The following questions can specifically be utilized to further obtain sign off on ROI .*

- How would you have accomplished this without using Clarify data?
- Have you presented this to executives? If so, what are you reporting out? What has been most helpful?
- How did you typically make this decision?

# Standard Service Line Reporting

Use-cases & business questions

A close-up photograph of a person's hand holding a light blue square card. The card is held between the thumb and index finger, with the other fingers curled. The card has a slight gradient and rounded corners. The text 'Use Case #1' is printed in a dark grey, sans-serif font in the center of the card. The background is a plain, light grey.

Use Case #1

# Use Case #1: Standard Service Line Reporting

## Use Cases from Customer

- I want to report out on my competitive ranking by service line.
- I want to see how volume is shifting from myself to a competitor.
- I want to build my strategic plan for the next fiscal year.

## Probing Questions

- What service lines are you focusing on?
- Has there been a specific service line in the past?
- What data do you use for your strategic plan?
- Who are your largest competitors?
- What are your annual growth goals? What are your growth goals by service line?

## Base Line Measures

- Market Share/Volume by Service Line vs. competitors
- Volume Rank compared to competitors
- Total Opportunity by Service Line



# Use Case #1: Standard Service Line Reporting

## Soft KPIs

- New service lines/specialties added
- Deciding NOT to add service line/specialty
- Regular dashboards saved time to make business decisions
- Standardized executive reporting
- Service line strategic planning and prioritization inputs
- Time savings to make decision

## Hard KPIs

- Increase in Year over Year/Quarter over Quarter Market Share/Volume by service line
- Savings by not adding service line/specialty
- Volume growth by adding service line/specialty
- Shift in rank compared to competitors by service line
- Volume increase compared to competitors that dropped





# Growth by Service Line Expansion

Use-cases & business questions

A close-up photograph of a person's hand holding a light blue square card. The card is held between the thumb and index finger, with the other fingers curled. The card has a slight gradient and the text 'Use Case #2' is printed on it in a dark grey font. The background is a plain, light grey.

Use Case #2

# Use Case #2: Growth by Service Line Expansion

## Use Cases from Customer

- I just launched a new service line. Where should we aim to be in the market using my competitors' current share?

## Probing Questions

- Are there services you don't offer today that you are looking to expand into?
- How do you prioritize which service lines to focus on today?
- What data do you use for your strategic plan?
- Are you looking to add any new specialties?
- What are your annual growth goals? What are your growth goals by service line?

## Base Line Measures

- Market Share/Volume by Service Line vs. competitors
- Volume Rank compared to competitors
- Total Volume Opportunity by Service Line





# Use Case #2: Growth by Service Line Expansion

## Soft KPIs

- New service lines/specialties added
- Deciding NOT to add service line/specialty
- Regular dashboards saved time to make business decisions
- Standardized executive reporting
- Service line strategic planning and prioritization inputs
- Time savings to make decision

## Hard KPIs

- Increase in Year over Year/Quarter over Quarter Market Share/Volume by service line
- Savings by not adding service line/specialty
- Volume growth by adding service line/specialty
- Shift in rank compared to competitors by service line
- Volume increase compared to competitors that dropped



# Growth by New Service/Facility Offering

Use-cases & business questions

A close-up photograph of a person's hand holding a light blue square card. The card is held between the thumb and index finger, with the other fingers curled. The card has a slight gradient and rounded corners. The text 'Use Case #3' is printed in a dark, sans-serif font in the center of the card. The background is a plain, light gray.

Use Case #3

# Use Case #3: Growth by New Service/Facility Offering

## Use Cases from Customer

- I want to potentially offer XYZ service or open a new facility. What volume already exists in the market for that given service today?
  - If we have identified a service line of focus, where would be the best geography to place a facility?
    - Where are patients traveling from and to for care?
    - How far are patients traveling for that care?
  - What are our competitors offering that we don't offer?

## Probing Questions

- What data do you use to make this decision today?
- How would you quantify success of this facility opening? Have you set any goals to measure success?
  - While sharing Volume, does this estimate feel like a fair value estimate?

## Base Line Measures

- Total Volume by Facility/Group (Ranking)
- Total Volume by Zip Code with Facility and Service Line
- % Outmigration from key service area
  - Patient Zip Code to Facility Zip Code



# Use Case #3: Growth by New Service/Facility Offering

## Soft KPIs

- Deciding to Go/No Go decision about new service/facility offering
- Patient Satisfaction
  - Outside organization satisfaction reports
- Time savings to make decision
- Marketing decisions

## Hard KPIs

- Total Volume Opportunity to Go/No Go about new service/facility offering
- Total Volume increase for new facility/service line offering
- % Market Share rank increase for service line/facility offering
- Decrease in outmigration from patients within your facility zip code
- Increase in total patient panel for new service line/facility offering
- Increase in new patient visits



# Growth by Acquisition

Use-cases & business questions

A hand is holding a blue square card. The card has the text "Use Case #4" written on it in a white, sans-serif font. The hand is positioned at the bottom of the frame, with the thumb and index finger holding the card. The background is a light gray gradient.

Use Case #4

# Use Case #4: Growth by Acquisition

## Use Cases from Customer

- Provider: We don't currently offer a certain specialty and are looking to acquire a provider group that does the service line.
- ASC Facility: We are looking at an existing ASC Facility to bring on board.
  - What are these ASCs doing in certain services?
  - What patients are traveling there for care?
  - Can we draw more patients by acquiring that ASC?
- Facility: We're looking to acquire this facility. What volume is done at a procedural level at this facility?
  - How are their services shifting from IP to OP?

## Probing Questions

- Are you looking at evaluating any groups/facilities to acquire?
- What data points do you look at to evaluate groups/facilities?
- How would you quantify success of this acquisition?
- How many new providers did you acquire?
- How is your executive team valuing this investment?

## Base Line Measures

- Total Volume by Facility/Group (Ranking)
- Total Volume by Service Line
- Total Volume by Site of Care
- Total Volume by Zip Code/Facility
- Baseline Market Share Volume
- # of Referrals received today from group in interest





# Use Case #4: Growth by Acquisition

## Soft KPIs

- Deciding to Go/No Go decision about acquisition
- Patient Access
- Increase in overall footprint/expansion
- Time savings to make decision

## Hard KPIs

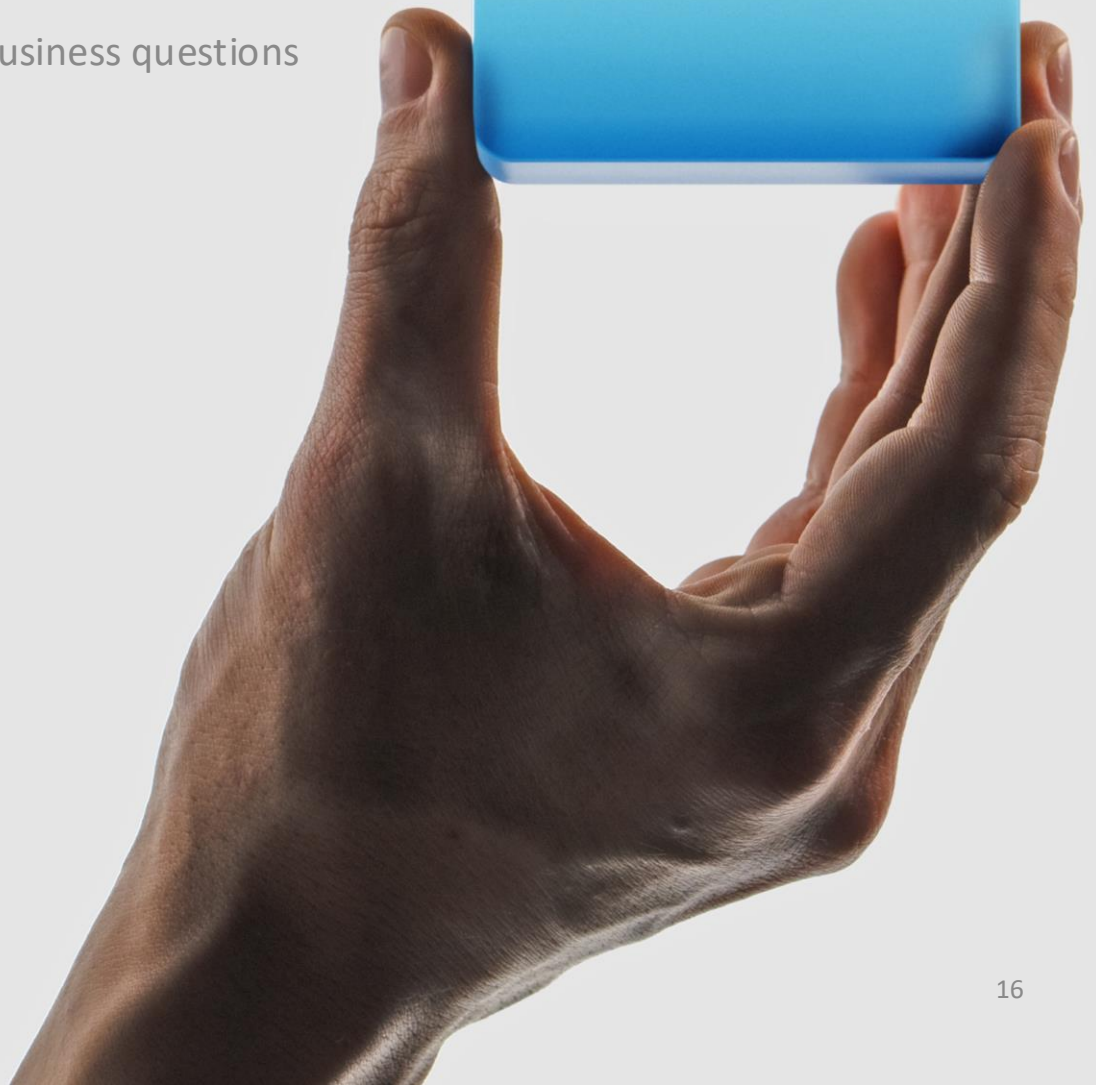
- Potential new Market Share/Volume increase from acquisition
- Total Volume/Market Share increase attributed to acquisition
- Competitive rank increase attributed to acquisition
- # of providers/facilities acquired



# Site of Care Transitions

Use-cases & business questions

Use Case #5



# Use Case #5: Site of Care Transitions

## Use Cases from Customer

- What services are shifting from IP to OP to ASC?
- What facilities are further along the transition of care to a lower acuity?

## Probing Questions

- Do you have a goal to shift a certain percentage of procedures from IP to OP? What is it?

## Base Line Measures

- Total Volume by Site of Care vs. competitors
- Recent trends by site of care



# Use Case #5: Site of Care Transitions

## Soft KPIs

- Time savings to make decision
- CIN efficiency
- Identification of IP procedures to switch to OP
- Marketing decisions

## Hard KPIs

- Increase in OP Market Share/Volume for IP shifted procedures
- VBC success



# Provider Recruitment

Use-cases & business questions

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Use Case #6

# Use Case #6: Provider Recruitment

## Use Cases from Customer

- I want to bring on a new orthopedic physician. Who are the top providers by volume that would bring services to my organization?
- Which independent providers refer to my organization that would make good partners?
- Is there a provider group that's highly aligned with my organization?
- If we were to recruit that organization, who would we need to make sure we're targeting to ensure we retain the referrals they are receiving?

## Probing Questions

- Liaisons
  - How are they goaled?
  - How are they currently identifying physicians for outreach?
  - How are they organized for initiatives – service line or geography?
  - Do they target the same providers?
  - Do they target independent physicians?
  - What do they discuss during provider outreach?
  - Can you share the number of visits each liaison is doing? How is that tracked?
- How would you value the revenue impact of one referral?

## Base Line Measures

- Current Keepage Rate
- Current # of In Network providers
- Volume of provider groups in evaluation





# Use Case #6: Provider Recruitment

## Soft KPIs

- Time savings to make decision
- Provider satisfaction
- Physician liaison efficiency due to custom target lists
- Decrease in overlap of physician targeting
- Targeting higher scoring providers/groups

## Hard KPIs

- % change in Keepage Rate for targeted physicians
- # of new physicians acquired
- # of new physicians targeted
- # of new specialties/service lines to target
- \$ increase in Keepage volume for targeted physicians
- # of new zip codes targeted for physician outreach



# Post Acute Care Planning

Use-cases & business questions

A hand is holding a blue square card. The card has the text "Use Case #7" written on it in a dark blue font. The hand is positioned at the bottom of the card, with the thumb and index finger visible. The background is a light gray gradient.

Use Case #7

# Use Case #7: Post Acute Care Planning

## Use Cases from Customer

- Who are our potential Post Acute Care partners?
- Who are our biggest competitors?
- Are my patients going to my preferred Post Acute partners?
- Are there certain services where patients are leaving my preferred Post Acute network?
- Are patients being discharged to the wrong Post Acute Care setting based on their diagnosis?

## Probing Questions

- Do you have a Post Acute Care team?
- Do you offer PAC services through partnerships vs. in house?
- Do you have a PAC strategy? How often is that updated?
- What is the value of retaining a patient within a PAC setting?

## Base Line Measures

- Total Volume in Post Acute Care Setting and rank compared to competitor
- Current Keepage Rate/Volume for preferred Post Acute Network



# Use Case #7: Post Acute Care Planning

## Soft KPIs

- Time savings to make decision
- Provider satisfaction
- Physician liaison efficiency due to custom target lists
- Decrease in overlap of physician targeting
- Targeting higher scoring providers/groups

## Hard KPIs

- % change in Keepage Rate for targeted physicians
- # of new physicians acquired
- # of new physicians targeted
- # of new specialties/service lines to target
- \$ increase in Keepage volume for targeted physicians
- # of new zip codes targeted for physician outreach



# Succession Planning

Use-cases & business questions

A close-up photograph of a person's hand holding a light blue square card. The card is held between the thumb and index finger, with the other fingers curled. The card has a slight gradient and rounded corners. The text 'Use Case #8' is printed in a dark, sans-serif font in the center of the card. The background is a plain, light gray.

Use Case #8

# Use Case #8: Succession Planning

## Use Cases from Customer

- My doctor is retiring and I want to plan ahead.
  - Who were their referrals coming from?
  - Where did they send most of their patients to?

## Probing Questions

- How have you approached physician retirement/exit in the past?

## Base Line Measures

- Current Referral Volume for provider looking to retire both from and to that provider





# Use Case #8: Succession Planning

## Soft KPIs

- Time savings to make decision
- Referral source target list for retiring doctor
- Liaison efficiency

## Hard KPIs

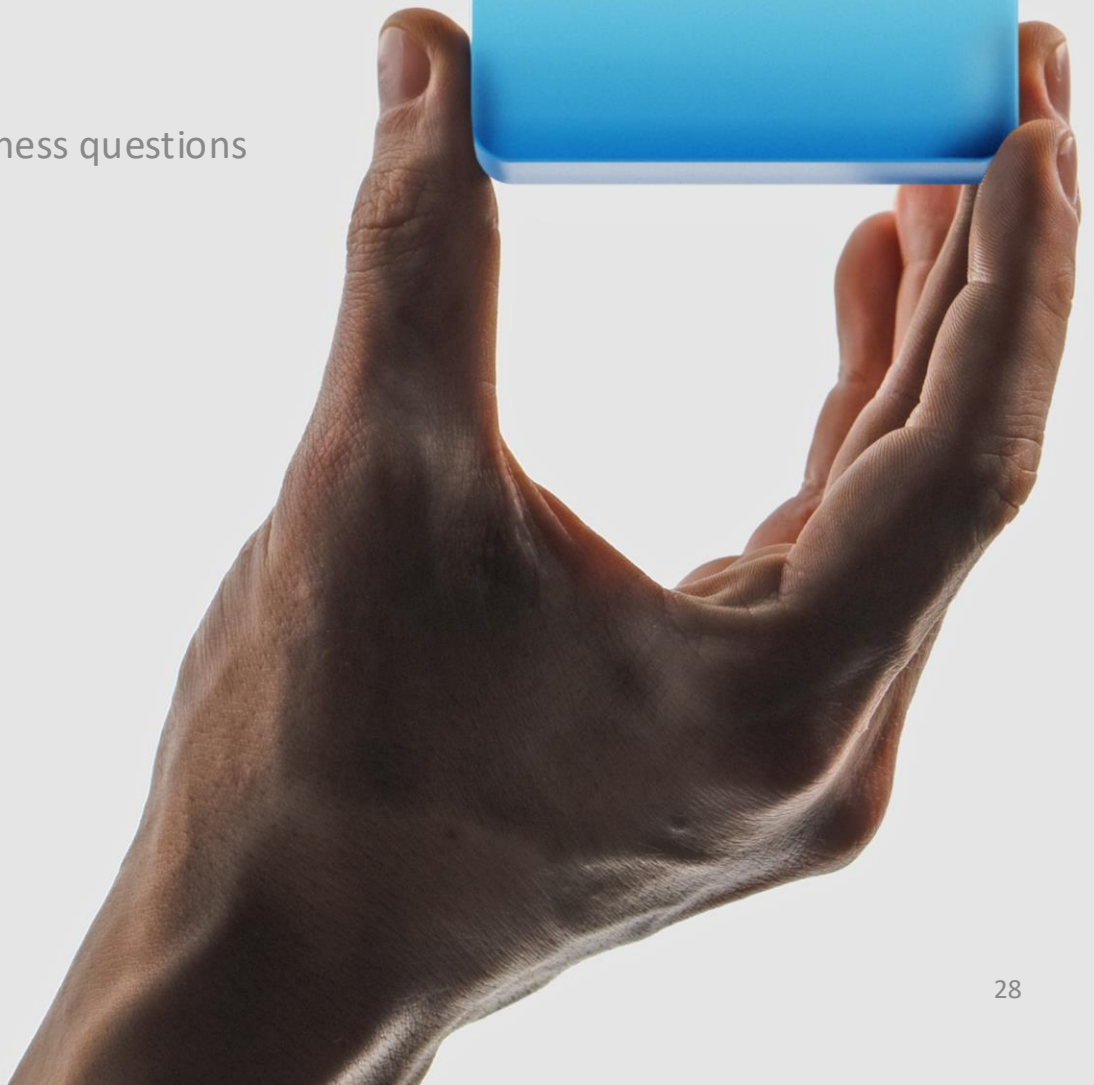
- Maintained/Increase in referrals from previous referral sources



# Physician Outreach Prep

Use-cases & business questions

Use Case #9



# Use Case #9: Physician Outreach Prep

## Use Cases from Customer

- Who do I put on my liaison's target lists?
- What type of information can I bring into a doctors office? What questions should I be prepared to ask?
  - I see you're sending referrals out of network. Why? Is it certain diagnoses or common procedures?
- Can I introduce any providers to one another?

## Probing Questions

- What do your liaisons do to prep going into physician conversations?
  - Do they use any type of call prep planning resources?
- How do your liaisons decide who they are targeting throughout the week?
- Do your liaisons use SFDC to track their conversations with providers?

## Base Line Measures

- Current/Historic providers targeted for outreach
- List of In-Network Providers



# Use Case #9: Physician Outreach Prep

## Soft KPIs

- Time savings to make decision
- Documentation/background going into physician outreach conversations

## Hard KPIs

- Out-of-Network Volume Opportunity for shifting referrals to In-Network physicians
- % Change in Keepage Volume for targeted physician



# Network Integrity

Use-cases & business questions

A close-up photograph of a person's hand holding a light blue square card. The card is held between the thumb and index finger, with the other fingers slightly curled. The card has a subtle gradient and rounded corners. The text 'Use Case #10' is printed in a dark, sans-serif font in the center of the card. The background is a plain, light gray.

Use Case #10

# Use Case #10: Network Integrity

## Use Cases from Customer

- What providers are sending patients out of network? How do we better align with them?
- Which of our In-Network providers are low hanging fruit to re-drive referrals in network?
- Why are providers sending patients out of network if it's across a given specialty?

## Probing Questions

- How do you identify leakage from In-Network physicians?
- Are there certain goals for increasing/maintaining Keepage rates from internal physicians?
- What is your current baseline of Keepage rate for your internal physicians?
- What have you used historically to track internal referrals?

## Base Line Measures

- Current Keepage Rate and Volume
- Current # of In Network providers
- Current Leakage Volume





# Use Case #10: Network Integrity

## Soft KPIs

- Time savings to make decision
- Preferred SNF network design
- CIN efficiency
- Service line strategic planning

## Hard KPIs

- Volume increases/shifts to preferred PAC facilities
- Average days decrease in PAC setting



# Specialized Disease Cohort Planning

Use-cases & business questions

A close-up photograph of a person's hand holding a light blue square card. The card is held between the thumb and index finger, with the other fingers curled. The card has a slight gradient and rounded corners. The text 'Use Case #11' is printed in a dark grey, sans-serif font in the center of the card. The background is a plain, light grey.

Use Case #11

# Use Case #11: Specialized Disease Cohort Planning

## Use Cases from Customer

- At what point in a patient's journey are they leaving our system? At what point in the journey are patients coming in to my system?
- Are there physicians referring out of network some point in the journey?
- Within a patient's specific journey, where is the most opportunity?
  - Do we struggle to get patients in the door right away?
  - Once a patient is diagnosed, do they shop around and go elsewhere?
  - Once a patient has a procedure, do they go to other locations for Post Acute Care/rehab?

## Probing Questions

- What are some specialty service line offerings that you manage for more complex patients?
- What is your goal for maintaining patients throughout their care journey within specialized cohorts?
- What is the value of maintaining a patient throughout multiple points of care?
- How have you tracked patient journeys before Clarify?

## Base Line Measures

- Starting Opportunity for each cohort
- Volume of leaked patients at pre-trigger, trigger, and post-trigger
- Opportunity by specific surgery within each cohort



# Use Case #11: Specialized Disease Cohort Planning

## Soft KPIs

- Time savings to make decision
- Standardized Executive reporting
- CIN efficiency
- Identification of leakage points
- Decision to target/not target point of leakage

## Hard KPIs

- Increase in Keepage %/Volume for identified point of care
- \$ change in opportunity dollars for shifts in point of care/service line



# Patient Access

Use-cases & business questions

Use Case #12



# Use Case #12: Patient Access

## Use Cases from Customer

- Are patients dropping out of my network because an imaging center isn't located near them?
- Are patients going to a competitor because it is closer than your organization?
- Are patients not traveling for certain types of services?

## Probing Questions

- What types of ancillary services do you offer?
- Do you partner with any facilities for lab, imaging etc.?
- Do you have any way to track patient access currently?
- Do you have a way to track patient satisfaction?

## Base Line Measures

- Current Keepage Rate/Volume
- Out of Network Opportunity (\$)
- Leakage Rate (%)
- Out of Network Downstream Opportunity (\$)
  - By Zip Code
  - By Patient Condition
  - By Trigger Event
  - By Site of Service



# Use Case #12: Patient Access

## Soft KPIs

- Patient Satisfaction
- Marketing Decisions

## Hard KPIs

- Increase in Keepage %/Volume for targeting marketing campaign
- Increase in Keepage %/Volume for Patient Zip Codes
- Decrease in Out of Network Opportunity (\$)
- Decrease in Leakage Rate (%)
- Decrease in Out of Network Downstream Opportunity (\$)

