



# Turning Big Data Into Big Revenue:

Automating AI & Activation for Digital Transformation



**Ben Seyden**

Vice President:  
Healthcare Strategy



**Chris Pace**

Senior Director:  
Digital Marketing



**Brock Bassetti**

Senior Director:  
Digital Access



# Forward Looking Statement



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**Thank you**





# Relationships Make Up Our Company DNA

TRUST

CUSTOMER SUCCESS

INNOVATION

**#1 CRM**  
 Customer Relationship Management



EQUALITY

SUSTAINABILITY

**20+ Years**  
 Serving the Health Industry

*\* 3rd Largest software company globally*

# What Keeps Healthcare Marketers Awake at Night?

## Prioritizing Compliance



The increased focus on personalized messaging is balanced against heightened scrutiny of privacy practices.

## Harnessing Data



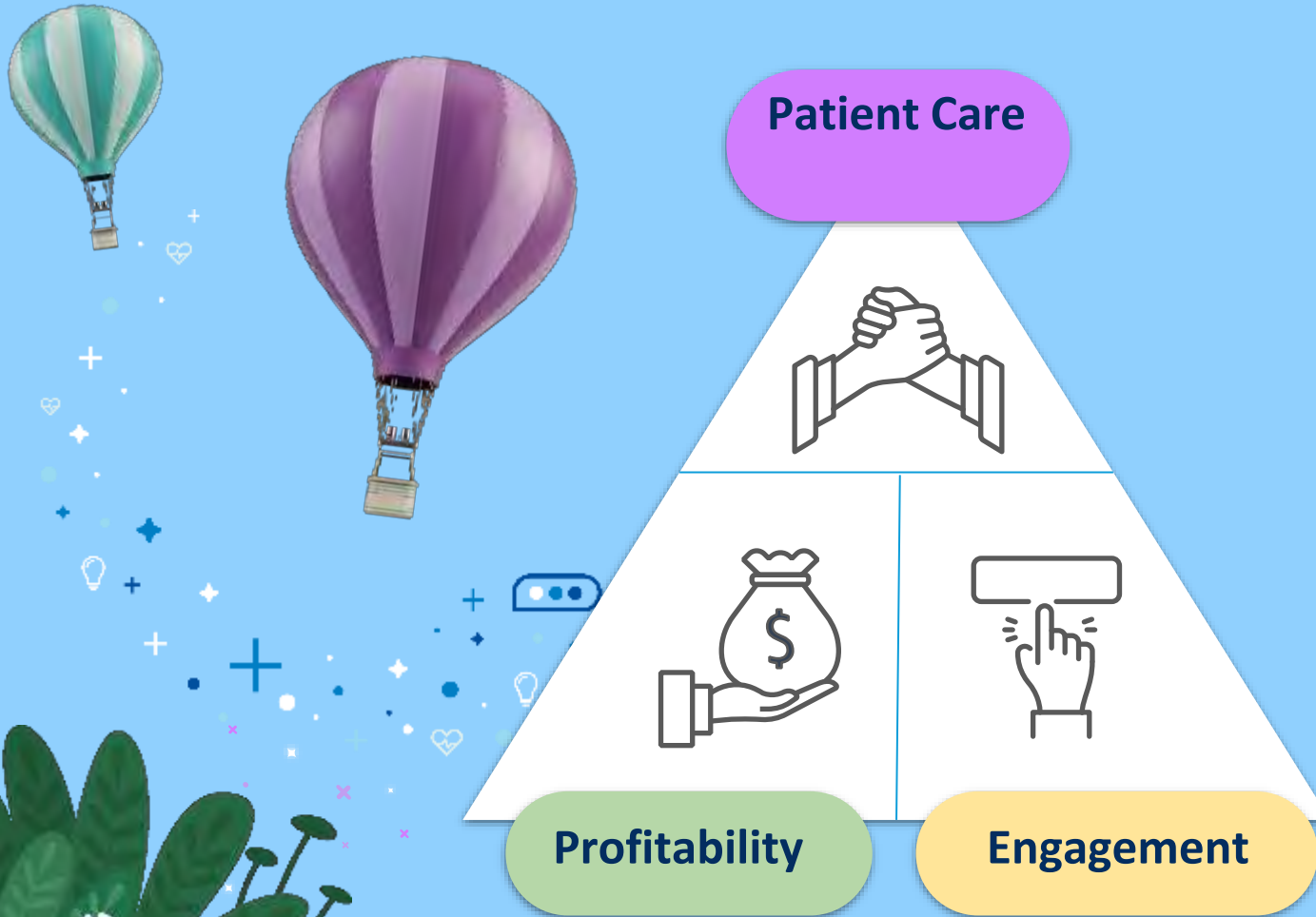
Healthcare knows it needs to prioritize using AI. Data will be at the core of any strategy, even if they haven't developed it yet.

## Driving Revenue



Every healthcare entity is facing smaller margins and tightening budgets. Marketers are increasingly being pushed to prove their value to the organization.

# The Delta of Healthcare Marketing



*We treat you  
like the most  
important patient  
we've ever had . . .  
because you are.*

Healthcare System in the Chicago Area

Patients want  
a provider with a  
strong **digital presence.**



of consumers will  
choose one provider  
over  
another because of a  
**strong online  
presence.**

**Holding Open the  
Digital Front Door**



# Making health care easier, so life can be better.

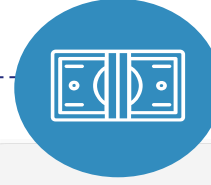
One of the **largest**, nonprofit health care systems in the country and the **leading** nonprofit provider of hospital services in all the communities we serve.

## Banner Health at a Glance



**1.2m**

Covered Lives



**14.1B**

Revenue  
(2023)



**55k**

Team  
Members



**2k**

Employed  
Providers

**In 6 States:** AZ, CA, CO, NE, NV & WY.

**33** acute care hospitals, **30** outpatient imaging centers, **50** urgent care locations

**15** retail and specialty pharmacies + post acute, surgery centers, labs, research, and more.

Health Plans: Banner Medicare Advantage, Banner | Aetna, Medicaid, DSNP



Banner  
University Medicine



# GOAL:

Deliver a **Cohesive** and **Frictionless**  
Customer Experience

Digital Front Door

Intelligent Contact  
Center

Omni Channel  
Patient Engagement

Consumers

Patients

Members

Research

Providers

Data Platform

# Delivering the Personalized Front Door



## DIGITAL EXPERIENCE

### Elevate the Online Experience

1. **Generative AI** multilingual Translation
2. Easy apt access: 500k+ generated
3. **Get Care Now**: Symptom Checker triages patient for best care option
4. Prominent website real estate for online portal access

The screenshot shows the Banner Health website interface. At the top, a dark navigation bar contains links for 'Set My Location', 'Español', 'Enable Accessibility', 'Careers', 'Classes + Events', 'Help Paying Your Bill', 'Patient Resources', 'Billing', and 'Sign in to Patient Account'. Below this is the Banner Health logo and a search bar with options for 'Find a Doctor', 'Find a Location', and 'Conditions and Services', alongside a 'Get Care Now' button. The main content area features the text 'We're here for you, from the comfort of home.' and two prominent buttons: 'Book An Appointment With Your Doctor' and 'Access Video Urgent Care'. A symptom checker overlay is visible on the right, titled 'Experiencing symptoms and need help?' and 'Let's start with your symptoms and go from there.' It includes a 'Start Over' button and a series of questions: 'Welcome to the Banner Health Symptom Checker. Let's do our best to see what's going on.', 'First, I need to factor in a couple of quick details.', and 'Are you answering for yourself or someone else?' with 'No' and 'Someone Else' options. A sidebar on the right offers 'Know where you're going?' with options for 'Emergency Care' (for life-threatening emergencies), 'Urgent Care' (for non-life-threatening needs), and 'Book an Appointment' (to find a provider and schedule online). A footer note states 'Banner Health is a safe place for care, learn more.'

1

2

3

4

# Delivering the Personalized Front Door



## KNOW THE PATIENT

### Communicate on the Patient's Terms

- Keeping consumers engaged and informed drives positive experiences
- Banner's CRM has nearly **8 million contacts** and centralizes communication for general wellness content, customer service, appointment reminders, etc.
- in 2023 they sent over 60M emails, with a 40% open rate, resulting in **25M read emails**.



## RELEVANT CONTENT

### Deliver Engaging Content

- Align SEO research and trending topics to fuel content
- 360 articles from SMEs in 2023
- Web Traffic Increase from 2018-2023
  - ↑ **3,900% Blog Visits**
  - ↑ **623% Site Visits**



## BEST TECHNOLOGY

### Invest in the Best Technology

- 500k+ app downloads
- **\$7.5m revenue** and labor savings w/online scheduling
  - ↑ **400k Urgent Care**
  - ↑ **170k Primary Care**
  - ↑ **65k New Patient**

# AI Powering the Future Digital Front Door



## Web Property Optimization

- Forecast trends in customer behavior, allowing the site to dynamically adapt to seasonal or geographic trends
- Expand language translation to include more languages to better serve our patient population



## Generative AI

- Generate dynamic content personalized to the individual who is visiting the website
- Create custom copy, images and video to personally engage the visitor
- Automate next best recommendations for visit types, like flu shot, screening, etc.



## Autonomous Call Deflection

- Implement increasingly complex symptom checker prompts
- Improve chatbot interactions with improved learning and human language responses

Patients want a seamless experience when contacting their provider.



of US patients are satisfied with their healthcare provider's **call center service**.

**The Intelligent  
Contact Center  
Fulfills Demand**



# Challenge: Converting Digital Leads

## The Problem:

### The Beautiful Digital Front Door Led to a Brick Wall

- Marketing made the phone ring – operations didn't answer
- Low cost per lead, high cost per conversion

### Especially low conversions in high margin service lines

- Decentralized clinic scheduling provided an inconsistent and unreliable phone experience
- Scaling a unified call center was a challenge due to complexity and physician trust



# Solution:

## OneBanner – an Intelligent Call Center Agent Platform

1 Implementing a call center at scale is a challenge due to the inherent complexity in healthcare

- Intelligent, data rich, AI enabled call center agent platform built on Salesforce Health Cloud

2 **OneBanner - Health Cloud Agent Platform**



Patient calls - Genesys cloud embedded CCaaS screenpops patient



Agent sees relevant patient 360 in a single pane of glass



Agent uses Medchat + Isabel Agent Assist AI bot to triage symptoms

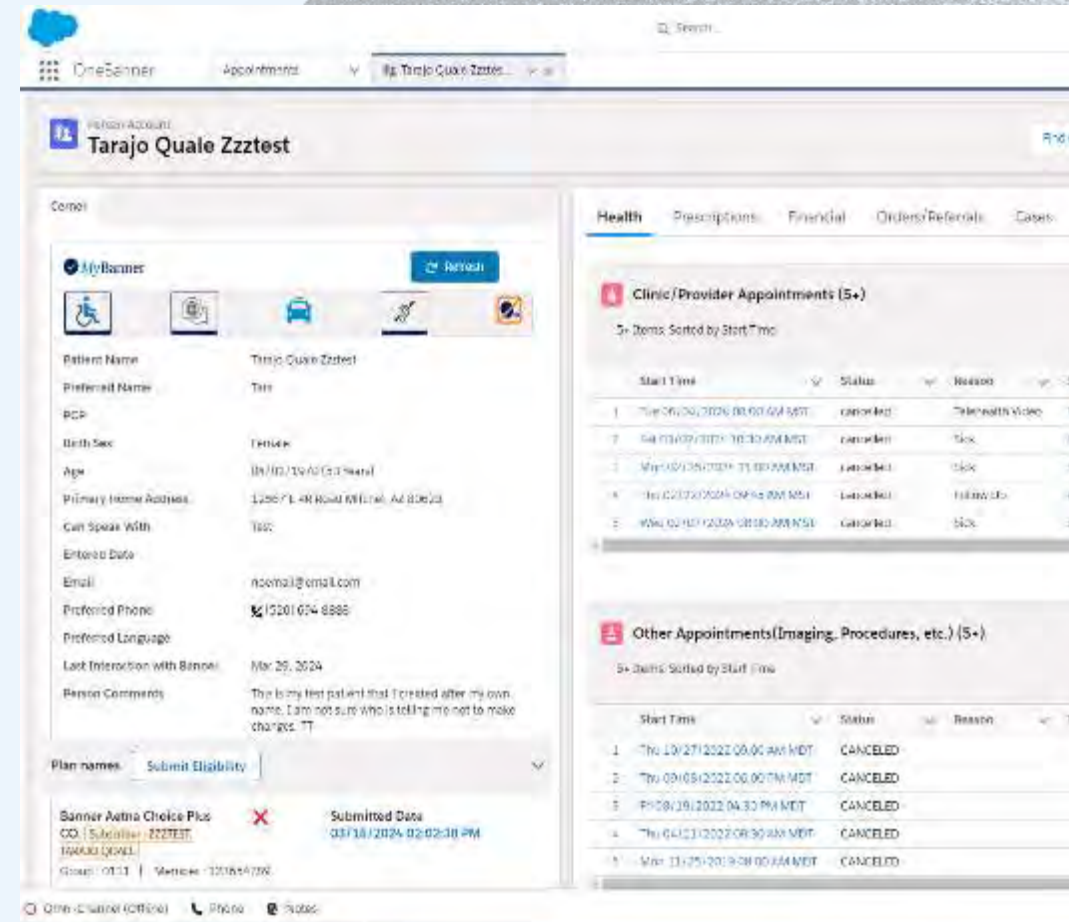


Agent is guided through a scheduling workflow to pick the right provider



The patient is scheduled and all data flows to the EMR

SF Einstein recommends other appointments and offerings Patients should have to be their healthiest

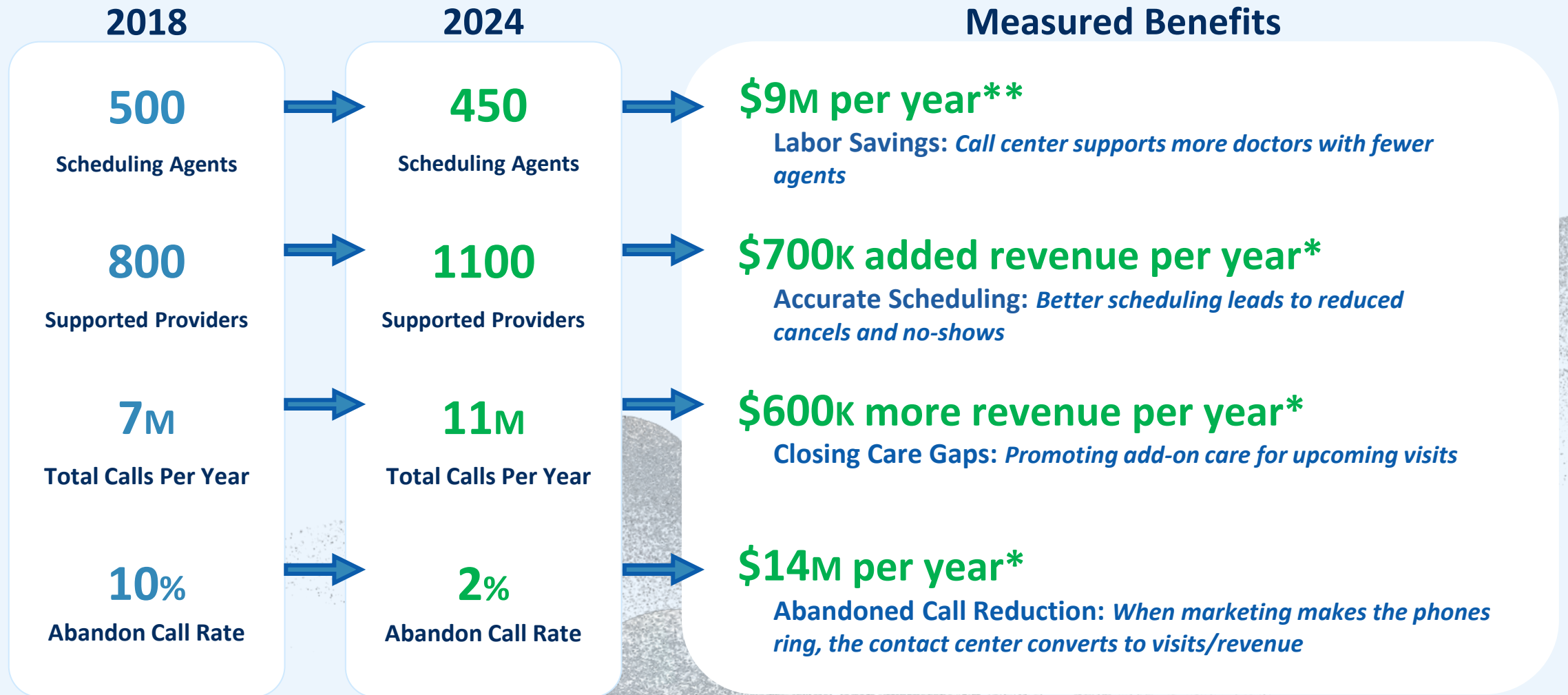


# Big Data + AI = Big Revenue and Savings





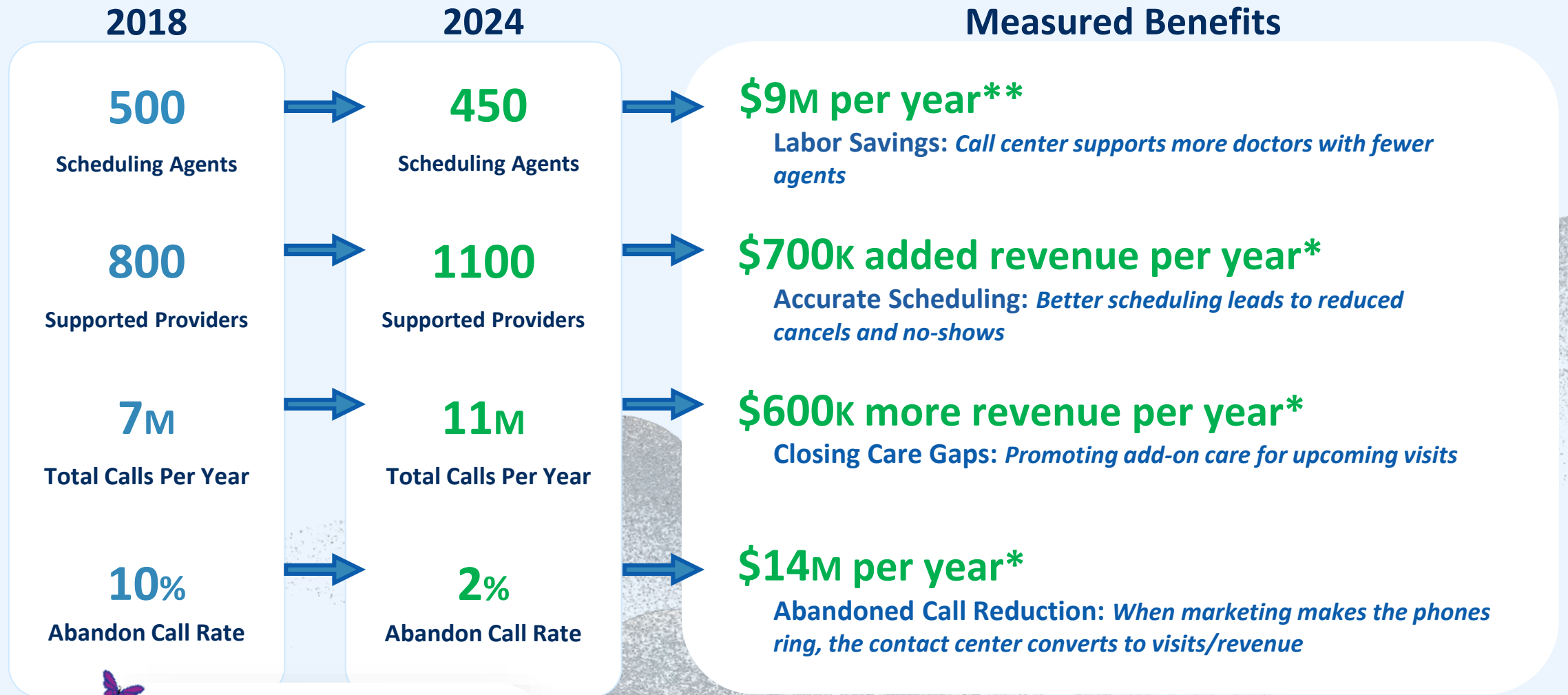
# Big Data + AI = Big Revenue and Savings



\*\$100 for an office visit code of 90213 for all revenue calculations

\*\*\$50k total cost for a call center FTE

# Big Data + AI = Big Revenue and Savings



**\$24.3M** in total impact per year

\*\$100 for an office visit code of 90213 for all revenue calculations

\*\*\$50k total cost for a call center FTE

# AI Powering the Future Centralized Contact Center



## Generative AI

- Patient summaries
- Next Visit Recommendations
- Automated case notes



## Chain-of-thought Conversation

- Find the perfect match based on Patient needs, symptoms, insurances, etc.
- Guide the patient or agent to provide all the necessary information



## Full AI Automation

- Delightful conversations with voice and chat bots that can fully automate human interactions
- Schedule appts, ask questions, complete transactions, etc.

Patients want  
**personalized**  
experiences on  
every channel.

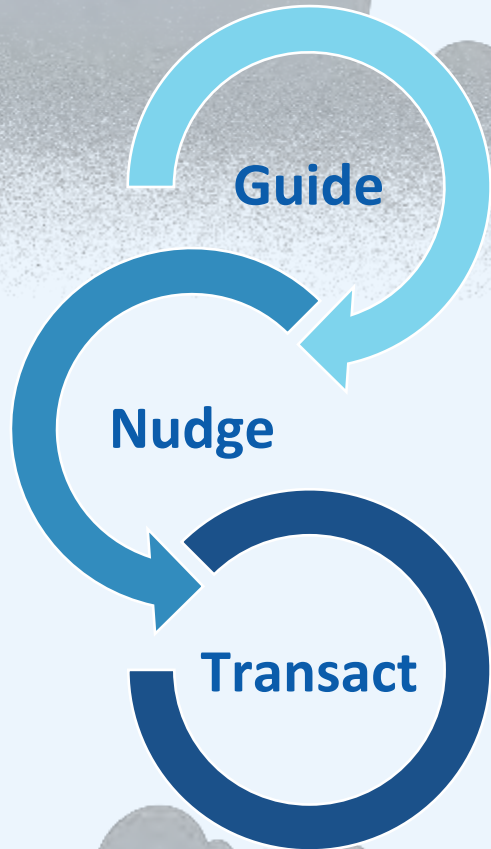


of patients expect  
their healthcare  
providers to  
send them  
**personalized**  
reminders and  
messages.

## Individualizing Engagement



# Patient Engagement Priorities



## Guide

- Curate a Digital Experience that is easy to navigate and understand
- Develop a strategy that prioritizes conversion

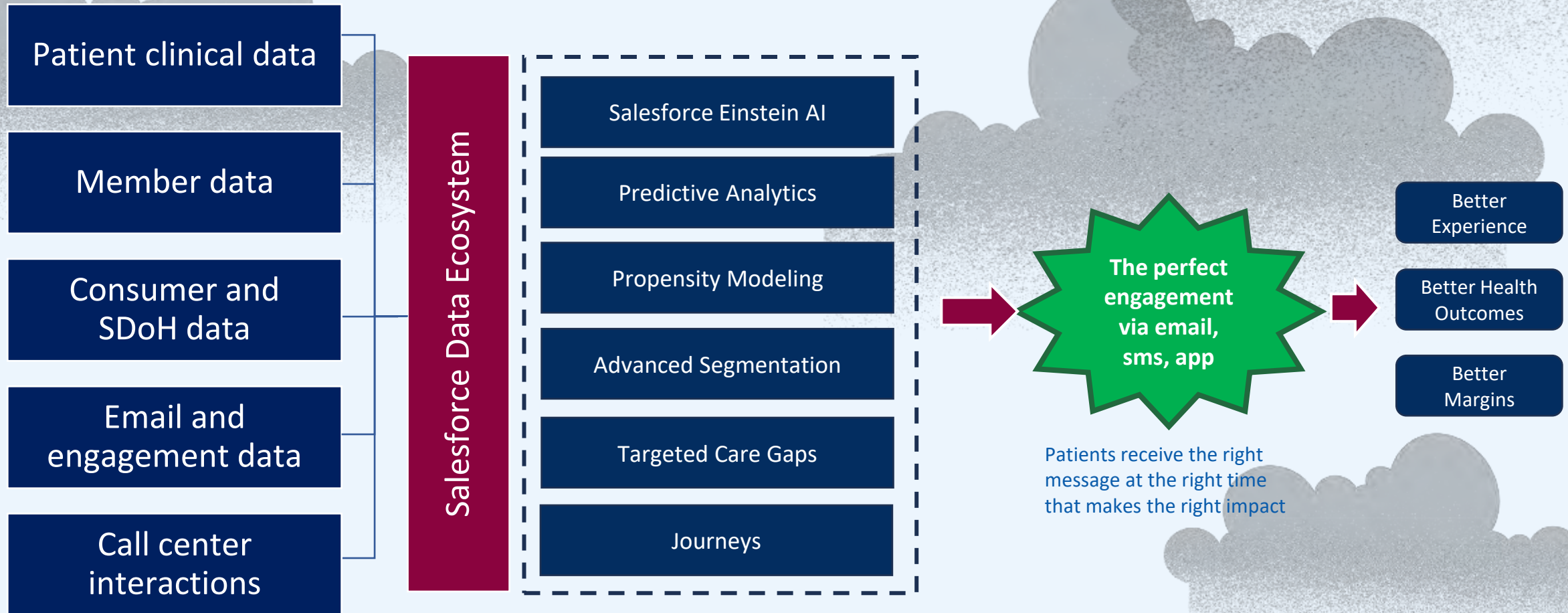
## Nudge

- Compliantly and respectfully direct patients to take action
- Remind, educate, direct, and provide easy to complete actions that will help her be her best self
- Create sticky experiences that build upon prior actions, keeping her engaged for all her health care needs

## Transact

- Remove obstacles to scheduling care
- Making health care easier so life can be better

# Data-Driven Omni-Channel Patient Engagement Platform



**AI + Data + CRM = Trusted Platform**

# AI Powering the Future Patient Engagement Platform



## Expansion of Machine Learning

- Further develop Next Best Action with more data and use cases
- Automate A/B testing

## Generative AI

- Generative AI Content creation to increase speed to market
- Identification of best performing topics, imagery, media and content

## Autonomous Gen AI

- Proactively evaluate past experiences to understand patient needs
- CREATE individually tailored content that will help patients achieve their health goals

# Financial Impact Tracking

## Welcoming Digital Front Door

**\$6.5M**  
revenue



**170k** appts  
**65k** new patient appts

**\$850k**  
savings



**170k** calls avoided

## Intelligent Contact Center

**\$9M** labor savings

**\$14M** more revenue in appointments from answering abandoned calls

**\$700k** from increased same day/next day availability – scheduling accuracy

**\$600k** more revenue by scheduling “add on” visits

## Omni Channel Patient Engagement

**\$250k** vendor reduction savings

**\$6M** revenue - no show rate reduced from 14% to 12%

**\$750k** savings- 150k calls avoided

**\$6M** revenue- appointments attributed to email

**Totals:**

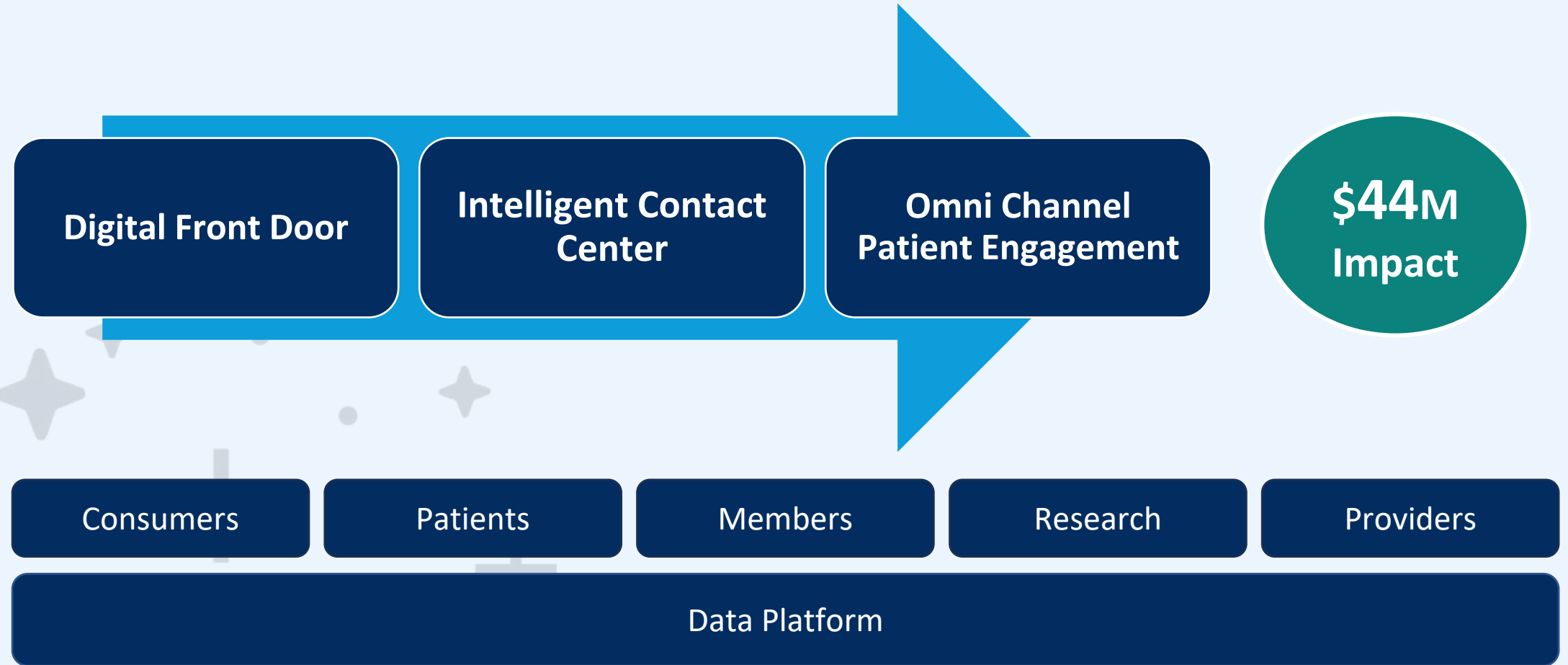
**\$33.2M**  
Revenue

**\$10.85M**  
Cost Savings

**\$44M**  
Total Impact <sup>1</sup>



# Delivering a Cohesive and Frictionless Customer Experience Results in Significant Financial Impact



Digital Front Door

Intelligent Contact Center

Omni Channel Patient Engagement

\$44M Impact

Consumers

Patients

Members

Research

Providers

Data Platform

# Banner is delivering a unified view of their patients and consumers, preparing the way for AI Adoption



The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a light blue cloud-like shape.

salesforce



**forum** FOR HEALTHCARE STRATEGISTS

# Thank You

The background features a dark blue gradient with various decorative elements: a large four-pointed star in the upper right, a cluster of small white and purple stars and plus signs in the lower left, and a few scattered plus signs and stars in the lower right.

# Work is about to change for good

Einstein Copilot augments employees, unlocking productivity

salesforce

Then

Many screens and clicks

Data silos everywhere

Manual processes

All disconnected



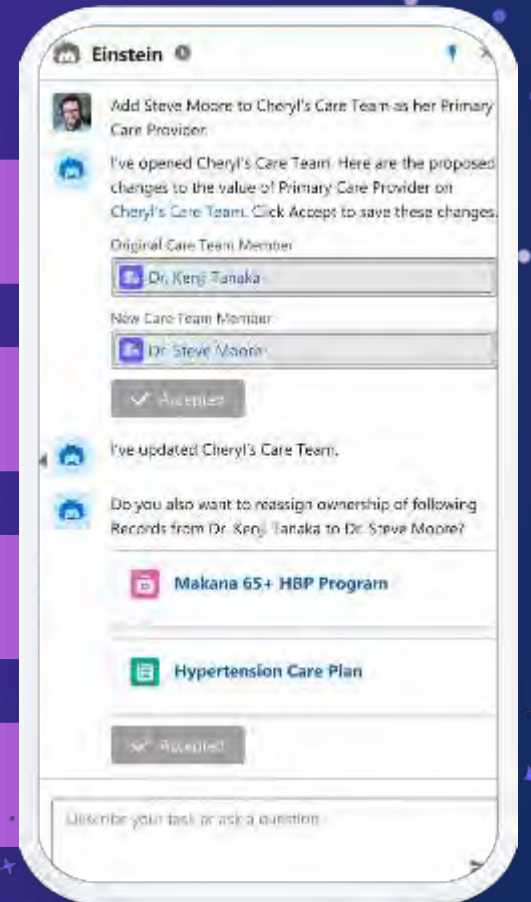
One conversational AI assistant

Grounded on unified data

That can take action

In the flow of work

Now



# 4,850 of your peers are shifting strategy in data and AI.

See how.

