



Clinical Lab CRM

Dynamics 365 Project Proposal

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Overview

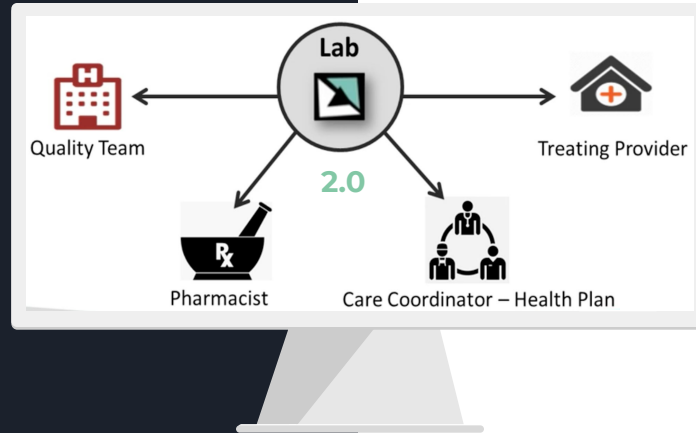
Implementing a Lab-specific CRM

- 
- Improve worker productivity and customer service
 - Cut costs and increase profitability
 - Increase accessibility of data
 - Facilitate shift from transaction-based to value-based
 - Identify trends in client service and client satisfaction in real time

Overview Clinical Lab 2.0

Lab 1.0

- Transactional
- Sample Centric
- Fee-for-Service
- Cost Per Unit
- Limited Care Coordination



Lab 2.0

- Integrative
- Patient Centric
- Bundled Pay
- Cost Per Life
- Actionable Info
- Optimization & Coordinated Care



The Problem

Outdated Business Model


- 01 Increasing budget cuts are threatening the viability of the traditional transaction-based business model.
- 02 Few labs are actively engaged in integrating laboratory diagnostics with clinical workflows & population management.
- 03 Because labs make up 2% of US healthcare spending, they are perceived as commodities rather than integrated members of the care team.



The Problem

Insurers, Physicians, Patients


- 01 It is becoming increasingly difficult to have health plans reimburse claims for lab tests in a reliable and consistent manner.
- 02 Clinical labs must, as they bill the health insurers, also collect large deductibles or out-of-pocket payments directly from those patients.
- 03 When the claim is paid by the insurer in 60 days or longer, the lab must then send a bill to the patient to collect the required deductible.



Opportunities

The Mission

- 01 To view the patient as a true customer and design a price schedule and a menu of services that fully meets or exceeds the expectations of those patients.
- 02 Serve fast, accurate, private, reasonably priced testing services to drive better outcomes for patients, providers, and financial stakeholders.
- 03 Improve worker productivity and customer service, cut costs, and increase the accessibility of their data.



“ Today’s clinical laboratory organization is rich in data, but this data does not improve client relationships unless integrated and presented in a way that allows laboratory staff to provide outstanding client service

Chairman and CEO of hcl.com
Brad Bostic





Solution

Dynamics 365

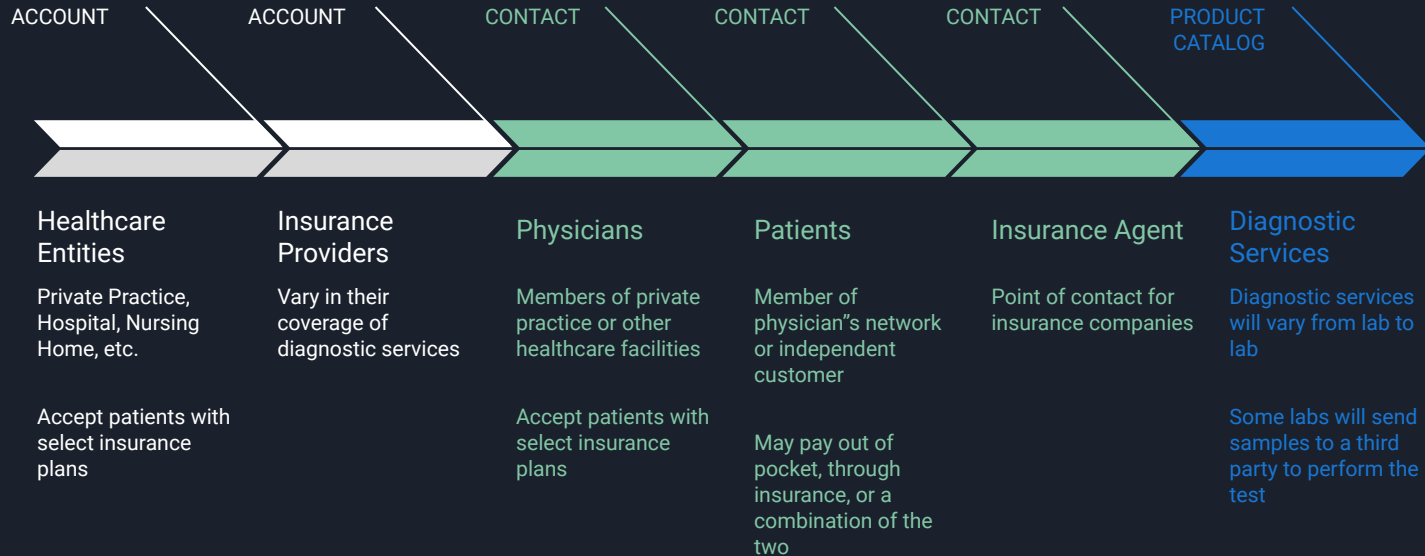
Implement a laboratory-specific CRM using Dynamics 365's set of intelligent business applications

Extend its out-of-the-box functionality to handle the more complex relationship management requirements of a clinical lab



Solution

Modeling the Entities



Solution

Sample Workflow

Patient

Patient in need of healthcare services visits a care provider

Care Provider

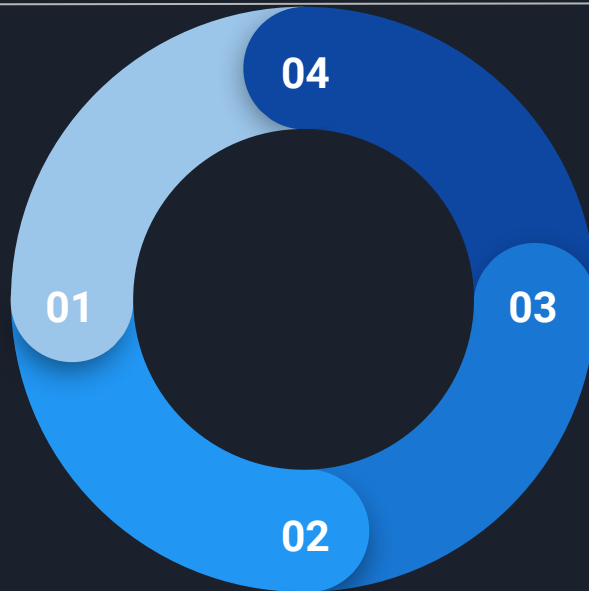
Medical specialist retrieves specimen from patient to send to lab


Insurance Provider

If applicable, billed for part or all of the diagnostic service

Clinical Lab

Performs test on the patient culture and returns result





Solution

Potential CRM Features

- Tracking relations with client physicians
- Benchmark tracking
- Track productivity
- Real-time monitoring of lab operations and workflows
- Provide financial and operation trend-analysis to key stakeholders
- A comprehensive view of all sales and customer service activities at both aggregate and provider levels
- Help sales reps gain more field time
- Centralize client information
- Track sales activities
- Properly store data
- Gain access to real-time analytics
- Enable personalized care
- Care team visualization
- Patient timeline
- TBD

Fargo Medical Laboratories

Objectives

1. Securing 60% of the physicians in the Main Street Professional Building as customers.
2. Develop 20% of their revenue from physicians who practice in the nearby vicinity.
3. Reach profitability with 12 months.

Market *Identified 2 market segments*

1. Physicians that have a practice in the Main Street Professional Building (128 potential customers with a growth rate of 3%)
2. Physicians that have medical practices in other nearby facilities (115 potential customers in this segment with a 5% annual growth rate)



Case Study 1 **A Lab Business Plan**

Fargo Medical Laboratories (cont)

Services *Comprehensive battery of in-house blood tests for physician's patients*

- Red blood cell count- \$15
- White blood cell count- \$15
- CBC - \$30
- Blood sugar - \$15

Mission

Serve local physicians with fast, accurate, private, reasonably priced blood testing services.

Fargo Medical Laboratories (cont)

Keys to Success

1. Lease space in the Main Street Professional Building, the location of our primary target market.
2. Set up a strong contract with a large local laboratory to outsource the more difficult tests, ensuring fast service and good rates.
3. Follow a strict regime of accounting controls to help ensure profitability.

Competition *Total of seven blood drawing laboratories in Fargo*

Closest competitor is Mednet, located four miles away. This is the facility that 95% of the physicians in the Main Street Professional Building currently use.

Fargo Medical Laboratories (cont)

Sales Strategy

1. Most forms of insurance accepted - *This is important because the vast number of patients that will have their blood tested will not be self-paying*
2. Quick turn-around - *A doctor's diagnosis and treatment is often based on the results of the test.*
3. Convenience - *There is no other alternative that is more convenient than sending the patients to an office within the building*

More Details

https://www.bplans.com/laboratory_business_plan/executive_summary_fc.php

Counsyl, Inc

Problem

- It is becoming ever more difficult to have health plans reimburse claims for lab tests in a reliable and consistent manner.
- Many lab companies report that they are experiencing high rates of denied claims.
- When the claim is finally paid by the insurer in 60 days or longer, the lab must then send a bill to the patient to collect the required deductible. When this happens, the clinical laboratory has two unhappy customers: the patient and the patient's physician!

Counsyl, Inc (cont)

Solution

- Prices test menu at a reasonable level, averaging about \$1,500 each. Health insurers recognize clinical benefit at an acceptable cost.
- Can bill the right health plan for just about any patient it serves.
- Offers a quick and easy-to-use patient test pricing tool.
- Patients can use the tool to determine exactly how much they will pay, based on their health insurance benefits.



Resources

Pricing Tests to Meet the Expectations of Patients

<https://www.darkdaily.com/how-smart-clinical-laboratories-and-genetic-testing-labs-are-collecting-more-revenue-by-pricing-tests-to-meet-the-expectations-of-patients-523/>

Lab-Specific CRM Helps Innovative Clinical Laboratories

<https://www.darkdaily.com/lab-specific-crm-helps-innovative-clinical-laboratories-and-pathology-groups-to-intelligently-cut-costs-while-boosting-service-to-physicians-patients-731/>

TriCore Reference Laboratories

<https://intersystems.com/resources/detail/tricore-reference-laboratories-transforms-to-the-clinical-lab-2-0-model-with-intersystems-healthshare-and-rhodes-group-software/>

More Clinical Pathology Laboratories Use Middleware for Business Intelligence and Lab-specific Customer Relationship Management

<https://www.darkdaily.com/more-clinical-pathology-laboratories-use-middleware-for-business-intelligence-and-lab-specific-customer-relationship-management-102312/#axzz2AJkX7wNp>



Resources (cont)

Laboratory Business Plan

https://www.bplans.com/laboratory_business_plan/executive_summary_fc.php

Understanding Healthcare Reimbursements

<https://www.verywellhealth.com/reimbursement-2615205>

CEO Describes Characteristics of the Clinical Lab 2.0 Model

<https://www.darkintelligencegroup.com/the-dark-report/laboratory-management/ceo-describes-characteristics-of-the-clinical-lab-2-0-model/>

Improving American Healthcare Through "Clinical Lab 2.0"

<https://journals.sagepub.com/doi/full/10.1177/2374289517701067>



Thank you

Any questions?