



## Healthcare Leader Implements New Business Model and Drives Increase in Referrals

### Overview

**Country or Region:** United States  
**Industry:** Healthcare providers—Hospitals

### Customer Profile

INTEGRIS Health is the largest healthcare organization in Oklahoma, offering a wide spectrum of advanced services to populations in the Oklahoma City urban area and regions throughout the state.

### Business Situation

After rebuilding its sales force and cutting marketing spending, the organization required technology to manage business development and ensure that sales generated the right physician referrals.

### Solution

INTEGRIS Health implemented Microsoft Dynamics CRM together with Physician Relationship Management from the Software Solutions Group.

### Benefits

- Boost referral impact and sales team accountability
- Enable representatives to succeed
- Increase manageability and control
- Drive successful strategy at executive levels

*“As healthcare adjusts to healthcare reform and moves into electronic records management, Microsoft Dynamics CRM allows us to be more competitive across the entire state.”*

*Chelsey Deakins, Marketing Representative, INTEGRIS Health*

Oklahoma’s largest healthcare provider, INTEGRIS Health, aimed to reduce costs and lend more resources to its business development. The organization cut advertising spending and focused on the physicians who provide referrals to services, rebuilding its sales force at a smaller size with seasoned account representatives. Recognizing the need for relationship management and reporting tools to manage the sales team for best results and give executives insight and control, INTEGRIS Health reviewed available solutions. INTEGRIS Health decided to deploy Microsoft Dynamics CRM integrated with Physician Relationship Management from Microsoft Gold Certified Partner, Software Solutions Group. Today, the volume and quality of referrals are increasing. Sales management effectively drives performance, and executives rely on the solution to align business development with the organizational strategy.

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Cheree Belt, Senior Marketing Representative, INTEGRIS Health

## Situation

[INTEGRIS Health](#) is the largest Oklahoma-owned, nonprofit, healthcare organization in the state of Oklahoma. INTEGRIS Health employs close to 10,000 healthcare professionals, including physicians and specialty care providers. When construction of its newest facility in the Oklahoma City area is complete, INTEGRIS Health will have four hospitals in the Oklahoma City metropolitan statistical area and eight hospitals in smaller towns across the state. The organization’s headquarters are located in Oklahoma City, with INTEGRIS Baptist Medical Center as the anchor hospital.

INTEGRIS Health performs extensive outreach to the community with free clinics and other services to ensure that people across Oklahoma, especially in underserved populations, receive needed healthcare services. As a business, INTEGRIS Health competes with a highly saturated market where several other healthcare organizations strive to win referrals from independent physicians and increase traffic to their facilities and services.

To build awareness for its offerings and resources, INTEGRIS Health spent as much as U.S.\$9 million per year on TV, print, and billboard advertising, direct mail, and events. Leadership wanted to reduce advertising costs and build a strong sales strategy to complement the existing marketing strategy. Although INTEGRIS Health staff included 42 people whose job titles included a sales function, these employees were not systematically making sales calls or managing accounts. Instead, they participated more in marketing events and had little accountability for growing revenue or physician referrals.

INTEGRIS Health decided to create an outside sales force with 22 people and give

them responsibility for working their accounts. In addition, INTEGRIS Health hoped to find the right technology tool to manage sales efforts. Chelsey Deakins, Marketing Representative at INTEGRIS Health, explains, “Within the sales group and in working with service-line directors and hospital presidents, we needed the ability to communicate effectively, provide updates and reports regarding account activities and referrals, and avoid duplicative activities and expenses. The new tool needed to be easy to use and manage.”

The IT department at INTEGRIS Health was already responsible for supporting close to 900 separate software products. INTEGRIS Health wanted to avoid adding to that complexity by asking technology users and administrators to work with yet another stand-alone solution, because adoption would likely be poor. A tracking software used for marketing purposes lacked the flexibility to accommodate sales and account activities. ACT! sales management software, while available to 30 employees, was used regularly only by a few people.

## Solution

Members of the sales team participated in defining the requirements for a technology solution together with business executives and the IT group. A review of customer relationship management software providers prompted INTEGRIS Health to consider [Microsoft Dynamics CRM](#) and an Oracle customer relationship management solution. Cheree Belt, Senior Marketing Representative at INTEGRIS Health, says, “Microsoft Dynamics CRM was able to integrate with Microsoft Outlook and offered a familiar user interface. Oracle did not offer the same level of integration. We were confident that Microsoft Dynamics CRM would find immediate acceptance within the organization and would meet all

Microsoft Dynamics CRM and Physician Relationship Management provide many ways to review representatives' activities.

our expectations for ease-of-use. It also became clear that leadership in charge of service lines and hospitals would readily be able to use the solution to review sales results and design their strategy."

Microsoft introduced INTEGRIS Health to [Software Solutions Group](#), a Microsoft Gold Certified Partner that has a successful track record in the healthcare industry with its [Physician Relationship Management](#) solution. Built to integrate with Microsoft Dynamics CRM and Microsoft Office software, Physician Relationship Management provided a number of capabilities important to INTEGRIS Health. Physician Relationship Management includes functionality to assess referrals by physician, manage community outreach to organizations along with events and attendees, and track engagements and interactions with individual physicians.

Software Solutions Group helped INTEGRIS Health deploy Microsoft Dynamics CRM together with Physician Relationship Management, performing the consulting work remotely. The implementation partner also worked with the INTEGRIS Health IT group to ensure that the solution would comply with the Healthcare Insurance Portability and Accountability Act (HIPAA)

and other regulations and reflect workflows, policies, and best practices in use at INTEGRIS Health. Says Belt, "I was one of several account executives who worked with an amazing team of technology professionals from Software Solutions Group and Microsoft. We adjusted the reporting and account management capabilities of Microsoft Dynamics CRM closely to our complex business model and the needs of a diverse user community, at the same time ensuring that the solution was highly intuitive and easy to work with."

Initially, Microsoft Dynamics CRM and Physician Relationship Management became available to the 22 members of the sales team and eight business managers. After that, close to 50 additional users also received training and access to the solution. Most people in the second group are presidents or vice presidents of hospitals and service lines who are mostly interested in reviewing how the sales team develops additional business for their facility or service. The sales organization and the IT team worked with service-line stakeholders to establish account lists to target for the many services INTEGRIS Health provides. They also added competitive detail and migrated information from ACT! software

All Activity Report						
Owner	Interaction Type	Date	Activity Type	Regarding	Description	Subject
Softwaresolutions (2)						
Crmadmin						
	Event	(2)				
		2/11/2011 3:30:00 PM	Appointment	John Cogovan	Academic Lecture with Dr Elbeshtehsy	Academic Lecture with Dr Elbeshtehsy
						John Cogovan
		2/8/2011 6:00:00 PM	Appointment	John Cogovan		AEP/Four Points Sheraton
						John Cogovan
	General Meeting	(3)				
		2/11/2011 8:30:00 AM	Appointment	CRM Polino		Approval for weight loss center lunch
						CRM Polino
		2/10/2011 1:00:00 PM	Appointment	John Cogovan	Topics discussed ranged from advertising dollars and products as well as future meetings and business lines.	Advertising Meeting for KMAD Radio
						John Cogovan
		2/9/2011 3:30:00 PM	Appointment	John Cogovan		Admissions/Marketing mtg
						John Cogovan

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“Our service-line directors and hospital presidents now enjoy an unprecedented level of insight and control.... [W]e can refocus our activities to make sure we pursue the most productive referrers.”

Chelsey Deakins, Marketing Representative, INTEGRIS Health

into the new solution. The various user groups received customized training and user guides tailored for their specific task requirements.

The account executives—19 of them in the Oklahoma City area and three supporting the regional hospitals—use Microsoft Dynamics CRM and Physician Relationship Management to plan and track their activities, document interactions and appointments with physicians, and make note of opportunities they learn about. In addition, they record feedback from physicians and the communities on INTEGRIS Health’s service quality and emerging care needs. The three regional representatives also rely on the solution to manage marketing and public-relations activities. Equipped with laptops, all sales team members are mobile, with each of them making up to 160 sales calls a month to physicians, physician extenders, case managers, and organizations. Each sales professional represents one or several service lines and will cross-sell or team with a colleague when it makes best sense for the business.

For hospital presidents and service-line directors, Microsoft Dynamics CRM and Physician Relationship Management provide the information and insight to collaborate with account executives regarding objectives and performance. Currently, sales team members also use the solution to provide sales reporting, competitive insight, and visibility of opportunities to INTEGRIS Health managers and executives. However, a growing number of stakeholders access the solution to review activities and results related to their own facility or service line. INTEGRIS Health is continuing to integrate Microsoft Dynamics CRM and Physician Relationship Management closely into the business infrastructure. This effort includes

connecting electronic patient records management and invoicing systems. “The solution is very flexible,” says Belt. “For the IT group, it’s very easy to maintain interoperability with our other software systems.”

## Benefits

By combining the new sales strategy with the existing marketing strategy, INTEGRIS Health generates positive results in terms of increasing referrals and higher levels of managerial control and executive insight. Says Deakins, “As healthcare adjusts to healthcare reform and moves into electronic records management, Microsoft Dynamics CRM allows us to be more competitive across the entire state.”

### **Boost Referral Impact and Sales Team Accountability**

Rebuilding the sales organization with a smaller, highly skilled team, reducing marketing spending, and making a small investment in a customer relationship management solution has enabled INTEGRIS Health to reduce operational costs and bring accountability to the sales team. With renewed focus, the sales team is making the impact the organization hoped for. “We are now able to find many more potential and unknown referral sources to expand our service delivery. We have already seen increases in transfers from external hospital systems and physician referrals to our imaging services, women’s health services, transplant services, advanced cardiac care, and other areas,” says Belt. “We also hear from hospitals and line-of-service managers that they have experienced increased traffic. Clearly, with the assistance of Microsoft Dynamics CRM and Physician Relationship Management, we can claim a larger share of Oklahoma’s healthcare market.”

### **Enable Representatives to Succeed**

For INTEGRIS Health sales professionals, Microsoft Dynamics CRM and Physician Relationship Management have become an essential business tool that helps them structure their day and work for best results. Sales representatives efficiently log their activities and results, make note of physicians' concerns, and ensure that sales opportunities receive the right level of attention. Regular updates regarding account interactions take minimal time and let representatives focus on making every call count. That also entails streamlined communications among representatives, who can easily coordinate account activities for efficiency and best results. Says Deakins, "We're one of only about 30 healthcare providers in the country and the only one in Oklahoma to have a large, professional sales force. Our use of best-in-class technology helps us build an even stronger distinction and maintain a strong presence with the physicians and organizations that make referrals to our services."

### **Increase Manageability and Control**

With the reporting and analytical tools in Microsoft Dynamics CRM and Physician Relationship Management, INTEGRIS Health service-line directors can assess the performance of their sales representatives. Armed with that insight, they can suggest changes in the approaches representatives take and help them engage with physicians and other potential referral sources to benefit everybody involved. "We have monthly review meetings with the service-line directors to discuss our activities and refine our approach," explains Belt. "The technology makes it very easy for me to document how I use my time, discuss feedback from physicians and accounts, analyze referral patterns, and assess traffic coming to INTEGRIS Health in that month or at an earlier time. Collaborating with the

service-line manager, I can easily adjust my account strategy in a timely manner."

### **Drive Successful Strategy at Executive Levels**

By accessing data and reports in Microsoft Dynamics CRM, the sales organization provides INTEGRIS Health executives with sales performance insight that they can apply strategically, for example, in determining whether the organization is growing or holding its own even during economic downturns. Executives also can correlate sales reporting with service-line revenue coming from the service organizations and with statistics related to admissions and procedures. INTEGRIS Health executives responsible for service lines or hospitals can review this information and determine whether the sales effort is producing the results they need. "Our service-line directors and hospital presidents now enjoy an unprecedented level of insight and control," Deakins comments. "They can tell me, for example, what they are looking for from me and the sales team so that we can align our efforts with their overall strategy. That also means we can refocus our activities to make sure we pursue the most productive referrers."

### **Additional Resources**

- [Read about Microsoft Dynamics CRM for healthcare providers](#)
- [Watch videos and read case studies with success stories of Microsoft Dynamics CRM customers](#)
- [Visit Microsoft Dynamics CRM communities and blogs](#)
- [Learn more about Physician Relationship Management from Software Solutions Group](#)

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

[www.microsoft.com](http://www.microsoft.com)

For more information about Software Solutions Group products and services, call (877) 330-3368 x118 or visit the website at:

[www.softsolgrp.com/prm](http://www.softsolgrp.com/prm)

For more information about INTEGRIS Health services, call (405) 951-2277 or visit the website at:

[www.integrisk.com](http://www.integrisk.com)

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

### Software and Services

- Microsoft Dynamics
  - Microsoft Dynamics CRM
- Microsoft Office
  - Microsoft Outlook

### Partners

- Software Solutions Group