



Smart Outreach, Better Outcomes

How AdventHealth & Upfront Healthcare
Close Care Gaps with Personalized
Patient Communications



CARRIE KOZLOWSKI

Co-Founder & COO
Upfront by Health Catalyst

STACY CALHOUN

Director of Communications
AdventHealth's Population
Health Services Organization





About AdventHealth's Population Health Services Organization



6000+ Providers



Located in Florida



Committed to achieving positive health outcomes by delivering whole person care for its members' value-based care models



Disconnected Patients, Delayed Care, and the Cost of Inaction

ADVENTHEALTH FACED CHALLENGES ACTIVATING PATIENTS TO CARE

- Post-pandemic, preventive screenings declined – particularly among healthy but disengaged patients
- One-size-fits-all outreach fell flat: emails ignored, calls unanswered, care gaps widened
- Barriers like distrust in insurers, confusing access points, and fragmented communication worsened disparities

GOALS

- Activate the “in-between” patients – relatively healthy but overdue
- Do more with fewer clinical resources
- Build trust & improve health equity

Audience Poll

Which of these challenges resonates most?

- A** Declining preventive screening rates (VBC Metrics)
- B** Identifying & addressing barriers to care (SDOH)
- C** Disengaged patients
- D** Differentiating in our competitive market

PSYCHOGRAPHICS

An Established Science

WHAT IS IT?

Psychographics **go beyond demographics** to understand subconscious or conscious beliefs, motivations and priorities to explain and predict consumer behavior. It is the product of **nature & nurture** and the aggregate of a person's experiences. It explains **why** people do what they do.

BACKGROUND

Developed in the 1970's, psychographics has been used extensively in consumer-focused industries to design products, advertising, promotion and user experience.

This proven methodology has been sharpened and successfully applied by companies like Walmart, Geico, Procter & Gamble and more. But, it's still relatively new to healthcare.



DEMOGRAPHICS

AGE:

44

GENDER:

Female

LOCATION:

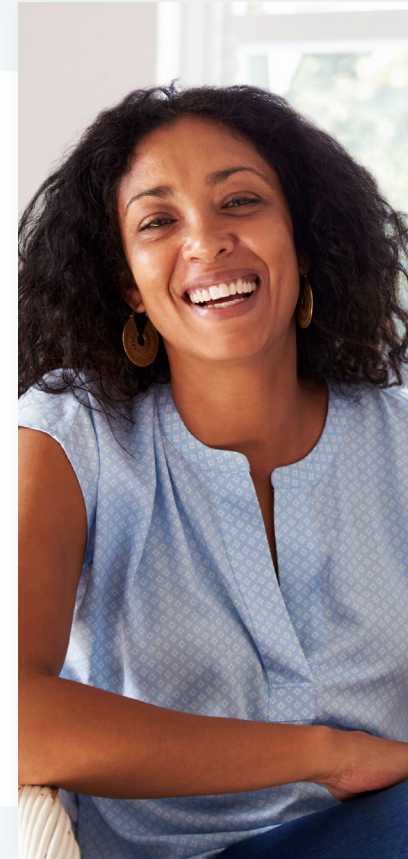
Chicago

PROFESSION:

Project Manager

SALARY:

\$90k



PSYCHOGRAPHICS

BELIEFS:

"Doctor knows best"

VALUES:

**Charitable; look good -
feel good; health = life**

MOTIVATION:

**Goals, measures,
progress**

ATTITUDES:

**Sympathy, outgoing,
conceptual, creative,
get it right**

PSYCHOGRAPHIC SEGMENTATION

Introducing Upfront's Proprietary and Equitable 5 Segment Approach to Personalization



SELF ACHIEVER

23% of population

- Motivated by goals, measures, progress
- Likes to have a plan
- Respects the physician



BALANCE SEEKER

15% of population

- Wants options and choices in their health journey
- Likes to discover new and interesting solutions



PRIORITY JUGGLER

12% of population

- Puts personal wellbeing behind their obligations to family and work



TRUSTFUL RESPONDER

15% of population

- Needs clear and concise guidance from a credentialed source



WILLFUL ENDURER

35% of population

- Lives in the 'here and now' and wants immediate gratification
- Convenience, ease and simplicity is key

PROACTIVE, ENGAGED

REACTIVE, DISENGAGED

EXPERIENCE MATTERS

Each Segment Requires a Unique Activation Strategy

USE CASE EXAMPLE

It's time to schedule your annual flu shot.

Automated outreach by psychographic segmentation typically improves engagement metrics by 20%

(and sometimes as much as 300%)



SELF ACHIEVER

Achieve the goal; improvement



BALANCE SEEKER

Choices, options, knowledge and context



PRIORITY JUGGLER

How family & others benefit; commitment



TRUSTFUL RESPONDER

Expert; credentialed physician says so



WILLFUL ENDURER

Here & now; live for today; the first step is easy

THE PATIENT EXPERIENCE

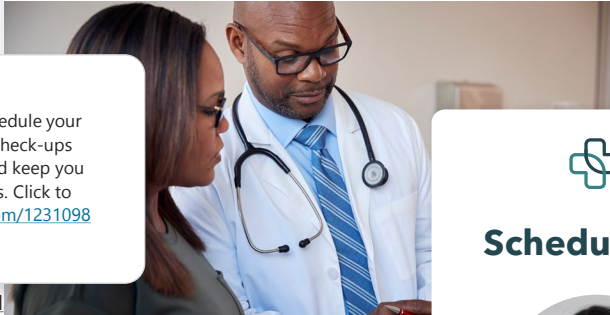

Powerful personalization with the data health systems already have

BEHAVIORS & BARRIERS

| | |
|-------------------|------------------|
| Desired Action | Prior Engagement |
| Language | Portal User |
| Diagnosis | Visit Adherence |
| Prior Utilization | Barriers |
| Payer | Transportation |
| Services | Financial Status |
| Access | Location |

MOTIVATION & PREFERENCES

| | |
|----------------|--------------------|
| Psychographics | Messaging |
| Channel | Timing & Frequency |
| Imagery | Content Strategy |



FeelWell

Hi Angela. It's time to schedule your annual physical. Regular check-ups help catch issues early and keep you informed of your progress. Click to schedule: www.feelwell.com/1231098


Reply STOP to opt out.

M
Re
3
we
OL


Angela, protect your health with your annual physical! During this appointment, you'll work with Dr. Parker to assess your whole-body health and build your plan for long-term wellness. Make sure you have what you need to stay healthy.

Schedule your visit

I have concerns about getting to my appointment



Schedule your visit



Dr. Wendy Parker
Internal Medicine

Chicago Health Clinic
500 W. Madison St
Chicago, IL 60661

Available times:

August 13

10:30 am

11:30 am

4:15 pm

August 14

11:00 am

11:30 am

12:00 pm

EXAMPLE OUTREACH

Mammogram Care Gap

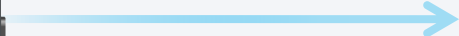


Angela, 41

- Language:** English
- Psychographic Segment:** Self-Achiever
- Barriers:** None



FeelWell
You're due for a mammogram, an important preventive screening that can detect cancer early, when it's easier to treat. Protect your health by making an appointment with FeelWell now: www.feelwell.com/1231098
Reply STOP to opt out.



Mary, 47

- Language:** English
- Psychographic Segment:** Trustful Responder
- Barriers:** Unknown



FeelWell
It's time to schedule your mammogram!
Hi Mary! Dr. Parker recommends you schedule your routine mammogram. This critical screening improves the chance of early detection and ensures you get the best...



Audience Poll

How are you personalizing patient outreach today?

Select all that apply.

- A** Including a patient's name
- B** Using demographic information (gender, age, location, etc.)
- C** Selecting channels based on patient preferences
- D** Sending information relevant to a patient's medical history



Activating AdventHealth Patients to Care

A 4-pronged, consumer science-backed strategy to meet every patient where they are, at scale:



Psychographic Targeting

Using robust patient data and validated consumer science to craft personalized messages that resonate



Behavioral Orchestration

Combining claims, SDOH and engagement signals to time messages perfectly



Omnichannel Strategy

Email, SMS and portal prompts; direct-dial options



Frictionless Conversion

No portal log-ins, no long forms - just "click to schedule" simplicity

Personalization Performs...

Diabetes

- 45K+ Patients Outreached
- **51%** Open Rate

Annual Physicals

- 54K+ Patients Outreached
- **54%** Open Rate
- **3.4%** Response Rate

Mammogram

- 51K Patients Outreached
- **48%** Open Rate
- **5%** Response Rate

INDUSTRY BENCHMARKS

37% Open Rate

1.75% Digital Conversion Rate

... Beyond Vanity Metrics

Diabetes

- 45K+ Patients Outreached
- 51% Open Rate

36% Closed Care Gap
within 90 Days

Annual Physicals

- 54K+ Patients Outreached
- 54% Open Rate
- 3.4% Response Rate

41% Closed Care Gap
within 90 Days

Mammogram

- 51K Patients Outreached
- 48% Open Rate
- 5% Response Rate

23% Closed Care Gap
within 90 Days

INDUSTRY BENCHMARKS

37% Open Rate

1.75% Digital Conversion Rate

ADDITIONAL IMPACT



No Lift on Care Team



Better Experience Leads to Higher Patient Trust and Long-Term Loyalty



Support the network providers to allow time with patients who need more attention



Lessons Learned from a Journey of Change

BEHIND THE RESULTS

- Started with email-only outreach
- Over time, expanded to SMS, direct dial, and continuous campaigns
- Eventually transformed into quarterly automated, always-on outreach with layered strategies and a weekly ED Diversion campaign
- Tackled care gaps first, added a quarterly ED diversion campaign and have now evolved to a weekly ED diversion campaign to recent utilizers

KEY TAKEAWAYS

- Build internal confidence with early wins
- Keep clinical lift low
- Partner with a team that respects your pace, but nudges you forward
- Owning outreach (provider network vs insurer) reinforces brand trust



How We Evolve From Here



Targeted intervention layering

Targeted intervention layering for specific populations (e.g. layering diabetes intervention offers for segmented cohorts)



Continuing to improve campaigns using SDOH data

Fine-tuning outreach by language needs



Channel expansion

Exploring outbound voice with callback functionality to boost PCP visits

Audience Poll

What's preventing your organization from investing more in patient experience?

- A** Cross-functional alignment & buy-in
- B** Resource constraints
- C** Tech stack
- D** Budget

Questions?

Carrie Kozlowski

COO and Co-Founder of Upfront by Health Catalyst

Stacy Calhoun

Director of Communications

AdventHealth's Population Health Services Organization

For questions or to talk to an expert:
hcwebinars@healthcatalyst.com