



WOLL®

THE DEFINITIVE BUYER'S GUIDE TO A PATIENT COMMUNICATION PLATFORM

A guide for healthcare IT leaders on how to choose a patient communication platform that's right for you

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HOW TO USE THIS GUIDE

In The Definitive Buyer's Guide to a Patient Communication Platform, we break the evaluation process down into six steps and lead you through each one, complete with helpful worksheets. When you reach the end of the guide, our goal is for you to:

- Define your organization's business needs
- Identify what features your health system needs most
- Gain support from key stakeholders in your organization
- Decide on your top vendor choices

The goal of this guide is to assist you in the process of choosing a unified patient communication platform that supports your company's goals. It will help you to gain clarity and insight into your patient communication needs so that you can ask the right questions when evaluating vendors. Start at the beginning and work your way through each step or choose the most relevant steps for your organization. Using this guide will increase the odds that you will make the right vendor selection.



Remember to look for this symbol to know which pages to print.

WORKSHEETS

Worksheets are included in the guide to help you determine your specific needs by asking you thoughtful questions. Some worksheets provide specific scoring. We suggest that each stakeholder fill out the worksheets and compare answers with those involved in the decision process to drive consensus.



UNLEASHING THE POWER OF DIGITAL PATIENT COMMUNICATIONS

The expectations for streamlined, consistent patient communications have never been higher as healthcare becomes more patient-centric, digitally connected, and outcomes-driven. For healthcare systems, engaging patients throughout the patient journey with technology that patients use in their everyday lives is key to better patient outcomes, higher revenue, lower costs, and other benefits.

Patients now expect access, convenience, and even self-service. Data from Accenture shows 51 percent of patients would switch healthcare providers for great customer service¹ and more than half of patients expect digital capabilities from their healthcare provider.² Health system IT leaders are constantly assessing where to focus their resources. This is equally true when it comes to which unified patient communication platform to buy.

¹ Collier, Matthew and Leslie Meyer Basham. (2016). Patient loyalty: It's up for grabs. Accenture

² Kalls, Brian and Safavi, Kaveh. (2019). Today's Consumers Reveal the Future of Healthcare. Accenture

STEP 1

OUTLINE WHY YOU NEED A PATIENT COMMUNICATION PLATFORM

As patients continue to have more options for their healthcare providers, providing a patient experience that allows your organization to stand out is essential to remaining competitive. Patients of all ages have adopted technology across different facets of their lives and have begun to expect more flexible ways to connect with their providers. They want more than robo dialers and one-way email and text systems. Patients want interactive conversations, and the convenience and efficiency of choosing their preferred channel of communication, such as text, phone, or email.

Key benefits of a patient communication platform:

- Improved patient satisfaction and outcomes
- Extended reach of key tools like the patient portal
- Increased staff efficiency
- Lower clinician and staff burnout
- Reduced no-shows and costs
- Decreased call volume
- Improved slot utilization
- Increased referral conversion

CRITERIA FOR SELECTING A PATIENT COMMUNICATION PLATFORM

Identifying your organization's problems, use cases, and goals is the first step in determining which existing product(s) works best for your organization. Thinking through all the details in advance is the best way to set up your project and health system for success. Remember you are looking for the right combination of features that will address your organization's current needs, resolve key stakeholders' concerns, support your long-term goals, and manage future challenges.

OVERALL GOALS

First, determine your business requirements and overall goals for acquiring a new solution. Since you are considering patient communication platforms, you must have some challenges and issues that you want to solve. Next, think about which departments will be using the solution and how it will fit into their operational processes. This should lead you into identifying your specific needs.

IDENTIFY SPECIFIC NEEDS

Now you can identify your "must-have" features and what features are "nice to haves." It may be helpful to start by listing the top three use cases you are looking to deploy first and why you need

them. Next, list other use cases you want to solve and any specific capabilities that you need. Once you have this list, think about how the solution needs to integrate into your current tech stack.

INTEGRATION WITH YOUR TECH

Most software platforms will need to integrate with your other tools, so make sure the companies you vet can support and execute the integration. Don't be shy in asking vendors about the depth of their experience. Think about how the solution fits into your broader technology portfolio strategy. Something else you may want to consider is how many communication solutions you are currently using and whether they can be consolidated into one unified platform.

YOUR TIMELINE

Implementing a purchased solution typically takes three to six months. Determine a timeline for when you need your solution or a deadline for delivery.



WORKSHEET A - CRITERIA TO CONSIDER

Answering these questions will help you focus on what you need in a patient communication platform. It is recommended that all decision makers fill out this worksheet and compare answers to ensure the group is aligned on your organization's needs.

▶ OVERALL GOALS

What are your ultimate goals for a patient communication platform?

List your business requirements.

List the top challenges you want to address first.

List all the departments where the solution will be used and how the solution will fit into each department's business processes.

▶ IDENTIFY SPECIFIC NEEDS

Check off the features that you need and want on Worksheet B - Features to Consider. List additional features that are not on the worksheet here.

List any specific capabilities that you need.

What use cases are you hoping to solve? See Worksheet C - Use Cases to Consider. List below your top 3 use case needs and why these are your priorities.



▶ INTEGRATION WITH YOUR TECH

How does the technology fit into your broader technology portfolio strategy?

How many communication solutions are you using today, and can they be consolidated into one unified platform?

What integrations will be required?

▶ YOUR TIMELINE

What date do you need your solution?

What is your timeline in terms of when you need the project to kick-off, implementation to start, and any other specific milestones?



WORKSHEET B - FEATURES TO CONSIDER

Here is a list of features that most healthcare systems require. Later, when you evaluate vendors, you will come back to this worksheet to score which vendors offer the features you need.

CHECK THE ONES THAT APPLY TO YOU:

SCORE EACH VENDOR: NO = 1 SOMEWHAT = 2 YES = 3

NICE TO HAVE		NECESSARY		VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
<input type="checkbox"/>	<input type="checkbox"/>	Automated Outreach Triggers - Appointment reminders, confirmation requests, recalls, referral workflows, follow-ups, thank you messages.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Provider to Patient One-Way Texting - Refers to sending text messages without the ability to receive replies. One-way works best for sending simple updates and notifications.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Provider to Patient Two-Way Texting - Bidirectional text messaging allows healthcare providers and patients to communicate back and forth as needed using more than simple y/n or numbered responses.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Templated Responses - Pre-written responses can be created and managed directly by staff. These responses can be shared at different levels across the organization or specific departments to ensure consistency in messaging.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Dynamic Message Personalization - Message templates can be built with placeholders to populate patient-specific information. Once the message is sent, the data dynamically populates with each patient's information.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Inbound Keyword Triggers - Inbound words or phrases can be set to automatically trigger a response to the patient or an alert to a user or user group.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Broadcast Messaging - Providers can send a customized message to a large group (1000+) of patients. Useful for slot utilization, office closures, or clinician unavailability.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Campaign Messaging - Bulk outreach to a targeted list of patients to communicate new services or address care gaps, such as flu shot reminders.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Secure Messaging - HIPAA compliant messaging to protect clinical content. Messages are secured and require patients to verify their identity prior to viewing the content of their messages.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Conversation Templates - A pre-populated content library with templates for conversation flows that can be quickly updated and deployed using a self-service builder.		3		
<input type="checkbox"/>	<input type="checkbox"/>	Internal Messaging/Mentions - Internal messaging streamlines collaboration between staff members and across teams, allowing the inclusion of all relevant users in the conversation on one platform and ensuring action items make it into the hands of the correct people. Notifications of an internal message can be sent to the appropriate users via text or email.		3		

CONTINUED ON NEXT PAGE



WORKSHEET C - USE CASES TO CONSIDER

Here is a list of use cases that most healthcare systems plan to improve with patient communication technology. (Note: Certain capabilities are dependent on EHR functionality). Later, when you evaluate vendors, you will come back to this worksheet to score which vendors offer the use cases you need.

CHECK THE ONES THAT APPLY TO YOU:

SCORE EACH VENDOR: NO = 1 SOMEWHAT = 2 YES = 3

NICE TO HAVE NECESSARY

		VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
Appointment administration and management				
<input type="checkbox"/>	<input type="checkbox"/>	Appointment reminders and confirmations	3	
<input type="checkbox"/>	<input type="checkbox"/>	Appointment changes and updates initiated by the provider	3	
<input type="checkbox"/>	<input type="checkbox"/>	Appointment rescheduling	3	
<input type="checkbox"/>	<input type="checkbox"/>	Patient satisfaction surveys	3	
Patient relationship management				
<input type="checkbox"/>	<input type="checkbox"/>	Recalls	3	
<input type="checkbox"/>	<input type="checkbox"/>	Follow-ups (e.g. prescription refills)	3	
<input type="checkbox"/>	<input type="checkbox"/>	Referrals	3	
Point-of-care administration				
<input type="checkbox"/>	<input type="checkbox"/>	Day-of visit communications	3	
<input type="checkbox"/>	<input type="checkbox"/>	Telehealth set-up and access	3	
<input type="checkbox"/>	<input type="checkbox"/>	Virtual waiting room	3	
Peri-procedure administration				
<input type="checkbox"/>	<input type="checkbox"/>	Pre-procedure instructions	3	

CONTINUED ON NEXT PAGE

STEP 2

IDENTIFY KEY STAKEHOLDERS, DECISION-MAKERS, AND THEIR CONCERNS

Patient communication can be used to provide improvements for many departments and employees in a health system, so it's important to determine who will be most impacted. You will also need to consider what concerns key stakeholders and decision-makers will have about adopting a patient communication platform. While these people may not necessarily be involved in the purchasing process, the software will ultimately affect them or their departments. Most likely, this group will also include various executives from your health system who need to approve new software, so understanding and addressing their questions and concerns can provide necessary important information as you evaluate products.

Demonstrating that you have done your due diligence on how a patient communication platform will operationally and financially benefit and affect your health system will allow you to make a strong business case for when you ultimately decide to purchase one.

This step is about gathering the information and getting feedback from senior management on their expectations for this new technology. Your goal here is to be proactive in preventing objections or roadblocks that might otherwise appear further down the buying process.

KEY STAKEHOLDER CONCERNS

CIO:

Cost, ROI, compliance, adoptability, team buy-in

IT:

Reports to CIO; software set-up, integration, maintenance, data security, use of their personnel

PATIENT EXPERIENCE:

Ease of use, innovative technology

DIGITAL HEALTH EXPERIENCE:

Interfacing with legacy software, new processes



WORKSHEET D - YOUR KEY STAKEHOLDERS AND DECISION-MAKERS

List your key stakeholders and their concerns that need to be addressed. Later, when you evaluate vendors, you will come back to this worksheet to score which vendors address your personnel's concerns. Total up each column at the bottom.

SCORE EACH VENDOR: NO = 1 SOMEWHAT = 2 YES = 3

Note: Here are just some ways WELL addresses key stakeholders' concerns. WELL sales can provide more info.

	VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
CIO: _____	WELL has an intuitive user interface for staff to easily view, escalate, and address individual patients' conversations. WELL also saves staff time when patients respond through capabilities including quick response templates and inbound message automations.		
IT: _____	Ease of access is increased by WELL's ability to integrate with a health system's ADFS authentication system. WELL is the sole manager of all database-related activities, including data integrity, updates, and routine maintenance.		
Patient Experience: _____	WELL is a fully-integrated solution for patient communication that enables health systems to engage with patients according to their preferences for call, text, and email.		
Digital Health Experience: _____	The WELL platform is built for flexibility and can be deployed across a wide number of use cases. WELL also has an integration-first philosophy to allow you to make the most of your existing health IT investments.		
Other Key Stakeholders: _____			
VENDOR TOTALS			

STEP 3

RESEARCH VENDORS

Next, it's time to determine which vendors have the features that fit your buying criteria. There are many vendors in the patient communications space, so one way to target the best solutions in the marketplace is to consider a vendor's KLAS rating (see sidebar on p. 16) and how it is trending. A KLAS rating should not be the sole consideration, but rather one proof point. Another way to identify highly rated solutions is to ask colleagues for recommendations.

Keep in mind that initial online research will provide you with high-level information on each vendor's features. In order to dive deeper into the capabilities of a solution, you will need to talk to a sales representative.

Keep this in mind as you start identifying potential vendors:

1. How many vendor companies will the team evaluate?

When it comes to vetting vendors, sometimes less is more. Best practices for vendor selection often include vetting three vendors to better understand options and pricing. Of course, you can expand your process to include more companies, but the more companies involved, the more time, resources, and energy will be required from you and your team in the process. Many healthcare CIOs/IT Leaders look at the top three vendors in the KLAS rankings for the relevant category (in this case, Patient Outreach). Current vendor ratings and data can be accessed at [klasresearch.com](https://www.klasresearch.com) under “Best in KLAS Rankings.” Another suggestion is to ask colleagues for recommendations through professional affiliations such as CHIME, AMDIS, or HIMSS.

2. Will you issue an RFP (request for proposal) to multiple vendors?

Developing and issuing an RFP is an exercise to help define exactly what your organization needs, how success will be measured, preferred timing, and budget ranges. An RFP helps teams compare vendors fairly to one another in an “apples-to-apples” approach. Using a structured process like this can help ensure consistency and that the pricing quoted by each vendor is comparable to the services offered.

BEST IN KLAS

KLAS is a third-party, healthcare IT research company that provides ratings based on unfiltered feedback from real customers who purchase, implement, and use the technology in question. The KLAS report rates vendors on their ability to keep promises, product reliability, customer service, and more. These reports are available at [klasresearch.com](https://www.klasresearch.com) under “Best in KLAS Rankings” and are updated annually.



WORKSHEET E - RESEARCH VENDORS

This worksheet will help you determine the internal personnel and processes you will use to vet potential vendors, and identify those you are interested in evaluating.

After identifying the top vendors that you are interested in vetting, add their names to **Worksheets: B, C, D, F, G, H, I, J.** If you are vetting more vendors, print out additional worksheets.

As you talk to vendors and get answers to the worksheet questions, rate each vendor according to the scoring system.

At the end of this process, you will add up the totals for each vendor on Worksheet K to see if there is a vendor that is clearly your first choice.

Who will manage the process with potential vendors?

Will you use an RFP (request for proposal)?

How many vendor companies will the team evaluate?

List at least 3 vendors that you are interested in and why (KLAS ranking, recommendation, good reputation etc.)

NOTES:

VENDOR VIABILITY & PROVEN SUCCESS

Next, ask the following about each vendor and/or platform you are considering:

Does the vendor have a deep understanding and experience with complex healthcare systems? Who are the vendor's customers and are they similar to your organization? Research if the platform is being used by many healthcare organizations similar to yours to get an “apples to apples” comparison of whether the vendor is capable of servicing your organization. Check if the vendor's customers are a significant number of reputable healthcare organizations across the U.S., or only a few healthcare organizations in a specific market, or if the vendor is only serving a specific patient population.

How long has this platform been in use?

There is a difference between a solution that is six months old and another with several years of history and learning behind it.

Does the vendor have a positive reputation in healthcare? Is the vendor financially sound and do they have a verifiable track record?

Research how customers rate the vendor and the solution and whether the vendor has earned recognition for being innovative, customer-focused, secure, ethical, providing a positive work environment, and any other values that are important to you.

Did the vendor company develop the solution?

A company that developed the solution itself knows the ins and outs of the solution and is typically well positioned to support and enhance it. If the solution was acquired and is one of many products in a vendor's portfolio, they may no longer have the staff experts to truly troubleshoot and maintain the product. Depending on the core business and capacity of the white label vendor, purchasing from them instead of from a vendor who is the producer of the product can limit your flexibility for customization, scalability, and upgrades.

What is the vendor's history of partnering with customers to deliver what is best for them?

Vendors who are more willing to partner and are experienced in partnering are often more agile and flexible for your needs. You may be able to assess this based on the vendor's actions during COVID-19 - did they step up and innovate working with their customers or hunker down to wait out the pandemic?



WORKSHEET F - VENDOR VIABILITY & PROVEN SUCCESS

Answer the questions and score each vendor. Total up each column at the bottom.

SCORE EACH VENDOR: NO = 1 SOMEWHAT = 2 YES = 3

	VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
<i>Does the vendor have experience with health systems similar to yours?</i>	3		
<i>Is the vendor financially sound?</i>	3		
<i>How long has the vendor been in business?</i> 1 = 1-2 years 2 = 3-5 years 3 = over 5 years	3		
<i>Does the vendor have a good reputation and track record in healthcare?</i>	3		
<i>Did the vendor develop the solution?</i>	3		
<i>If no, who was it acquired from? Does that company have a good track record with patient communication technology?</i>	3		
<i>Does the vendor have any partnerships with reputable EHR systems?</i>	3		
<i>Can the vendor provide you with customer references?</i>	3		
<i>List references here</i>			
VENDOR TOTALS	24		

TECHNICAL COMPETENCY AND CAPABILITIES

It is crucial that the vendor you choose to implement your patient communication platform has personnel with the technical competency and capabilities to integrate with your existing systems. Important considerations include integration capabilities and the expertise of the integration team.

What is the vendor's integration philosophy (API, FHIR, HL7, Flat File)?

The ideal vendor can handle multiple integration types and will recommend solutions based on the unique circumstances and needs of your company. Be skeptical if a vendor claims only API integrations will always suffice and does not also mention healthcare data standard-based mechanisms, or other sources.

Is the vendor's integration team in-house or outsourced?

If the vendor's team is outsourced, this can add delays and complicate accountability. A vendor with an in-house team is more likely to deliver on time and with less friction.

What does the vendor's integration team look like?

When implementing integrations, it's important for the vendor and customer to communicate their common goals for successful outcomes with people, tools, and processes. Make sure the vendor's integration team is transparent with how they work, whether they can use your tools, and if they can provide enough people to service your needs.

What is the work experience of the vendor's team members?

Does the integration team have enterprise EHR experience? Do engineers and product managers have a singular focus on developing communication infrastructure? Given the importance of integration with the EHR, engineers with specific EHR experience will understand the technical nuances of the software that serves as the cornerstone of the hospital tech stack.

Can the vendor measure reliability and uptime?

An application can be up but too slow to realistically use. Many people use these two terms interchangeably but they are quite different. Ask your vendor if they can easily achieve high uptimes with high availability and if they are measured separately.

What reporting is in place for outages?

Small vendors may not have any reliable escalation tools in place for outages. Credible vendors can provide detailed plans for managing multiple feeds and outages.

What are the vendor's data handling and collection policies?

Ask the vendor how they use your data and if you cancel the service, how is your data handled? For example, will the vendor return or destroy the data if you request that they do so?

How flexible is the vendor offering?

Do they offer integration and platform configuration capabilities that will allow you to innovate and extend custom workflows?

How easy is the solution to use?

Is the interface intuitive? Ask if the vendor offers pre-built, validated templates, which will enable you to turn on new workflows quickly. If the templates are user-friendly, even non-experts can execute them. To avoid wait times, check if the vendor allows you to edit and customize the solution without engaging them.

How does the vendor set your team up for success in the long term?

What does the training process look like? Check if the vendor provides ongoing training or any knowledge resources, such as a use case library or knowledge base after your initial go-live.

Do the vendors have development teams with the required skills?

The exact list of skills will vary based on the feature list you developed, but generally, for digital patient communications, the vendor will need the capability to build and develop protocols for:

- Bidirectional messaging for both web and desktop applications
 - Internal messaging
 - Secure web messaging
 - Easy to use staff UI
 - Separate functionality and monitoring capacities for administrators and staff
 - Chatbot automation, including decision tree and natural-language-processing capabilities
 - Text-enablement for existing lines
 - EHR-driven automation workflows
 - Vendor-specific automation workflows
 - EHR integrations
 - Other vendor integrations such as telehealth, check-in, wayfinding, etc.
 - Analytics
 - Deliverability and fallback processes
 - Strong security programs and HIPAA compliance
 - User management with unique permissions and access
-



WORKSHEET G - TECHNICAL COMPETENCY AND CAPABILITIES

Answer the questions and score each vendor. Total up each column at the bottom.

SCORE EACH VENDOR: NO = 1 SOMEWHAT = 2 YES = 3

	VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
<i>Circle the integration types you need: API FHIR HL7v2 Flat files Other</i>	API, HL7v2, Flat files		
<i>Can the vendor handle multiple integration types?</i>	3		
<i>Is the vendor's integration team in-house or outsourced? (score 3 for in-house, 2 for outsourced)</i>	3		
<i>Does the vendor have enough experienced staff for your integration needs?</i>	3		
<i>Can the vendor's integration team use your tools?</i>	3		
<i>Do the vendor's team members have healthcare experience?</i>	3		
<i>Do the vendor's engineers and integration team have EHR experience?</i>	3		
<i>Can the vendor achieve high uptimes with high availability?</i>	3		
<i>Are they measured separately?</i>	3		
<i>Does the vendor offer integration and platform configuration capabilities that allow you to innovate and extend custom workflows?</i>	3		
<i>Does the vendor offer pre-built, validated templates to turn on new workflows quickly?</i>	3		
<i>Can non-experts execute the templates?</i>	3		
<i>Does the vendor offer ongoing training or any knowledge resources after the initial go-live?</i>	3		
VENDOR TOTALS	36		



WORKSHEET G - TECHNICAL COMPETENCY AND CAPABILITIES (CONTINUED)

Here are additional considerations to keep in mind as you evaluate vendors. Write in your answers.

VENDOR 1
WELL HEALTH®

VENDOR 2

VENDOR 3

What escalation processes does the vendor have in place for outages? Do they have detailed plans for managing multiple feeds and outages?

WELL has multiple teams to tackle multiple issues. WELL also has a developer on-call at all times for any major escalations. WELL Product, Engineering, and Customer Experience teams use cross-functional workflows to resolve issues.

How does the vendor use your data? If you cancel the service, how is the data handled?

WELL utilizes customers' data to provide dashboards, reports, and to help customers optimize their use of the WELL technology. When a company is no longer a customer, their data is purged from WELL's data stores.

What does the vendor allow you to edit and customize without engaging them?

WELL is designed to be easily configured and managed by the client, allowing for agility in customizing and managing a health system's patient communication infrastructure.

What initial training does the vendor offer?

WELL provides all clients with access to a Learning Management System, Administrative Guides, and a Support Library with over 100 articles that cover WELL features and functionality in depth.

What skills do the vendor's development teams have? (Refer to the sidebar on PAGE 21)

WELL's team has these required skills including deep EHR integration and technical experience working across healthcare organizations of all sizes.

MAINTAIN, SUSTAIN, AND FUTURE-PROOF

To maintain your patient communication platform, you want a vendor that offers attentive, responsive customer service along with ongoing product development to support and maximize this long-term investment. Since technology is ever-evolving, look for vendors who consistently release new products and updates with the latest innovations. Check whether potential vendors have partnerships with healthcare leaders to keep you at the forefront of the ever-changing healthcare industry.

Key considerations to ensure a vendor can deliver and continuously improve upon their platform:

Does the vendor maintain easily accessible documentation to make it easy for your team to read and learn about the product?

Vendor-provided documentation, such as support articles and issue resolution processes, will help your team learn the platform and easily answer common questions.

Is the vendor team able to act as a collaborative partner?

Does the vendor have a team dedicated to customer success who will be your point of contact for any technical and service needs?

What kind of autonomy does the system provide you if you want to make configuration changes?

Does the platform allow you to be self-sufficient and make changes when you want or do you need to contact the vendor each time you need to make changes? If the platform does not offer an automation engine, ask the vendor what their typical turnaround times are for configuration changes.

What is the vendor's process for requesting support?

Check the vendor has a support process in place so your team can easily reach out with questions and know when to expect a timely response.

Is the vendor making continual updates?

Updates are inevitable as technologies, patient needs, and the healthcare industry evolves and changes. Make sure you are not buying a communication platform that will quickly become dated and inefficient.

Does the vendor have relationships with existing EHRs?

Vendors that have relationships with an EHR industry leader - such as Epic, Cerner, and Meditech - ensure that these clients receive best-in-class service through EHR-native functionality.

Is the vendor innovating with new integrations, product features, and/or partnerships, especially in light of real-time, ongoing COVID-19 needs?

For example, does the vendor offer COVID-19 vaccine features to manage scheduling messages, appointments, and/or the ability to engage patients outside of your EHR? Is the vendor incorporating cutting-edge technology such as AI capabilities into their platform?

SUPPORT AFTER GO-LIVE

How your business will be handled after implementation is critical to long-term success.

Check if the vendor offers the following support after the platform goes live:

1. Access to free online courses for training new hires and managing turnover effectively.
2. Comprehensive knowledge base to easily answer common questions.
3. Detailed project management/onboarding process based on customer goals.
4. Effective success plan after Go-Live to ensure customers continue to receive ongoing value for their investment.



POTENTIAL EXTRA COSTS WITH VENDORS

- If you have an existing solution, there may be migration costs.
- Most software requires a setup and integration with other systems so check if there are onboarding costs.
- Check if there are any offboarding costs if you decide to leave a platform.



WORKSHEET H - MAINTAIN, SUSTAIN, AND FUTURE-PROOF

Answer the questions and score each vendor. Total up each column at the bottom.

SCORE EACH VENDOR: NO = 1 SOMEWHAT = 2 YES = 3

	VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
<i>Does the vendor provide and maintain accessible documentation about their products?</i>	3		
<i>Will you have a point of contact for any technical and service needs?</i>	3		
<i>Does the platform allow you to make changes when you want?</i>	3		
<i>Is the vendor making continual updates to its product?</i>	3		
<i>Does the vendor have relationships with industry-leading EHRs?</i>	3		
<i>Is the vendor continually implementing new integrations, product features, and/or cutting-edge technology?</i>	3		
VENDOR TOTALS	18		



WORKSHEET H - MAINTAIN, SUSTAIN, AND FUTURE-PROOF (CONTINUED)

Here are additional considerations to keep in mind as you evaluate vendors. Write in your answers.

VENDOR 1
WELL HEALTH®

VENDOR 2

VENDOR 3

What kind of support and customer service does the vendor provide?

WELL offers a number of support resources including a Customer Experience department to assist with how-to and enablement questions. Clients can submit technical support tickets and depending on the contract, many clients are assigned a dedicated Customer Success Executive and team.

What is the vendor's process for requesting support?

Customers can submit a technical support request through the Customer Resource Center. Clients who have a Customer Success Executive can email their CSE directly with any questions.

If you need to contact the vendor every time you need changes, what are their typical turnaround times?

WELL is designed to be self-managed but if a client needs to contact WELL, they can contact their Customer Success Executive or the Customer Resource Center. "High Priority" tickets generally get a response from the Support Team the same day received, along with timely updates regarding the issue.

Does the vendor have migration, onboarding, or offboarding costs? If so, what are they?

When it comes to migrating from one EHR to another while using WELL, a statement of work for the migration is put together to determine the number of hours and resources required.

VENDOR SECURITY AND COMPLIANCE

Security is critical in patient communications and is often a reason many organizations retain a HITRUST Certified vendor solution. Credible vendors maintain a comprehensive information security program covering all aspects of information security practices, policies, and procedures that align with your organization's policies.

When buying a patient communications solution, some key questions to ask a vendor are listed below.

Is the messaging HIPAA compliant?

Text messaging and email are examples of messaging that need to be HIPAA compliant so healthcare organizations can safeguard electronically protected health information (ePHI) between authorized users such as providers and patients.

Are they HITRUST® Certified?

The HITRUST approach is a comprehensive information risk management and compliance program to provide an integrated approach, which ensures programs are aligned, maintained, and comprehensive to support an organization's information risk management and compliance objectives.

How committed is the vendor to deploying and enforcing the latest information security frameworks?

Information security frameworks protect the integrity, confidentiality, and availability of data. One useful proxy for this commitment is a dedicated senior-level information security official.

Are they regularly tested and audited by independent third parties?

Vendors who invest in a third-party audit can objectively demonstrate that their systems follow stringent requirements in privacy, security, integrity, and confidentiality.

Does the vendor have a trained Incident Response Team, which includes members of all integral functions across the business?

Incident Response Teams are there to address potential incidents in a timely manner, protecting your data. Also, does the Incident Response Team conduct tabletop sessions regularly and maintain a well-defined, organized approach for handling any potential threats?

HITRUST® evaluates solutions across 19 security domains, including:

- Information Protection Program
- Endpoint Protection
- Portable Media Security
- Mobile Device Security
- Wireless Security
- Configuration Management
- Vulnerability Management
- Network Protection
- Transmission Protection
- Password Management
- Access Control
- Audit Logging & Monitoring
- Education, Training, and Awareness
- Third-Party Assurance
- Incident Management
- Business Continuity & Disaster Recovery
- Risk Management
- Physical and Environmental Security
- Data Protection and Privacy 19



WORKSHEET I - SECURITY AND COMPLIANCE

Answer the questions and score each vendor. Total up each column at the bottom.

SCORE EACH VENDOR: NO = 1 SOMEWHAT = 2 YES = 3

	VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
<i>Does the vendor provide HIPAA-compliant messaging?</i>	3		
<i>Is the vendor HITRUST Certified?</i>	3		
<i>Is the vendor regularly tested and audited by independent third parties?</i>	3		
<i>Does the vendor have a trained Incident Response Team?</i>	3		
VENDOR TOTALS	12		

Here are additional considerations to keep in mind as you evaluate vendors. Write in your answers.

	VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
<i>How does the vendor deploy and enforce the latest information security frameworks?</i>	WELL has a dedicated Director of Information Security and a team of security professionals that continually review WELL's security posture. WELL Maintains ISO 27001 and HITRUST certifications to ensure the Information Security Program at WELL is reviewed and up-to-date by external parties on a regular basis.	_____	_____
<i>If the vendor has a trained Incident Response Team, what is their approach to handling any potential threats?</i>	The WELL incident response team monitors all systems for abnormal behavior. If there is a suspicious event, the team identifies the attack, understands its severity, investigates the attack, completely restores operations, and takes action to ensure it won't recur. The team also coordinates communication to customers affected by the incident.	_____	_____

STEP 4

SET A TIMELINE

Now that you have identified what you need in a patient communication platform, the next step is to set a realistic timeline with deadlines with your internal team, including the Key Stakeholders. A timeline will help keep everyone accountable for their specific roles and ensure steady progress in this purchase decision.



CONSIDERATIONS TO KEEP IN MIND WHEN CREATING YOUR TIMELINE:

Vendor response time

Every vendor has a different response time, so if you need quick answers, state that upfront when you contact a company. Some will respond quickly and others may take more time; this is not an indication of if their product is right for your needs.

Vendor selection

When building your timeline, make sure you include time for your organization to make a decision. This includes getting buy-in from stakeholders, ensuring the budget is in place, working with procurement, and any other steps based on your internal procedures.

Contracting time

Once you've selected your vendor, you still need to put the contract in place. This will take time as it involves reviewing both the business and legal terms. How long this takes will depend both on your organization and the vendor. Vendors who typically work with organizations like yours are more likely to have standard terms that will be appropriate for your organization and will require little to no revisions, accelerating the contracting process.

Implementation timeline

Every implementation will vary depending on your company's needs. Ask potential vendors for estimates based on their experiences with companies of your size and with your EHR.

Go-Live

Go-Live signals the end of your implementation period and is critical for the successful adoption of the product by users at your organization. This timeframe should include ongoing check-ins with your implementation and success teams to ensure questions are answered and the product is operating as outlined in your Statement of Work. This is also an important time to identify any gaps in understanding and ensure the processes you have developed to support the new product operate as intended.

EXAMPLE TIMELINE OF PROJECT MILESTONES FOR ENTERPRISE HEALTH SYSTEMS

PHASE 1

WEEK 1 Project Kickoff	WEEK 2 Practice Structure	WEEK 3 Settings	WEEK 4, 5 Automation Build	WEEK 6 User Testing	WEEK 7 User Training	WEEK 8 Production Build	WEEK 9 - 11 Pilot Go-Live
Technical Unit Testing							

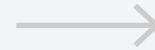
PHASE 2

WEEK 12 Phase 2 Kick-Off	WEEK 13 Finalize Structure	WEEK 14 Finalizing Settings	WEEK 15, 16 Automation Updates	WEEK 17 User Training	WEEK 18, 19 Final Build	WEEK 20 Go-Live
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EXAMPLE TIMELINE OF PROJECT MILESTONES FOR NON-ENTERPRISE HEALTH SYSTEMS

ONBOARDING

Action Item 1 VPN Template	Action Item 2 Location Template	Action Item 3 Admin Training
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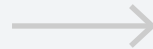


BUILD

WEEK 1 Project Kick-Off	WEEK 2 Automation Review	WEEK 3 Automation Build
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UNIT TESTING

WEEK 4 Unit Testing	WEEK 5 Settings Training
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PRODUCTION BUILD AND CUTOVER

WEEK 6 UAT	WEEK 7 Use Training	WEEK 8 Production Activities	WEEK 9 GO LIVE & Check-Ins
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WORKSHEET J - VENDOR TIMELINES

Which vendor offers the timeline that matches your needs the best? Fill in the timeline each vendor offers for each step. In the bottom cell, score 3 for the best match, 2 for the next best match, and 1 for the least best match.

How many weeks for each of the following:	VENDOR 1 WELL HEALTH®		VENDOR 2	VENDOR 3
	Enterprise (See Page 32)	Non-Enterprise (See Page 33)		
ONBOARDING Client orientation. Establish initial VPN connectivity, provide introductory trainings. Determine location mapping structure.		Weeks 0-1		
BUILD Initial practice. Location, automation/messaging, and technical build.		Weeks 2-3		
TESTING & ACCEPTANCE Technical unit testing. If necessary, operational workflow testing. User Acceptance Testing, culminating with client approval to move vendor’s accepted build into client’s production environment.		Weeks 4-5		
PRODUCTION BUILD AND CUTOVER Accepted build is moved to production. Technical interfaces go-live.		Weeks 6,7,8		
GO-LIVE Operational go-live. Platform is ready to be used.		Week 9		
Which vendor offers the timeline that matches your needs the best? Score 3 for the best match, 2 for the next best match, and 1 for the least best match				
VENDOR SCORE				

STEP 5

EVALUATE & SCORE VENDORS

As a potential new customer, you are going to be very popular as you contact vendors for demos and price quotes. During this process, focus on the facts. Carefully consider each vendor's solution and how it fills your needs. Keep in mind that a live demo isn't going to demonstrate how easy each solution will be to use since the person doing the demo knows the product well. This is another good time to call colleagues to ask about their experience with a particular platform and, if you haven't already, review the KLAS rankings.

With your colleagues involved in the evaluation process, use the total scores on the worksheets and your answers from the additional considerations section on Worksheets G, H, and I to compare the various vendors. Disqualify those that don't meet your needs. After evaluating your choices, narrow it down to your top vendor.

Next, you will need to create a business case for getting the necessary approval for your first choice.



WORKSHEET K - EVALUATE & SCORE VENDORS

Write the worksheet page totals for each vendor here. Add up each column to get the total score for each vendor.
Review the additional considerations you used to evaluate each vendor for Worksheets G, H, I. **Is there a clear winner?**

	VENDOR 1 WELL HEALTH®	VENDOR 2	VENDOR 3
WORKSHEET B FEATURES TO CONSIDER	Subtotal = 66		
WORKSHEET C USE CASES TO CONSIDER	Subtotal = 57		
WORKSHEET D YOUR KEY STAKEHOLDERS AND DECISION-MAKERS			
WORKSHEET F VENDOR VIABILITY & PROVEN SUCCESS	24		
WORKSHEET G TECHNICAL COMPETENCY AND CAPABILITIES	36		
WORKSHEET H MAINTAIN, SUSTAIN, AND FUTURE-PROOF	18		
WORKSHEET I SECURITY AND COMPLIANCE	12		
WORKSHEET J VENDOR TIMELINES			
SUBTOTAL	213		
TOTALS			

STEP 6

CREATE A BUSINESS CASE & MAKE A DECISION

In every purchasing decision, it comes down to two words: How much? No matter how perfect a patient communication platform seems, if the cost isn't approved by the key stakeholders and decision-makers, you're back at square one. Therefore, you need to build a good business case for your first choice by using the information in the worksheets and quantifying the cost of the solution by how much time and money it will save your organization. Illustrating the impact the solution will have through data analysis is the best way to convey the value of the patient communication platform you choose.

Ask your top vendor if they have an ROI tool or case studies about solving pain points similar to yours that can provide data and evidence on how that patient communication platform made a positive impact on organizations similar to your health system.

In building your business case, here are a few ways a patient communication platform can benefit health care providers:

Phone Volume

Reduction in staff time on phone and decrease in inbound call volume allows staff to focus on other priorities such as patient care and saves costs on phone personnel.

No-Show Rates

Decreasing no-show rates is essential to maintaining or increasing a health system's revenue.

Appointment Confirmations and Filling Slots

Ensuring all appointments are utilized leads to reclaimed revenue.

Staff Workload

A reduction in daily staff workload prevents staff burnout, cuts down on administrative costs, and increases morale.

Referral Conversion

Converting referrals to scheduled appointments leads to better patient outcomes and increased revenue.

Call Abandonment

Using bidirectional texting to reduce call abandonment leads to increased patient satisfaction and better customer service.

Patient Satisfaction Surveys

Sending surveys from a provider's phone number after an appointment increases the likelihood of surveys being completed. This allows for healthcare organizations to follow up with patients and do service recovery.

Portal Enrollment

Increased portal enrollment delivers more patient engagement

CALCULATING ROI

When using a vendor's ROI tool, check that they have the ability to provide an ROI build based on actual data from real client experience.

[CALCULATE YOUR ROI HERE](#)



ABOUT WELL HEALTH

WELL Health® is a SaaS digital health leader in patient communications and the 2021 and 2022 Best in KLAS winner in Patient Outreach. The WELL Health intelligent communications hub is the only two-way digital health solution engaging patients throughout their entire care experience. WELL Health enables conversations between patients and their providers through secure, multilingual (19 different languages) messaging in the patient's preferred communications channel: texting, email, and telephone. WELL Health helps 200,000+ providers facilitate more than 1.1 billion messages for 37 million patients annually. By unifying and automating disjointed communications across healthcare organizations, WELL Health reduces unnecessary provider stress and potential errors, while increasing patient visits and loyalty.

Founded in 2015, WELL Health is based in Santa Barbara, California. WELL Health has been named No. 10 on the 2021 Forbes America's Best Startup Employers list, No.133 fastest-growing company in North America on the 2021 Deloitte Technology Fast 500, and ranked on the Inc. 5000 list of fastest-growing private companies for two consecutive years.

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