

Human + Digital Patient Engagement: Creating an Integrated Omnichannel Experience Today for a Holistic and AI-Ready Future

Lisa Casper and Shelly Carolan

In the fiercely competitive healthcare landscape, seamlessly integrating digital interaction with in-person care is more than a strategic choice -- it is a compassionate imperative that transforms the patient experience and elevates healthcare beyond mere service. It is about touching lives, creating an empathetic journey, empowering consumers, and staying ahead in a competitive space.

Rather than thinking of a patient at a single point of care, healthcare providers should focus on delivering value across all care touchpoints and building strong brand differentiation to establish trusted, continuous, and more “human” relationships with consumers. This is a tall order. A [recent study](#) of health system executives by Deloitte found that while 9 in 10 said digital technology was enabling a shift to focus on consumer health and well-being, less than half believed their enterprise could offer consumers an ideal “digitally enabled, always on care and well-being state” within the next 3 years, reinforcing the importance of maintaining high-quality in-person care options now while building for the future.

In this piece, we discuss how healthcare providers can develop and implement a more holistic engagement strategy that embraces modern consumer experiences and creates a seamless digital ecosystem personalized to the individual needs of each person’s care and well-being journey. We also explore data privacy considerations and the process, governance, talent, and culture implications of implementing a successful [omnichannel care experience in healthcare](#). This article

applies most directly to executives at for-profit, private, and investor-backed businesses including healthtech, retail, DTC, and specialty care service providers but will also apply to leaders at traditional healthcare organizations who are adapting to the evolving landscape.

Setting the Stage

The concept of omnichannel care, which we explored in our previous [article](#), addresses the accessibility of care through a variety of virtual and direct care mediums. However, delivering a personalized, patient-centric experience goes beyond the medium of care delivery and access. Rather, the evolved concept of “omnichannel care” addresses the notion of the “always on care and well-being state” referenced above. Omnichannel care incorporates the numerous non-clinical aspects of the health journey, including brand appeal, customer acquisition, health record transparency, consumer choice and quality transparency, and inter-visit engagement. In many cases, Marketing, Research, Technology, AI, and CRM teams are integrating to rethink the ways healthcare providers engage prior to, during, and following care visits to build numerous digital points of interaction for patients to engage with healthcare services and information.

Deloitte [has also showed](#) that, while many healthcare leaders feel existing offerings “within the walls” of their enterprise align with consumer needs, this alignment does not continue “before” or “beyond the walls,” which is

imperative as they shift their focus from single episodes of care to holistic health². By reexamining the way patients enter the care system and move through all its parts, new healthcare providers can address critical pain points and embed their brand identities along every step of a consumer’s journey.

Understanding the Consumer Health Journey

To implement a truly consumer-centric digital strategy, healthcare providers must first understand all touchpoints across a consumer’s care journey. Often, teams begin by interviewing consumers, existing patients, and provider team members to develop journey maps, which identify all the steps involved in accessing care from start to finish. Combining this information with aggregated consumer data, they can create personas that represent distinct types of patients based on their needs and preferences.

Once all key touchpoints are identified, teams may need to build or redesign their brand identity using meaningful value propositions that address the specific needs of each persona. They should align these value propositions with platforms and channels that deliver personalized content and interconnectivity with existing systems. Furthermore, leadership must internally communicate the unique value they deliver to consumers and empower team members to put this new values-based brand promise at the center of everything they do.

Engagement Tracking

Following implementation of a digital suite of tools, Go-To-Market (GTM) teams should implement a Key Performance Indicator tracking process, which incorporates both attitudinal and operational data to maximize consumer engagement and retention. Program-level GTM KPIs – such as Satisfaction, Trust, Effort, Customer Acquisition Cost (CAC), Customer Lifetime Value (CLV), Lifetime Value (LTV), Conversion Rate, Retention Rate, and Return on Investment (ROI) – will serve as a compass guiding their strategic decisions. These KPIs are the metrics that matter, providing the insight needed to refine and optimize GTM strategies and stay consistent

with the brand voice. The graphic below illustrates the kind of segmentation and engagement KPI designation that will allow market players to focus their efforts.

SEGMENT	VALUE PROPOSITION	PLATFORM	CHANNEL	ENGAGEMENT KPI
Young adults	Convenient access to care anytime, anywhere	Telehealth app	Mobile phone	App downloads, usage rate
Chronic disease patients	Continuous monitoring and feedback on health status	Remote patient monitoring device	Wearable device	Device adherence rate
Older adults	Personalized support and guidance on health management	Virtual assistant	Voice assistant	Voice assistant satisfaction score

Data Privacy and Security

A final component of this process is data privacy and security. As digital consumer health engagement becomes more prevalent and personalized, entities need to ensure that they protect the health data of their customers. All enterprises utilizing consumer health data must respect the preferences and choices of consumers by obtaining consent, providing access, and honoring opt-out requests.

The U.S. Department of Health and Human Services has established [marketing guidelines](#) that grant individuals significant control over how their protected health information (PHI) is used and disclosed for marketing purposes. According to the guidelines, the following are examples of acceptable marketing uses for PHI:

1. Announcing a new health-related product or service that the practice offers to the general population.
2. Regularly communicating with individuals for purposes such as referrals for follow-up tests, reminders for prescription refills, etc.
3. Providing communication about case management or care coordination for the individual, or offering recommendations for alternative treatments, therapies, healthcare providers or care settings.

Additionally, providers must be aware of the policies and practices of both their care partners and the technology platforms they use for digital patient engagement. For example, Google Ads recently updated its policy to restrict advertising for online pharmacies and telemedicine providers. This policy change affects how businesses can reach their target audiences and promote their services through Google's platform.

It is important to note that, despite the stringency of industry regulations, several viable options for analyzing data and better marketing to patients remain. McKinsey & Company suggests employing the following attribution models to enhance patient engagement and satisfaction:

Marketing Mix Modeling: Utilizes regression analysis to understand the impact of various marketing tactics on patient appointment volume, spanning both traditional and digital channels; limitations include high-level measurement granularity and the need for A/B testing to enhance revenue forecasting.

Anonymized Data: Encrypts personal identifying information (PII) or protected health information (PHI) while allowing for personalized messaging and secure data sharing, offering enhanced patient experiences but requiring rigorous testing and robust infrastructure.

A/B Testing: Measures the impact of discrete marketing details, such as message wording, on consumer conversion and sales; known for its accuracy and simplicity, it can significantly improve conversion rates and revenue when employed effectively by healthcare providers.

Leadership & Talent Implications

As providers endeavor to bridge the gap of consumerization in healthcare and embrace a technology-enabled consumer experience, it will be critical to build teams that can meet the challenge. As strategies change so must team composition, capabilities, culture, and leadership. Consumer health is a multifaceted realm with no one-size-fits-all approach. Diverse leaders, hailing from backgrounds as varied as product management, marketing, operations, clinical

care, and beyond, play pivotal roles in shaping this critical domain. However, what unites them transcends their backgrounds: a shared mission dedicated to enhancing consumer experience and engagement, emphasizing that the pursuit of consumer-centric care knows no boundaries or borders.

As explained by Ardent Consumer Chief Officer Reed Smith in a recent Becker's Hospital Review article, "We've made a very conscious effort to try to evolve the vernacular that we use within the organization and move away from this idea of marketing and advertising and digital and traditional and CRM [customer relationship management] — and talk about engagement and talk about experience and talk about identity."

Leadership Support

The most critical aspect of the digitally enabled omnichannel care GTM process is the support of senior leadership. From the beginning, leaders must guide the digital strategy and select team members to help it succeed. They must equip their teams with the tools and talent that they need to build unique digital capabilities that will differentiate the consumer experience from that of its competitors. This process typically begins with leaders identifying "accelerators" who have a strong vision for the future and may have implemented related products elsewhere in the past. By building teams around these key players, leaders can streamline processes and reduce competing internal priorities to ensure the strategy's success.

Emerging and Evolving Roles

Once leadership has developed a clear roadmap for the evolution of their consumer engagement tools, they may begin attracting talent or developing team members to meet these needs. At its core, the GTM process for a digitally enabled omnichannel care approach requires merging marketing talent, who can effectively engage patients, with tech talent, who can develop innovative solutions to improve the consumer experience. Often, we will see these individuals combined into one cross-functional Patient Experience or Customer Experience team.

Individuals on the GTM team must be strategic thinkers with an innate digital acumen who can anticipate and respond to changing consumer needs and market conditions. They must also be influential, confident, and resilient enough to cope with stress and ambiguity, prioritizing delivering positive outcomes for patients. The process to develop a suite of omnichannel care experiences will be ever-changing, meaning team members must be able to adapt quickly to internal priorities as well as rapidly evolving market conditions. The most successful GTM team will put their patients / customers first while demonstrating agility in the face of obstacles and setbacks.

Patient-Centric Culture

A frequently overlooked yet critical component for GTM teams are the needs and capabilities of the patients / customers they serve. Enterprises with patient-centric cultures take the time to consider factors like digital literacy, accessibility barriers (e.g., language), trust issues (e.g., privacy), and personal preferences (e.g., human interaction) that may impact how a consumer will engage with the tools and options provided to them. Teams must find ways to adequately account for these considerations while still allowing for innovation and “failing fast.”

Ultimately, the success or failure of a holistic engagement strategy often depends less on the tools and platforms it utilizes and more on the steps it takes to understand the value it provides consumers and align team members to deliver that value. As AI and other new tools are added to the digital ecosystem, GTM teams must ensure they are integrated into existing workflows and provide clinicians and staff with the knowledge they need to support proper implementation and usage.

Conclusion

In today's fiercely competitive healthcare landscape, leaders must craft consumer engagement strategies that prioritize delivering exceptional experiences. Achieving this goal involves a human-centered marketing approach by placing patients at the center of their mission. This begins with a deep understanding of the consumer health journey, its alignment with suitable platforms and channels, and the unwavering commitment to upholding the highest data privacy standards. Furthermore, leaders must focus on attracting and nurturing talent equipped with a patient-centric outlook and resilient disposition. Building a team with a culture of diversity, inclusion, collaboration, and innovation is crucial to the success of the process.

By diligently following these steps, healthcare enterprises can cultivate a dedicated patient base that not only reaps the benefits of improved health options and outcomes but also becomes enthusiastic advocates for their brand. This path will expand market share and revenue growth and help build a competitive edge for emerging healthcare providers in the era of digital transformation.

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About the Authors

Lisa Casper is a Principal in WittKieffer's Investor-backed Healthcare Services practice. Her experience extends well beyond healthcare, implementing her expertise of digital and traditional consumer engagement models into healthcare. As part of our investor-backed healthcare market team, she collaborates closely with our other experts in specialty provider, payor, and retail healthcare and consumer wellness areas, among others. Her background in the consumer, wellness, and patient engagement sectors uniquely positions her as a respected and relied-upon advisor, empowering clients to secure game-changing leaders who will drive them toward their next phase of growth.

Shelly Carolan is the Managing Partner and Practice Leader for our Investor-backed Healthcare Services practice. She has broad and deep expertise across the healthcare and life sciences industries. Prior to her career in executive recruitment, she held a number of C-suite positions at PE-backed and private healthcare service organizations.