



Healthcare Partner Playbook

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Market Opportunity



Why Healthcare?

- 67% of healthcare companies plan to increase their CPaaS spending in 2022
- 57% of healthcare companies currently work with CPaaS providers
- 14% of healthcare organizations plan to replace their CPaaS provider in 2022
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Why CPaaS?

- CPaaS revenue to exceed \$10 billion globally in 2022
- 45.9% of successful companies are using or had been planning to use CPaaS in 2021
- 85.7% of healthcare participants are using CPaaS compared to 53.8% of all participants

Patient Lifecycle Use Cases

By Stage:

1. Pre-Admission

- Appointment/ride scheduling
- Pre-appointment questionnaire on health history, status, emergency contacts, current medication, and/or preferences
- Healthcare provider digital transformation - including Smart IVR and F2F

2. Administrative Process

- Appointment reminders: virtual meeting URL, pre-appointment instruction, new patient insurance information collection, and pre-screening questions
- Appointment cancellations, no-shows, and rescheduling

Patient Lifecycle Use Cases

By Stage:

3. Patient Stays/Direct Patient Care

- COVID-19: verification of safety compliance, confirmations, and patient waiting updates
- CRM/application integration
- Virtual appointments
- Training
- SMS alerts

4. Discharge Process

- SMS notifications: test results, prescriptions, and travel alerts
- Hotline: smart IVR for instructions, transportation pick up information, and prescription status
- Enrollments/pharmacy selection

Patient Lifecycle Use Cases

By Stage:

5. Post-Discharge

- COVID-19: vaccination/testing record management and alerts
- Insurance policy changes/claim statuses
- Follow-up appointment reminder/scheduling/billing
- Post-appointment patient surveys

6. Other

- Security: encryption, access control, governance, policy enforcement (granular role-based access options), and PCI/HIPAA compliance
- Healthcare worker staffing shortages: automation, reporting/analytics, simplified and fast setup, and deployment
- Emergency preparedness

Provider Pain Points



1. Manual patient lifecycle management

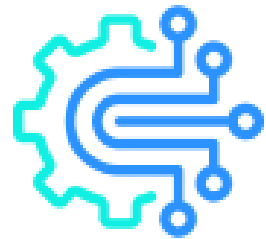
There are many steps in the patient care process that vary by patient. Rather than manually managing this process, tackle it with automation using appointment requests, patient forms, appointment reminders, follow-up communications post-appointment, prescription refill notifications, follow-up treatment, and more to increase efficiency and boost patient satisfaction/loyalty.



2. Security and compliance

Patient data is extremely sensitive so security breaches and HIPAA violations can be very costly and healthcare companies need to have security measures in place to protect against these types of events. Reputation management also plays a key role here as healthcare providers have important communications and reminders to send to patients and need to avoid being labeled as spam, scam, or fraud.

Provider Pain Points



3. Integrated data management

Healthcare providers receive patient data from a variety of sources – administrative data, patient medical records, transcripts, clinical notes, patient surveys, etc. – and many cannot integrate this data, making it harder to see the actual value of the data and compile a comprehensive profile for the patient.



4. Outdated or antiquated notification technology

When done manually, notifying both patients and employees consistently and timely is challenging to scale and manage, it can also affect the ability to accurately compile data from these interactions.



5. Staffing shortages

Especially with the onset of the pandemic, the healthcare industry has faced significant staffing shortages, which affect the patient experience and the timeliness of receiving care.

Who to Talk to

Target Audience:

Mid-Market Healthcare Organizations:

- Regional Healthcare Systems
- Ambulatory Care
- Multi-location
- Senior Living Homes
- Insurance
- Smaller mid-tier insurer/healthcare providers who haven't tapped into automation
- Veterinary services
- Concierge providers in medical services
- Healthcare appointment schedulers
- Healthcare internet of things (IoT) companies, including senior alert buttons

Who to Talk to

Mid-Market Organization Characteristics:

- Top IT Challenges: Staffing, Security, and Budgets
- Top Application Priorities: ERP, BI/Analytics, CRM, and Mobile Apps
- Infrastructure Priorities: Storage, Security, Disaster Recovery and Cloud

Target buyer job titles include:

- CIO, CTO, COO
- Director of IT and Operations
- Director of Customer Support, Customer Care and Customer Experience
- Telco Unified Communication/Contact Center Managers
- Director of Administrative Services
- Receptionist Appointment Scheduler
- Director of Purchasing/Procurement



Meet Janet, CIO

"What technologies will help me meet my hospital's long-term IT goals, support optimum patient care, meet compliance and drive innovation in my organization?"

Responsibilities

- Responsible for the overall management of the IT department and budget
- Develops strategic, long-term IT goals to accomplish business objectives
- Consults with other C-level personnel on technology-related needs and purchasing decisions
- Typically reports to CEO but may report to CFO

Challenges

- System interoperability issues, meeting security and compliance, and balancing human capital resources to meet regulatory and business requirements.
- Concerned with hardware and software updates, EHR systems and integration, analytics and Big Data initiatives, patient portals, leveraging IT to manage population health initiatives and best practices for data management and patient satisfaction - with a concern for security underlying all.



Meet Janet, CIO

IT Decision-Making Involvement

- Leads IT department in planning
- Helps determine if the organization will support new technologies for advanced patient care
- Determines how to handle and use a growing stash of digital data

Key Messages

- Differentiate your hospital with IT solutions that help you transform care delivery, boost safety and security, promote patient engagement, and maximize mobility and efficiency

Key Questions / Conversation Starters

- How far along are you in the adoption of telemedicine and other patient-centered technologies?
- What analytics and data management tools are you using? EMR upgrade? Datacenter or mobility refresh?



Meet Joseph, CTO

"How can I narrow down the IT tools most worth my time?"

Responsibilities

- Develops technical standards for enterprise-wide computing environment
- Manages departments within IS, including network services and data center operations
- Typically reports to CIO or CEO; may also collaborate with chief innovation officer, if the facility has one

Challenges

- Needs to justify IT spend/conditions to CIO
- Must actively participate in strategic C-level discussions, using intimate knowledge of technical systems to guide critical decisions and map out enterprise-wide plans
- Concerned with the latest IT trends and what peers are doing, and with innovation and patient satisfaction



Meet Joseph, CTO

IT Decision-Making Involvement

- Business knowledge to align technology-related decisions with organization's goals
- Monitors technology/trends that could impact the facility
- Maintains current information about technology standards and compliance regulations

Key Messages

- Reliable, innovative technologies that help securely address compliance requirements

Key Questions / Conversation Starters

- How have compliance regulations impacted IT decisions for your organization?
- What are your current top IT concerns? Security? Data storage? Staff efficiency? Others?



Meet Lauren, Director of Purchasing/Procurement

"How can I meet IT's demands while staying on budget?"

Responsibilities

- Directs, manages, and supervises daily procurement operations
- Develops operational and financial outcome measures
- Manages financials and creates the operating budget
- Could report to CFO or COO, or even a chief procurement officer, depending on how the organization is structured

Challenges

- Budget creation/review
- Juggling budget demands for all departments, including IT



Meet Lauren, Director of Purchasing/Procurement

IT Decision-Making Involvement

- Doesn't select specific IT components but guides IT to stay within the allocated budget to meet overall healthcare organization outcomes
- Also manages GPO relationships (ultimate PO placer)

Key Messages

- A wide range of IT options to fit your budget
- Maintain strategic alliances with top healthcare GPOs

Key Questions / Conversation Starters

- Has your IT budget increased or decreased in recent years?
- What are IT's biggest demands How does that impact your operating budget?



Meet Andrew, CFO

"How can you help me support risk mitigation, meet compliance and justify increased IT spend?"

Responsibilities

- Handles executive financial decisions for the organization
- Spans accounting, budgeting, credit, insurance, tax, and treasury
- Typically reports to CEO or COO

Challenges

- Sometimes must justify IT budget/issues to CEO/COO (often the CIO is doing this and CFO is checking and balancing)
- Dealing with the transition to value-based care, decreased Medicare dollars, and the need to cut costs
- Motivated by getting the biggest bang for the "IT buck"



Meet Andrew, CFO

IT Decision-Making Involvement

- "Ambassador" to the financial side of the organization
- Ultimately approves technology budget and points out risk to others in the C-suite
- Shifting from "number cruncher" to "strategic thinker" with increased responsibility for risk management

Key Messages

- Take advantage of a comprehensive set of solution offerings to help you minimize risk and realize a lower total cost of ownership

Key Questions / Conversation Starters

- Do you feel budget constraints are impacting your IT investments?
- What leading-edge technologies are on your radar for this calendar year?



Meet Nicholas,
VP/Director/Manager of IT

"How can you help me meet hospital IT demands and resource constraints?"

Responsibilities

- Either manages the IT department for a hospital or reports to a CIO
- Has tactical responsibility for executing organizational IT strategy

Challenges

- Must address many users' differing and diverse technology needs/challenges
- On front lines when there's an IT problem
- Concerned about security for IT, networks, and systems



Meet Nicholas,
VP/Director/Manager of IT

IT Decision-Making Involvement

- "Customers" are internal stakeholders, including clinicians
- Manages IT implementation but not always final purchase sign-off

Key Messages

- Single-source IT partner for end-to-end solutions
- Provide a foundation of security, compatibility, mobility, and stability
- Collaborations with leading ISVs, system integrators, accessory manufacturers, and EHR vendors
- Ongoing support and services for every stage of the technology lifecycle

Key Questions / Conversation Starters

- What are your major upcoming IT initiatives?
- Do you have C-level buy-in to upgrade your EMR system?

Offer Overview

IntelePeer's Healthcare Communication Automation delivers more personalized patient experiences with automation and integration. Our suite of customized products and services helps IT management:

Build quickly:

Custom workflows built in minutes and hours, not days.

Scale faster:

Rapidly deploy solutions that can scale to the entire enterprise, supporting millions of patient interactions.

Modernize in minutes:

Deploy pre-built enterprise-grade advanced voice and Communication Automation (CPaaS) offering — all from a trusted, proven partner.

Offer Overview

Solutions:



1. Appointment Management

Ensure patients show up to appointments with a best-in-class patient experience. Voice and text reminders and automated options to cancel and reschedule reduce costly no-shows while saving staff time with manual appointment communications.



2. Payment Processing

PCI Compliant payment processing supports each stage of the patient's payment process.



3. Patient Surveys

Ensure patients show up to appointments with a best-in-class patient experience. Voice and text reminders and automated options to cancel and reschedule reduce costly no-shows while saving staff time with manual appointment communications.

Offer Overview

Solutions:



4. Doctor, Patient, and Staffing Notification Alerts

Real-time voice recording and SMS notifications to employees and customers about specific procedure updates, safety protocols, and other important updates.



5. Prescription Management

Automate prescription requests, questions, instructions, and notifications with phone calls, Smart IVR, and SMS.

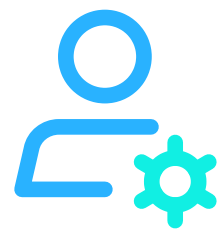


6. COVID Hotline

Eliminate the need for live agents to process common business questions. Automate answers to COVID inquiries with IntelePeer's no code Smart IVR application and set up routing in minutes with real-time AI-based natural language processing and translation capabilities.

Offer Overview

Value-Added Services:



1. Admin Management

Manage features and functionality of employee and business communications from one portal, accessible from anywhere, anytime. Instantly update preferences, including routing.



2. Emergency Preparedness

Intelligent service that eliminates the use of static 911 locations for each user. Instead, the user's location at the time of the call is used as the 911 location.

Offer Overview

Value-Added Services:



3. High Security

Data security is a priority that we achieve with HIPAA and PCI compliance, two-factor authentication, encryption, access control, governance, policy enforcement, and granular role-based access options (single sign-on and end-to-end customer data encryption).



4. White-Glove Support

24/7/365 omnichannel customer support. Available from anywhere at any time.

What to Say

IntelPeer Value Proposition

IntelPeer delivers rapidly deployable communications solutions for an always-connected world. Our no code, low code, and co-creation options provide customers with simple, easy-to-use tools that can be utilized by anyone and are also accessible through developer APIs.

Our automated solutions, powered with AI and analytics, instantly improve your customer's communications experience. IntelPeer provides industry-leading time-to-value with solutions that work seamlessly with existing business software and infrastructure.

What to Say

IntelePeer Value Proposition

- Rapid time to value: Create custom workflows in hours, not days
- Scalable: Rapidly deployed solutions that can scale to the entire enterprise, supporting millions of customer interactions
- Low code, no code: Designed for everyone, regardless of technical experience
- Unmatched reliability: 99.999% network reliability and 24/7/365 access to industry-leading expert support
- Innovative: Beyond providing you with rock-solid voice services, we provide you with a platform that can lead you to the future as communications continue to evolve (automation, additional communication channels, analytics).
- Award-winning customer service: Our Customer Success and Managed Solutions teams are here to support you along the way to make sure you're getting the most out of our platform.
- Enterprise security: Our platform is scalable, secure, and compliant (GDPR, HIPAA, PCI, STIR/SHAKEN).

What to Say

Healthcare Value Proposition

1. Reduced no-show appointments

Avoid costly missed appointments with automated reminders and patient self-serve cancellations or rescheduling.

2. Personalized patient communications

Create tailored messages using rich APIs to connect with patients on a personal level

3. Streamlined workflows

Configure customized workflows to interact with patients as they reach certain steps in the patient process

4. Staffing productivity optimization

Tackle staffing shortages and lessen tedious administrative tasks with automation

5. Trusted, industry pioneer

We provided one of the first reliable and efficient COVID-19 vaccination appointment management solutions, which was successfully built, tested, and deployed in a matter of hours.

What to Say

Healthcare Value Proposition

6. Faster bill payments and revenue collection

Our platform automation capabilities, paired with our payment processing functionality, enable organizations to send automated reminders and make it easier for patients to pay their bills on time.

7. Disaster avoidance

We are strategic partners who consult with customers on their overall call strategy by helping them prepare for unexpected events with our other smartflow rules, analytics, and insights to improve your overall communication strategy.

8. Data security

Patient information is extremely sensitive, and we're committed to keeping that data secure as it's communicated (GPDR, HIPAA, PCI, STIR/SHAKEN compliant)

9. Revolutionize the traditional patient portal

Many providers have patient portals in place but haven't taken full advantage of the powerful capabilities to communicate with patients. Take your portal to the next level by creating a one-stop-shop for patients to message physicians and access personal records.

What to Say

Discovery Guide

- How are COVID vaccination appointments currently scheduled, if offered?
- Are you currently happy with that provider? What services do you receive from them?
- Is your organization affected by current staffing shortages, and how has that impacted the organization?
- What technology provider do you currently use for appointment management?
- What is your business plan in case of unexpected downtime?
- Has your business ever lost any calls/messages? If yes, how did that impact you?
- Do you know if your business receives proactive notifications during an unexpected power outage, surges in traffic exceeds capacity, security breaches occur, and/or other emergencies like COVID-19 impact company operations?
- What do you think it might cost you in employee productivity, customer satisfaction/loyalty, and revenue if your communications went down unexpectedly?
- Do you currently have call routing automation in place? Or do you require a live agent to answer and route calls to the direct departments?
- Would you be interested in a solution that helped you save in costs, improve patient satisfaction and reduce staffing for everyday patient needs?

What to Say

Discovery Guide

- How do you currently communicate test results with patients?
- What does your new patient setup process look like? Are the forms filled out electronically or on paper?
- If you could identify a bottleneck in the patient process, what would it be? Do you have anything in place currently to address this bottleneck and speed up this step?
- What are your core competencies, and how much of your time and effort is taken away from them?
- What barriers are repeatedly flagged in consumer surveys?
- What manual processes become bottlenecks as workload increases?
- When compared to e-commerce, what's missing from your consumer experience?
- What legacy IT systems require continued investment for maintenance, updates, and new features?
- What are the top call drivers for your consumer-facing teams?
- If you could identify three routine tasks that detract most from higher-value activities, what would they be?

What to Say

Objection Handling

1. I really don't see the impact/value of this solution.
2. What makes you different from the other CPaaS providers that offer healthcare solutions?
3. It seems very costly to remove the technology we currently have in place and replace it with this.
4. We are not interested as our processes must meet HiTrust regulatory compliance.

What to Show

Additional Resources:

- [Healthcare Solution - Datasheet](#)
- [Healthcare Solution - Sales Battlecard](#)
- [Atmosphere CPaaS - SimonMed Case Study](#)
- [Global Pharmaceutical Manufacturer Case Study](#)
- [HealthEZ Case Study](#)
- Healthcare Ebook - coming soon!

What to Do

Questions?

Contact your [IntelePeer Partner Representative](#) to start selling.