



DASH Marketing Recommendations: Introducing it to Your Patients

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Introduction

Implementing DASH is more than simply purchasing a new technology subscription. In order to use the solution to truly transform the patient experience, it requires organization-wide collaboration internally, and a clear plan for roll-out and communication externally. In this guide we outline sample plans and resources that you can use to ensure a successful DASH implementation. The best way to use this document is as a template version of a checklist. Pick what you think is important, plan what is accessible via your existing marketing and communication channels, and modify as needed for your practice.

Set A Goal

Setting a goal allows you to determine which tactics to deploy. Since you have limited time (even if you have unlimited money), it is important to focus only on tactics that will help you meet your goal. We outline some example goals below so you can pick one or two to align your campaign around:

- Potential Operational Goals
 - DASHin:
 - At least 50% of patients overall can complete mobile check-in
 - Reduce wait-time to under five minutes for 80% of patients
 - Collect co-pays from at least 50% of patient prior to appointment visit
 - DASHself:
 - At least 12% of patient appointments are self scheduled
 - DASHconnect:
 - At least 75% of patients are confirming, cancelling, or rescheduling appointments
- Potential Financial Goals
 - DASHin:
 - Drive patient volume using mobile check-in as a differentiator, increasing utilization by 5%
 - Increase POS collections by 10%
- Potential Experience Goals
 - DASHin:
 - Institute standardized patient intake experience across practices
 - DASHconnect:
 - Increase patient NPS by 10 points over a 3-month period

Segment Your Audience

Understanding your audience will help you execute on a successful launch for DASH. Messages and promotional activities that work for one segment of your audience may not be well suited for others. We advise clients to start with the following audience segment. Yours may be different.

- Existing patients: these are patients that have recently visited your practice and are likely to visit you in the near future.

- Past or new patients: these are patients that have not recently visited your practice and may be a good target audience for patient acquisition.
- Employees: your internal teams can ensure that patients feel empowered and that their inputs are received, acknowledged, and appropriately addressed. Ensure they're up to speed on the offerings, ways to communicate the information to your patients, and commonly asked questions.
- Community stakeholders and influencers: these may be a smaller group of individuals that can help spread the word about your efforts on meeting consumer expectations to the benefit of your practice.

Plan Your Promotional Tactics

To get started we recommend the following tactics to ensure that your mobile check-in solution is adopted quickly and helps you meet your goals. You may already be working with an agency that can provide more tailored material for you but if that's not the case, you'll find some of these resources particularly valuable.

- Press Release - publish a press release highlighting your selection of a mobile check-in solution (audience: influencers) [See Radix Health press release template](#)
- Contact reporters - use your local connections to secure an interview about your mobile check-in solutions to ensure that the impact of your press release is amplified (audience: influencers) [See Radix Health sample email](#)
- Communicate with your teams about the investment in DASHin and how they can help (audience: employees) [See Radix Health sample email](#)
- Feature an image on the homepage of your website announcing mobile check-in or contactless check-in (audience: existing patients) [See Radix Health website image example](#)
- Create a landing page to highlight your investment in a digital check-in solution. We have created some material you can use as a starting point. [See Radix Health website landing page template](#)
- If you have an automated voice recording that plays when patients are on hold while scheduling an appointment, for example, update the messaging to include an announcement about activating mobile check-in (existing patients) [See Radix Health sample script](#)
- If you currently have a monthly newsletter that goes out to all patients, include an announcement about activating mobile check-in (audience: existing or new patients) [See Radix Health sample messaging](#)
- If you frequently run postcard campaigns to residents in certain zip codes, run a campaign around activating mobile check-in (audience: existing or new patients) [See Radix Health postcard template](#)
- Do you have a patient advisory board? If so, ask them for ideas since they will have more creative and contextually relevant tactics and will amplify your message (audience: influencers)

- Social media - plan a social media campaign that includes images of mobile check-in (audience: employees, existing patients) [See Radix Health social media image templates](#)
- Get your providers on board. If they mention to patients that they are excited about mobile-check in, patients are likely to react positively and, in turn, tell others
- Modify your appointment reminders to include messaging on digital check-in. When patients are scheduling an appointment, tell them that you will be sending them a link to complete their form electronically. [See Radix Health sample messages](#)
- In-office artwork: Use posters and placards in your practice to advertise mobile check-in [See Radix Health poster template](#)

Plan Your Rollout

Not everything needs to or even should be activated at once. We recommend creating a roll-out plan as follows:

- Three months before Go-Live:
 - Review your check-in experience across your locations and create a plan for what it *should* look like. Too often we find that practices have disparate procedures in different locations. Sometimes, these add complexity to every part of roll-out without adding any value to the practice or benefit to the patients. Complexity isn't always bad, just make sure that it's worth the drag.
- One month before Go-Live:
 - Ensure that your internal stakeholders are aware of the upcoming roll-out.
 - Set the expectation that you will need their help in a successful roll-out.
 - Establish a point-person internally to answer stakeholder questions and concerns.
 - Identify reporters to reach out to for a story around digital check-in.
 - Build social media posts, emails, and other assets, communications, and collateral to prepare for your roll out.
- At Go-Live:
 - Get your internal stakeholders excited. Their enthusiasm will be far more effective than any poster we can co-create.
 - Appoint one person to collect, review, and share feedback on the mobile check-in process from clients and users across locations.
 - Publish press release and push social media posts live.
- Two weeks after Go-Live
 - Begin addressing feedback from patients. Identify any areas to fine tune and re-share via social, email, or other channels as appropriate.
- One month after Go-Live
 - Share KPIs and success metrics internally. Pick one or two numbers that everyone can rally around.
- Six months after Go-Live
 - Review KPIs and create collateral highlighting positive patient feedback for subsequent campaigns.

- One year after Go-Live: it's time to take those posters down, if you haven't already.

Appendix

Templates & guidelines

Press Release Template

Here's a press release template you can use. As a part of your implementation, we can include a press release published through a newswire service from Radix, but it's also helpful for you to promote this in the market and with local and trade publications via your PR or marketing team.

Provider Name Activates Contactless Mobile Check-In Across Network

ATLANTA, Georgia, Month __, 20__. Radix Health, Inc., provider of cutting edge patient access technologies, today announced that it has successfully completed the launch of DASHin, a cloud-based mobile-first check-in and intake solution, across the Provider Name network in City, State.

Radix Health's DASH® solutions help providers at medical groups, health centers, and hospitals across the United States deliver a frictionless patient experience. Provider Name elected to implement DASHcentral, DASHconnect, DASHself, and DASHin to empower patients to schedule their own appointments while seamlessly accommodating provider preferences, enabling more effective patient communication, and providing contactless check-in for their patients.

"We wanted to create a patient-centered digital front door that gives our patients the freedom to not only choose their own physicians and appointment schedules, but to also check-in at the convenience of their home" said Executive Name, Title of Provider Name. "This new technology streamlines scheduling and communication, and, empowers patients to complete their intake paperwork on their own mobile devices."

"We are pleased to bring on Provider Name to our rapidly growing client base. In addition to providing excellent care, they care deeply about meeting their patients where they are at. DASH was built with the vision of supporting such forward-thinking practices," shares Arun Mohan, MD, CEO, and Co-founder, Radix Health. "We know that providers want to empower their patients as consumers, and our team at Radix Health is focused on making the relationship between patients and their care team frictionless."

About Provider Name

Insert Provider Name information here.

About Radix Health

Radix Health is a technology company that believes patient experience starts with patient access. Our data-driven solutions align provider supply with patient demand, maximizing existing capacity, and reducing delays in care. We help leading medical groups optimize every step of a patient's appointment journey -- from alerting patients to needed care, helping them find the right provider, scheduling an appointment across multiple channels, and engaging with patients until the day of their visit. We take the busy work out of getting patients in the door so you can focus on the hard work of keeping them healthy. To learn more, please visit www.radixhealth.com or connect with us on [LinkedIn](#) or [Twitter](#).

Sample Email to Reporters

Whether you have a PR or marketing lead or a PR or marketing firm working with you, there may be existing relationships with news reporters and can quickly pitch stories. However, even groups that do not have this expertise can sometimes get media attention.

How to Hustle

First, assign someone on your team to make a list of local newspapers and authors covering recent healthcare stories (Especially those in your specialty area or areas of focus), or a list of emails or forms where you can submit story ideas. Then, create a template to send emails to the reporters asking for their coverage. Third, find someone in your practice that has a connection with the newspaper or the reporter (you'll almost always find one) so you have a higher chance of getting picked up. Ask this person to send the email.

Sample Letter

Hi **First Name**,

I'm writing on behalf of **Provider Name**, a **xx-provider specialty provider** based in **City**. I saw that you cover health care topics in our city and wanted to let you know about some exciting news before we share it externally. To make it more convenient for patients, and in response to market trends around consumerism and contactless services, we will be introducing digital check-in across our locations **this month**.

We're very excited about this, since it is a step in transforming care delivery in our community. If this is something you or your colleagues would be interested in covering, we'd love to chat.

Sincerely,

Your Name, Title, and Contact Info

Sample Internal Email

Subject: Exciting: Activating Digital Check-In at Provider Name

Hi everyone!

Some of you may know that we have recently partnered with Radix Health to empower our patients with the ability to check-in digitally for their appointments (sample goal). This is a significant investment in our practice which we are very proud of, and I am reaching out to provide you with an update, and to ask for your participation in making this a successful roll out.

Starting xx/xx, we will roll out DASH at Location 1. Patients will receive a text and an email the day before their appointment prompting them to check-in digitally. The forms that they are served will be rules-driven, which means that they will have all the forms that we've told the software that our patients need based on the appointment type. Once patients complete the digital paperwork, the data will flow directly to our PM system. Additionally, patients will be able to pay their co-pays or past-due balances through DASHin before their appointment. The payment gateway will connect to our merchant processing vendor to minimize additional work for the revenue cycle team.

While everyone on the patient access teams will receive training prior to the roll-out, you may have questions about whether or how something can be done. Additionally, you may receive questions from the patients. At this time it's very important for everyone to relay feedback -- good or bad -- so we can quickly learn and optimize. So whether it's a comment in passing or a complaint during an appointment, we want to know. I have asked This Person to help collect all feedback. We will respond to all feedback each week and share with you what we have learned.

As you can imagine, many of our patients may not be able to fill out forms electronically. For those, we will continue to follow the same workflow as before. But the shift to digital is inevitable and with your help, DASHin will help us be better operationally and more patient-friendly. And it will make our lives easier.

Thank you for your partnership in making this successful. I know our patients will really appreciate it.

Sincerely,
Executive

Sample Addition to Telephone Recording

You likely already have a message that patients hear when they are waiting on hold to speak with a scheduler or a provider. We recommend that you review that message and update it to add some language around checking in online. That allows you to take credit for being a consumer-centric provider and encourages patients to use the check-in solution you have just implemented.

Sample 1

We now offer online check-in so you can fill out and sign all your forms and also pay your copay on any device, before you even arrive at the office.

Sample 2

We are focused on making it easy and simple for you to get the care you need and manage your appointments, so we're announcing online patient check-in. This enables you to complete all your paperwork from the comfort of your home or on your mobile device. This also helps us to reduce waiting time for you!

Sample Newsletter Messaging

Mobile Check-In Now Available!

INSERT IMAGE OF MOBILE CHECK-IN

As a **Provider Name** patient, you can now complete your pre-appointment paperwork from the comfort and privacy of your own home on any device! We're rolling out a new secure solution so you can complete check-in paperwork, check in, and pay any copays and outstanding balance ahead of time on your phone, laptop, or computer.

This will make your visit faster and ensure that your care team has access to the latest information about you before you arrive. [Click here](#) (link to your site if there's a landing page) to read more about this on our website. And if you have suggestions or feedback about your digital check-in experience, please let us know!

Sample Update to Appointment Confirmation and Reminder Communication

You likely already have a message that patients receive when after they schedule an appointment or a reminder prior to their appointment date. We recommend that you review that message and update it to add some language around checking in online. That allows you to take credit for being a consumer-centric provider and encourages patients to use the check-in solution you have just implemented.

Addition to Appointment Confirmation Email for In-Person Visit

To make it more convenient for you, we have now enabled digital check-in. **Two** days before your appointment, you'll receive a link to complete your pre-appointment paperwork and pay your copay before you arrive.

Not comfortable checking in online? We're also happy to help you, so contact us here: [insert contact details].

Addition to Appointment Confirmation Email for Televisit

To make it more convenient for you, we now offer digital check-in. **Two** days before your appointment, you will get a link to complete your paperwork and pay your copay before your appointment starts. This will ensure that your provider has the information they need to provide you the best care.

Addition to Appointment Reminder Email for In-Person Visit

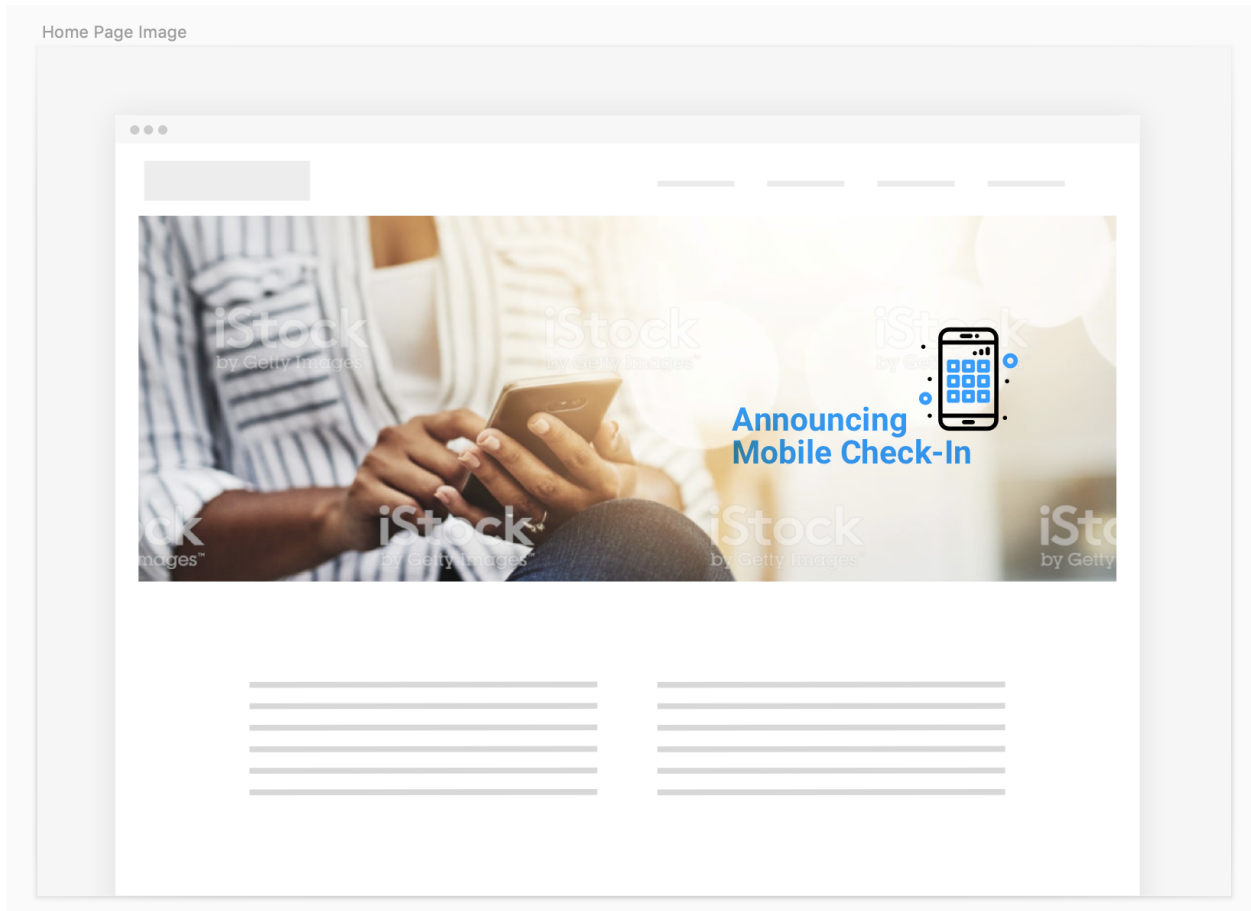
To make it more convenient for you, we have now enabled digital check-in. **Two** days before your appointment, you will get a link to complete your paperwork and pay your copay before you arrive. More than half of our patients prefer to check in online, but if you're someone who prefers pen and paper, that's totally fine: we still have those!

Addition to Appointment Reminder Email for Televisit

To make it more convenient for you, we have now enabled digital check-in at **Provider Name**. **Two** days before your appointment, you will get a link to complete your paperwork and pay your copay before you arrive. This will ensure that your provider has the information they need to provide you the best care.

Website Homepage Image Example

Here is an example of how you can update your homepage to announce the launch of your digital check-in solution.



Marketing & Website Copy for Check-In Page

You may want to create a landing page to share information about the check-in perspective. To make it easier for you to create the content for such a page, we created a template you can use. To make this most effective, we recommend that you tailor it to your brand's voice and tone. Feel free to use as much or as little as you'd like.

DIGITAL CHECK-IN IS NOW AVAILABLE AT **PRACTICE NAME**

We are excited to offer a new online check-in and registration process for all patients. You can now complete all your paperwork ahead of time at home or on any device!

We are partnering with Radix Health, a trusted healthcare solution provider, to help you with a simple, easy, secure check-in. Using our new mobile check-in, you can securely complete all your forms from the comfort of your home, as well as pay your copay from any smartphone, tablet, or computer.

Checking in on your device is convenient, saves time, and ensures that you can complete all check-in information with ease. As long as we have your current cell phone number and/or email address, you'll be able to check in digitally for your next appointment!

HOW IT WORKS

We've invested in a leading technology solution to better serve you. Look out for a text message or email a few days before your appointment from Radix Health, our digital check-in partner. Simply click the link provided and you'll be walked through the process with no usernames or passwords required.

Our online system allows you to check-in for your appointment and pay any copay ahead of time and from the comfort of your own home, reducing your wait time at our office and allowing you to securely register when it's most convenient for you. Then just let the receptionist know you have arrived when you get to the office for your appointment, and you're set!

Need help? No worries. Our reception desks will still be fully staffed with employees who are happy to help you with our new process. Want to provide feedback on your experience? We'd love to hear from you.

FAQS

Q: What is DASHin?

A: DASHin is a digital check-in and patient intake solution from Radix Health, which offers a suite of applications to manage a variety of patient access needs, such as scheduling, communication, check-in, and payments. Digital check-in from DASHin allows you to complete all your paperwork from your own mobile device or computer ahead of time and in the privacy of your home.

Q: Why is **Provider Name** partnering with Radix Health?

A: **Provider Name** is partnering with Radix Health to make it easier for you to complete your check-in forms at a time that is convenient for you. We want you to have a great patient

experience without unnecessary wait-time while maintaining best-in-class security. Completing your forms prior to your appointment ensures that your team and provider have the latest information and can provide you with the best care during your visit.

Q: Is the DASHin system secure?

A: Yes. Radix Health provides industry-leading privacy and security for your data. They are held to the same standards as **Provider Name**, related to protecting your family's information and ensuring HIPAA. For additional information about Radix Health's security, please visit <https://www.radixhealth.com/privacy-policy>.

Q: Do we need to use the new system for every appointment?

A: Yes. But once you have completed the initial registration, the next time will be much quicker because DASHin saves your answers. All you need to do is confirm that nothing has changed or make any necessary edits.

Q: Do I need to download an app to do mobile check-in?

A: No. There is no app – you simply click the link provided in the text message or email, no username or password required. This allows you to securely answer any registration and medical questions necessary for your appointment.

Q: What happens if I can't finish my registration before the appointment?

A: That's okay! If you have not completed your registration before the visit, please see someone at our registration desk. They will be happy to send you a new link which you can complete in the waiting room or provide you with paper forms if you prefer.

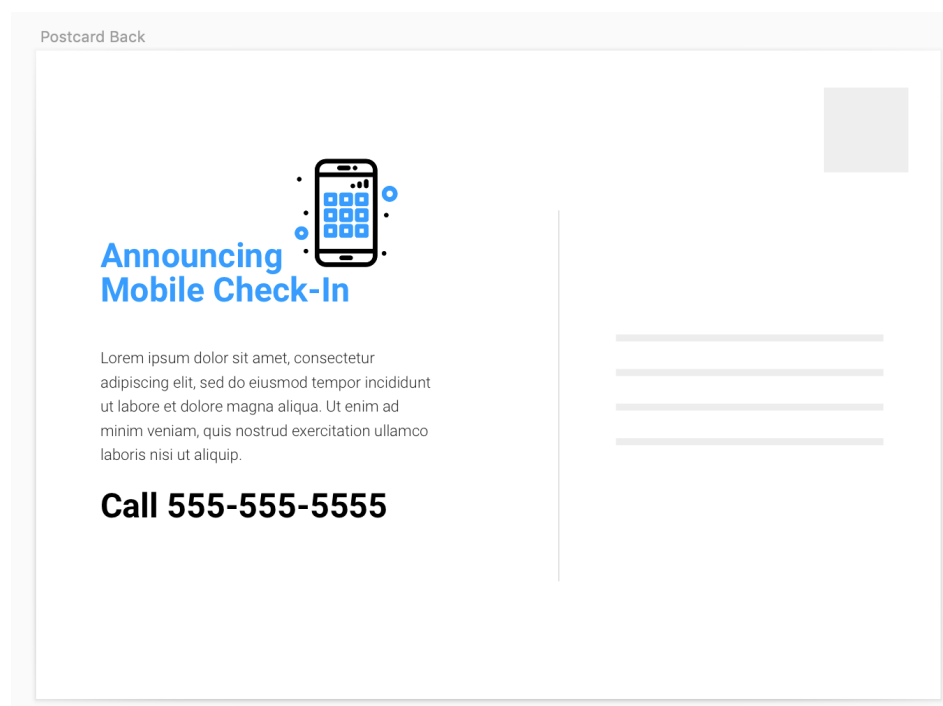
Q: What do I need to do when I arrive?

A: When you arrive for your appointment, simply let a member of our team at the registration desk know you are there and have a seat. You're all set, and we're excited to help you become the healthiest version of yourself you'd like to be!

Postcard Campaign Template

Consider a postcard campaign that targets zip codes from where you typically see patients and introduce online check-in in your messaging.

Pro tip: If you are able to create a separate number to track the inbound phone volume, or create a separate landing page for patients to type into their browser or use in a paid search campaign, you can estimate the patient volume that can be directly attributed to this campaign.



Social Media Post & Image Templates

Consider a social media campaign that mentions digital check-in. If you don't already know which sites your audience is most likely to visit, you could start with Facebook and Instagram. Here are two samples to get you started but we recommend that you get creative and test different images and messaging.

Tactically, you can link them to a landing page that is dedicated to explaining check-in. We've provided custom artwork for you as part of your Launch Marketing Kit.

Sample Facebook posts

DASHin: We're excited to roll out our new and improved online scheduling and mobile check in! Book online today: [insert URL]

DASHconnect: All Your Practice patients now have access to messaging via email and text! Check out our mobile messaging today and look for more coming soon as you book appointments. [insert URL]

DASHself: All Your Practice patients can now schedule, change, or update your appointment information online from any device! Book online today: [insert URL]

Sample Instagram posts

DASHin: Check out our new mobile check-in to help make checking in for your appointments easy, safe, simple, and convenient from any device! Learn more about all of the ways we're making it easy for you to complete your paperwork ahead of time and check in before you arrive (Link in bio).

#mobilecheckin #checkinsolutions #easycheckin #weloveourpatients
[insert URL in profile]

DASHconnect: We've added patient messaging to make it easier for you to get appointment reminders, schedule appointments, and make changes from any device quickly! Learn more on our website (Link in bio).

#patientmessaging #patientsolutions #healthcaresolutions #weloveourpatients
[insert URL in profile]

DASHself: It's now easier to make your own appointment with your Practice Name provider. Schedule your own appointment without calling or emailing us from any device! Book your appointment today on our website (Link in bio).

#selfscheduling #patientsolutions #healthcaresolutions #weloveourpatients
[insert URL in profile]

Sample LinkedIn post - patients

DASHin: We're excited to roll out our new and improved online scheduling and mobile check in for all of our patients! Get more details and book online today: [insert URL]

DASHconnect: We're rolling out messaging for all Your Practice patients via email and text! Check out our mobile messaging today and look for more coming soon as you book appointments. [insert URL]

DASHself: All Your Practice patients can now schedule, change, or update your appointment information online from any device! Get details and book online today: [insert URL]

Sample LinkedIn post - referring providers

We're excited to roll out digital solutions to make it easier for all of our amazing Your Practice referring providers who entrust their patients with us to hand off a referral. Check out our new online solutions here: [insert URL]

Sample Twitter posts

INSERT SOCIAL IMAGES HERE

In-Office Promotion

We strongly encourage you to use in-office promotion such as a poster or placards to support a roll-out for DASHin. This creates excitement and curiosity, and encourages digital skeptics to consider using the online solution. Here's an example of a poster you can easily customize for your practice. We've provided poster artwork as part of your Launch Marketing Kit.