



Case study

# Optimize member engagement through a collaborative approach



A health plan supporting Medicare Advantage members in the northeastern United States selected Optum® HouseCalls to conduct comprehensive in-home assessments and help close gaps in member care.

The health plan initiated in-home assessments in 2020. Since inception, the HouseCalls program has met or exceeded the health plan's goals, and the health plan expanded the contract scope to serve thousands of more members across additional geographies. In addition to the scope expansion, the health plan wanted to find new ways to increase engagement, specifically program acceptance and visit completion rates.

When entering the third program year, the health plan closely partnered with Optum to review program performance and analyze membership data to help the health plan understand engagement trends and find opportunities to optimize the program further.

The consultative collaboration led to an opportunity to focus on engagement mechanisms for a specific subset of the health plan's population. Within this subset, some members were picking up the phone and engaging with HouseCalls scheduling coordinators but weren't inclined to schedule an in-home assessment. Armed with this intelligence, the health plan was eager to increase overall engagement and completion rates. The health plan asked Optum to explore strategies jointly to drive engagement.

## A tailored plan helps increase in-home assessments

Optum came to the table with a list of recommendations based on HouseCalls member engagement best practices. While one best practice was to increase call frequency, the health plan wanted to avoid a potential increase in member call attempts. The team continued to search for custom solutions.

## Optimizing the member experience from the first touchpoint and beyond

HouseCalls uses a variety of data-informed strategies, tactics and innovations to optimize engagement and member experience.

1

Personalized engagement experience that minimizes abrasion, maximizes engagement and uses members' preferred channel of communication



**Suite of AI and machine learning** to enable:

- Member segmentation
- Propensity to engage
- Tailored scripting and messaging
- Behavioral coaching tactics



**Health literacy review** to ensure clear language

2

Effective scheduling and outreach with multi-channel messaging to reach members at the right time via the right communication modality



**90%+**

of surveyed members satisfied with scheduling experience<sup>2</sup>



**77%**

of members accept in 7 or fewer call attempts<sup>2</sup>

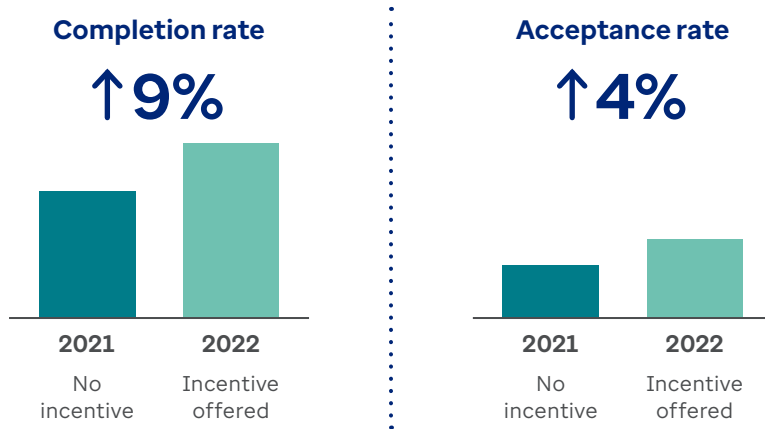
All of this leads to an overall **99% member satisfaction rate** and a **75 Net Promoter Score<sup>®1</sup>** with the HouseCalls program.<sup>2</sup>

The collective discussions also discovered this health plan's membership subset did not have an incentive in place for scheduling and completing in-home assessments. Optum shared consumer research suggesting that incentives can positively influence program participation.<sup>3</sup>

The health plan decided that providing an incentive would help members feel more inclined to accept and complete an in-home visit. A \$50 gift card was offered if members scheduled and completed a HouseCalls assessment during the 2022 program year. The offering was reinforced in the various engagement touchpoints used when reaching out to members to schedule the HouseCalls visit.

## Incentives can help increase completed visits

Success was measured by monitoring HouseCalls member acceptance rates and visit completion rates for the specific subset population year-over-year. By offering an incentive to schedule and complete an in-home assessment, the health plan members were more inclined to schedule and complete a HouseCalls visit.



Acceptance rate is the number of members who accepted the proposal to schedule a HouseCalls visit divided by the overall total count of members contacted to schedule a HouseCalls visit.

Completion rate is the number of members who followed through with the scheduled HouseCalls visit divided by the overall total count of members who scheduled a HouseCalls visit.

The program period was from March through December 2022.

When a health plan wanted to increase their in-home assessment completion rates across their HouseCalls eligible population, Optum collaborated with them to provide the best solution for the population. Through this strategic partnership and incentive offering, the tenured client realized a 9% increase in their visit completion rate and a 4% increase in their visit acceptance rate. The health plan continues to see the long-lasting benefits of a collaborative approach and partnership with Optum HouseCalls to increase member engagement as part of their in-home assessment program.



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## Optum consumer panel research results

A recent Optum consumer panel research study showcases the value in offering a member incentive.<sup>3</sup>



**68%**

of consumers feel receiving a small gift or an incentive for program participation is a “must have” or “nice to have.”



**65%+**

of HouseCalls members that have a gift card incentive in place stated it influenced their decision to schedule a HouseCalls visit in the following year.

**Find out how HouseCalls can help your plan achieve optimal member engagement.**

[optum.com/housecalls](https://optum.com/housecalls)

Sources:

1. Net Promoter, Net Promoter System, Net Promoter Score, and NPS are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.
2. Optum HouseCalls 2022 program data.
3. Optum consumer panel research study, 2020.