Consumer IQ Product Guide

The Consumer IQ package defines nine universal segments for healthcare consumers and applies them to our client's markets. The segments have been developed using demographic, socio-economic data and geographic data to understand key differentiating behaviors such as channel preferences and clinical needs. Clients can also apply these segments to their managed campaigns and list pulls to hone targeting criteria.

The deliverable includes a Tableau dashboard with nine tabs that allow you to understand the concentration of segments in your market, demographic and utilization trends within each segment and what strategies will work best for targeting individuals in each segment. Here is a brief description of each of the nine Tableau tabs:

1. **Segment Summary**
   - This dashboard provides the user with a quick summary of the nine WebMD Ignite consumer segments in their market
   - Each segment is represented in its own summary card with details on:
     - Description of segment
     - Size of segment in market
     - Payor Mix within segment
     - Median Income of individuals within segment
     - Average Age of segment
     - Gender Mix within segment

2. **Segment Comparison**
   - This dashboard allows the user to compare the nine WebMD Ignite consumer segments on key metrics to help inform marketing strategy:
     - Size of segment
     - Average Age
     - Gender - % Female
     - Marital Status - % Married
     - Presence of Children - % with Children
     - Digital Engagement - % with high digital engagement
     - Payor Mix - % Commercial / Medicare
     - % Patients
     - Average Household Value
     - Average number of Chronic Conditions
     - Primary Care Usage - % of total patients who utilize primary care services

- Entry Point - % of new patients that enter through the ED
  - Each metric is represented by its own chart; also included is the average across the entire population
    - This allows a user to see how each segment compares with the market in general as well

3. **Segment Profile**
   - This dashboard helps the user understand demographics and utilization trends within each segment
   - The dashboard has global filters for:
     - Segment
     - Age
     - Gender
     - Marital Status
     - Payor Category
     - Region
   - All charts and data within this dashboard are updated based on user selection of the filters
   - KPIs included in this dashboard are:
     - Size of Segment
     - Propensity for Primary Care usage
     - Average Annual Value of a Patient
   - Demographic trends included in this dashboard are:
     - Age
     - Gender
     - Median Household Income
     - Education
     - Financial Stability
     - Marital Status
     - Presence of Children
     - Ethnic Diversity
     - Digital Engagement
     - Household Attributes
     - Payor Mix
     - Top cities
   - Utilization Trends included in this dashboard are:
     - Relationship with Health System
     - Entry Points into Health System
     - Top Services utilized (by propensity of use)

4. **Market Overview**
    ○ This dashboard helps the users understand segment concentration by zip code in their market. This dashboard is intended to help you understand which segments are prevalent in which neighborhoods in your market
    ○ The dashboard has filters for:
        ■ Segment
        ■ Age
        ■ Gender
        ■ Marital Status
        ■ Payor Category
        ■ Region
    ○ There are 2 maps within this dashboard:
        ■ Segment Winner Map: A map to show which segment is the most prevalent in each zip code. The selections made through the filters on this dashboard do not apply to this visualization.
        ■ Market Heat Map: A map to show the distribution of individuals in the selected segment. All selections made through the filters on this dashboard apply to this map, and would update it.

5. **Entry Point Insights**
    ○ This dashboard provides insights on how new patients enter the health system and what happens after entry. Understanding how different segments travel through your health system can help inform both acquisition and retention strategies
    ○ The dashboard has filters for:
        ■ Segment
        ■ Age
        ■ Gender
        ■ Marital Status
        ■ Payor Category
        ■ Region
    ○ All charts and data within this dashboard are updated based on user selection of the filters
    ○ There are 6 mutually distinct entry points/access points used on this dashboard. These definitions are customizable and can be modified based on the client's definition.
        ■ Primary Care
        ■ Emergency Room

- Inpatient
- Clinic Outpatient
- Hospital Outpatient
- Urgent Care

○ There are 3 visualizations on this dashboard:
  - New Patient Entry Point: Percent of New Patients within the selected audience by each Entry Point. This chart also acts as a filter for the next 2 sections.
  - What happened next: Which access points did the selected audience use in their 2nd, 3rd and 4th visits
  - Entry Service Lines: What services did selected audience use on their first visit
○ Selecting an entry point in the New Patient Entry Point visualization can help us understand trends and insights specific to that entry point for the selected segment

6. **Service Line Insights**
   ○ This dashboard provides insights on the specialty services usage within a health system's population. Understanding the top services and combinations of services can help guide decisions on messaging and tone.
   ○ The dashboard has filters for:
     - Segment
     - Age
     - Gender
     - Marital Status
     - Payor Category
     - Region
   ○ There are 2 visualizations on this dashboard:
     - Top Services Utilized: Shows the top services utilized by patients in the selected segment(s). This visualization also acts as a filter to the next chart on this dashboard.
     - Top Service Line Combinations: Shows the top services utilized in combination with the service line selected in the Top Services Utilized chart. While the service lines are listed in descending order of occurrence, the color of the bars shows which service line combinations had the highest per-patient value.

7. **Value Insights**

○ This dashboard provides detail on per-patient and household value from the different segments in your market. This would help understand which segments drive the most value for your health system and help with marketing prioritization.
○ The dashboard has filters for:
  ■ Segment
  ■ Age
  ■ Gender
  ■ Marital Status
  ■ Payor Category
  ■ Region
○ There are 2 visualizations on this dashboard:
  ■ Household Value Lift by Segment: This chart shows the average 24 month patient and household value for each segment in the market. It also highlights the lift in household value from individual value. Segments with a high household value lift are more likely to have strong household relationships with your health system.
  ■ Average 5-year Patient Value: This chart shows how average patient value has increased year over year for the most recent 5 years for the selected segment, hence highlighting the long term value of any acquisition efforts for that segment.

8. **Segment Ranking Analysis**
   ○ The Segment Ranking Analysis dashboard leverages four factors to create a ranking of the 9 Consumer Segments to allow for prioritization of the segments to identify market opportunities. The dashboard allows you to select your inputs for four key factors:
     ■ Service Line : To identify segments that show the highest propensity for a particular service line
     ■ Access Point : To identify segments that show the highest propensity for ED, Inpatient or Primary Care
     ■ Channel : To identify segments that have a high percentage of individuals that are likely to respond to specific campaign tactics
     ■ Value : To identify segments that are likely to drive high individual or household value
   ○ The dashboard uses standard deviation scores to generate a Combined Ranking of the consumer segments by integrating the ranks from each of the four factors above.

9. **Marketing Guide**

- ○ The Marketing Guide dashboard can be viewed as a handbook for segments in your market. It evaluates the selected segment on some key metrics and makes recommendations for:
  - Channel preferences: Which channels would result in maximum engagement from the selected segment
  - Messaging: What services are individuals in selected segment looking for, and what they will be most likely to respond to
  - Creative: How can we tailor marketing creative to connect with our audience
  - Segment prioritization: How does the segment perform within your market and health system

Data Sources

- Consumer data is sourced from the Epsilon market list
  - ○ This includes consumer demographics such as age, gender, zip code, payor category, and marital status
  - ○ This may also include lifestyle identifiers, including if they are a frequent mobile user, and Niches segment information
  - ○ These consumers are householded and include other household information such as household income range, presence of children and financial stability
  - ○ Market list information is not available for children

- Patient data is sourced from the client's EMR records
  - ○ This includes visit details such as date of visit, encounter type, facility, associated reimbursements and costs
  - ○ Also included is MSDRG, Diagnosis Code and Procedure Code information. WebMD Ignite uses these to categorize visits into their standard Service Lines and Sub-Service Lines
  - ○ Provider information is useful to determine primary care usage within the health system