

# How Verato UMPI™ powers healthcare CRM

Ensure you're getting the most out of your CRM with a complete, trusted view of your customer

## The challenge

Consumer expectations are changing, and healthcare organizations are adjusting to meet those expectations. For most healthcare organizations, that means investing in customer engagement and relationship management technology, such as a CRM. These solutions are designed to help healthcare organizations support the changes needed to address the modern healthcare consumer.

CRMs are a game-changer for healthcare organizations, allowing them to better analyze their population, enhance communication with consumers, and improve marketing efforts. However, new technology always comes with a set of new challenges.

One major challenge organizations that implement CRMs face is achieving consistent consumer identity across all systems, including ones focused on care, like an EMR, and those focused on engagement, like call centers and portals. Having a trusted, accurate, complete view of consumers across the board is vital for healthcare organizations to provide quality care and experiences.

## A client success story

A large health system in the Southwest with 27 hospital locations has a goal of a completely connected consumer experience by 2026.

To connect the consumer journey, they need to keep consumers' identities consistent across every touch point. The organization has many systems generating and maintaining consumer data, including Salesforce® and their EMR, Epic®. It wasn't optimal to leverage their clinical systems to establish identity, and Salesforce was challenged to resolve the identity data within Epic.

"Verato UMPI has helped us to fill gaps in information. With Verato, we easily integrate data and we're confident in our consumer 360 view," says a Vice President of Data Integration and Analytics. Supported by Verato, their warehouse connects information from 40 data sources.

With Verato, employees across the health system can access the right information more quickly, enabling more streamlined scheduling, marketing, and consumer experience.



**verato**

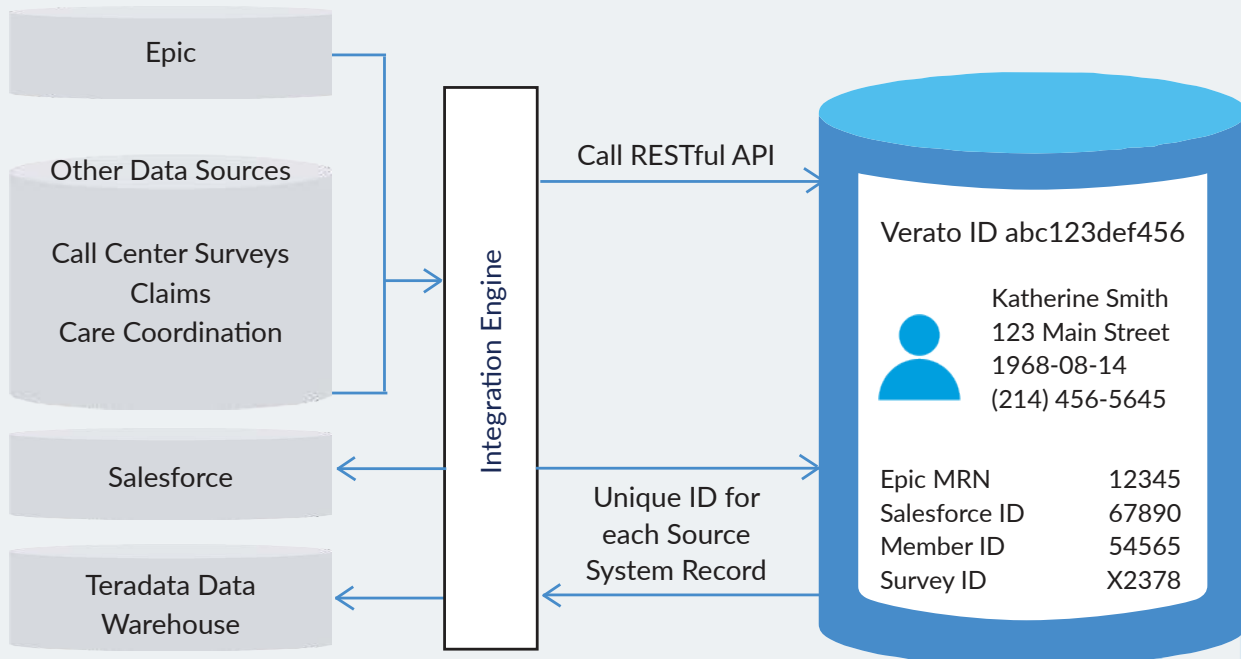
[verato.com/products/universal-mpi](https://verato.com/products/universal-mpi)

## The solution

Verato UMPI powers a complete and accurate view of consumers by linking the patient data in your EMR and other traditional sources, to that in your CRM data, along with other key demographic information from third parties or additional sources. As a cloud solution with revolutionary Verato Referential Matching® technology, Verato UMPI easily pairs with a wide array of your systems to ensure data originating from events or campaigns can correctly be associated to patient data, answering the fundamental question of CRM: where are these consumers coming from, and why?



### Verato UMPI consumer view



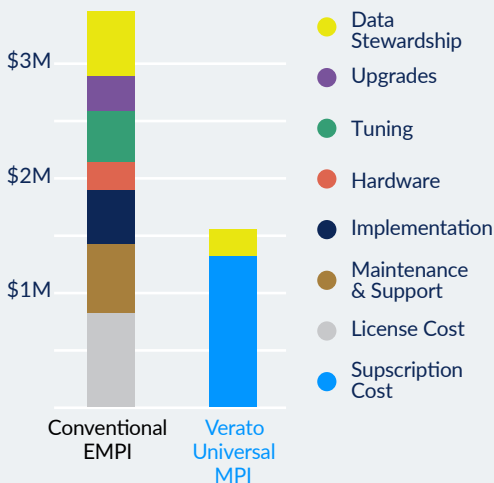
## Ideal matching technology to support diverse data sets

Verato uses a powerful new identity matching technology, Verato Referential Matching<sup>®</sup>. Conventional matching technologies directly match the demographic data from two customer records to see if they belong to the same person. Verato, on the other hand, matches that demographic data to its comprehensive and continuously-updated reference database. This database contains over 300 million identities spanning the entire U.S. population, and each identity contains a complete profile of demographic data spanning a 30 year history. By matching records to this database in addition to each other, Verato can make matches that conventional EMR/CRM technologies could never make – even if two member records have demographic data that is out-of-date, incomplete, incorrect, or different. This approach is optimal when looking to integrate all sources of consumer data for consumption inside a CRM solution given the wide variation of attribute quality and completeness between lead, consumer, and patient data. Unifying data from your EHR and from other sources enables a complete view for your CRM.

Patient A	Verato Reference	Patient B
NAME	NAME	NAME
Katherine Smith	Katherine Smith	—
—	Kathy Smith	—
—	Katherine Jones	Katherine Jones
DOB	DOB	DOB
1968-08-14	1968-08-14	—
SSN	SSN	SSN
—	456-78-9012	456-78-9012
PHONE	PHONE	PHONE
(214) 456-5645	(214) 456-5645	—
—	(815) 987-4567	(815) 987-4567
ADDRESS	ADDRESS	ADDRESS
—	200 S Madison St.	200 S Madison St.
—	200 Madison Street	—
123 Main St.	123 Main St.	—

Both match to the same reference record, therefore they match to each other.

### Four-year total cost of ownership 4 million unique patients

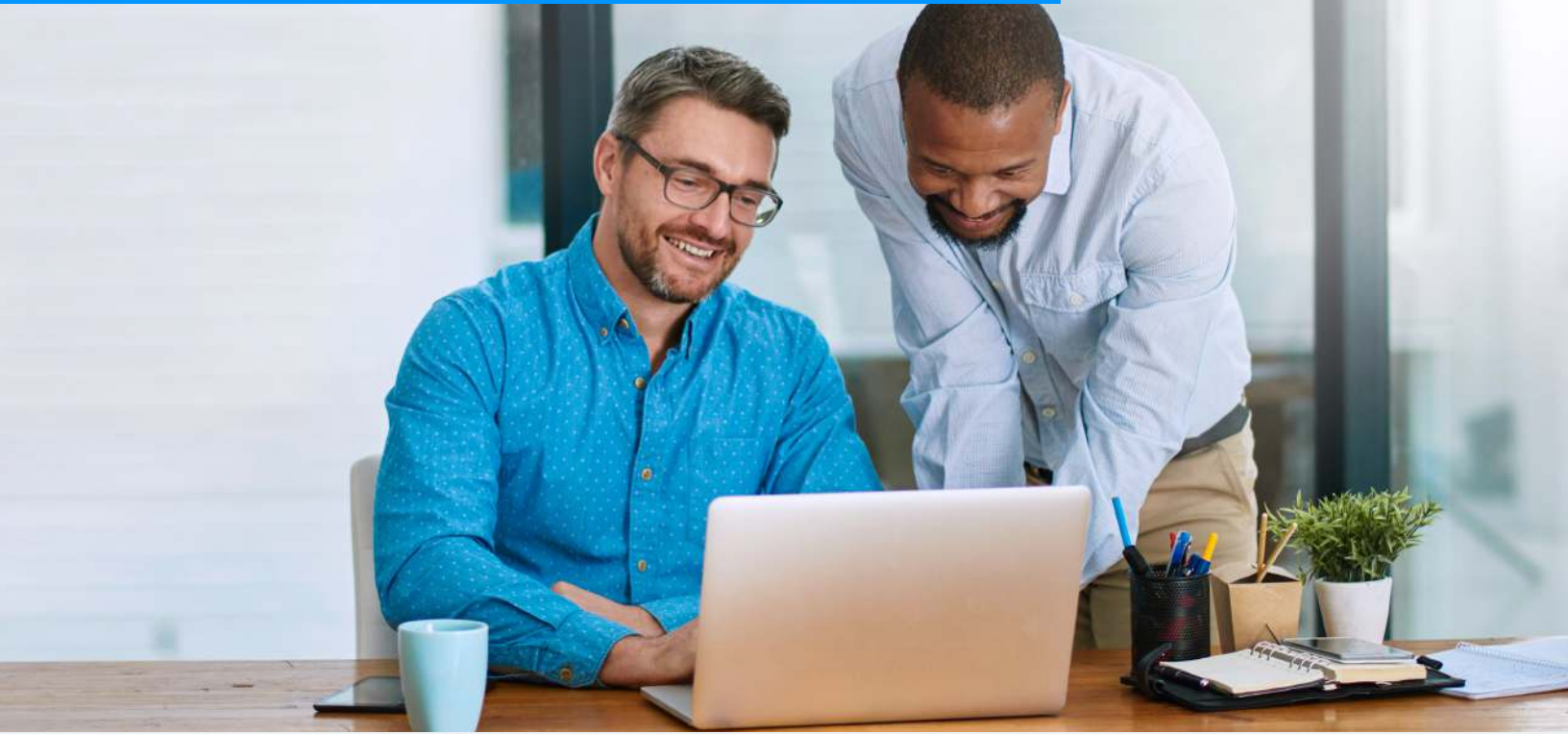


### A secure, scalable, and cost-effective SaaS solution

Verato UMPI is a HIPAA-compliant and HITRUST-certified SaaS solution that can be implemented in as little as six weeks and scale to hundreds of millions of identities with sub-second response times.

Because it is a SaaS solution, there is no software to install, no hardware to deploy, no upgrade costs, no maintenance costs, and no implementation costs. This approach is proven to work alongside industry CRM solutions from Salesforce to Microsoft. And because its matching is so comprehensive, there are no algorithmic tuning cycles and 50-75% fewer stewardship items requiring manual review. Over four years, Verato UMPI typically has a 2x-3x lower total cost of ownership (TCO) compared to conventional consumer matching technologies, including those embedded inside EMRs or as standalone such as traditional mastering solutions.

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## The Verato difference



### Most accurate

Powerful Referential Matching technology significantly outperforms traditional approaches.



### Easiest to implement

Go live in as little as six weeks. Modern APIs. No tuning. Just plug in.



### Most secure

HIPAA compliant and HITRUST certified. Also SOC 2 Type 2 certified.



### Most cost-effective

Typically 2x-3x lower total cost of ownership (TCO) over four years. Save millions.

Verato, the identity experts for healthcare, enables smarter growth, improved care quality and efficiency, and better population health by solving the problem that drives everything else — knowing who is who. Only the Verato HITRUST-certified, next generation cloud identity platform enables interoperability across the complex digital health ecosystem with unprecedented accuracy, ease, and time-to-value.

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