



A&M Clients On: Digital Transformation

10 Questions with Banner Health CMO Alexandra Morehouse

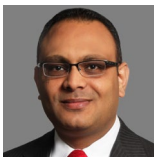
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We sat down with Alexandra Morehouse, Chief Marketing Officer at Banner Health to talk about our work with Banner on its digital transformation initiative. Alex played a critical leadership role in driving Banner's transformation and shared her take on the process, lessons learned, and how the initiative positioned Banner to continue serving their customers and communities during the COVID-19 pandemic.

A&M: What brought you to Banner Health?

Alex: Banner Health's board and executive leadership wanted to change their operating model to put patients at the center and treat them more as traditional consumers than as bodies to treat and release. They wanted a leader who could navigate that transition in a consumer facing industry and found my experience at Schwab, AAA and also Kaiser extremely relevant to what they wanted to accomplish.

A&M: What interested you in Banner Health?

Alex: In terms of consumer engagement and experience, I knew healthcare was about 5-10 years behind other industries I've worked in. What we would be doing, in some ways, would be industry leading. They had the top-level commitments from the CEO and board members to make the necessary changes, and they understood the obstacles they would need to overcome to be successful. The challenge and their commitment compelled me to make the change and join the Banner team.

A&M: How did you get started?

Alex: First, we needed to understand our customers better: who they are, what they wanted from an organization like ours, how we could make their experience more seamless and easy. With the help of a strategy firm, we completed a Voice of the Customer survey of over 3,000 Banner Health customers. The survey revealed common themes based on a customer's demographic data and the types of services they consumed.

A&M: And how did you use those themes to make progress?

Alex: To understand our broadest set of customer needs, we settled on a single persona, Sophia, who represents a young mother, who is the care coordinator and advocate for her family, which includes her young children and ailing parents. We knew if we could build services to engage and delight Sophia, we would be able to address the needs of the majority of our customers.

A&M: What next?

Alex: We started working with our CIO to look at what tools we needed and began consolidating our disparate call centers to provide a more unified consumer experience for common activities like scheduling appointments and renewing prescriptions. It became evident we would need more structure and support to secure and manage the significant investment required to truly transform customer experience. We reached out to A&M to help us develop the business case that would define the effort and win CFO and board support.

A&M: Why A&M?

Alex: I had worked with a few A&M partners in my former life at Schwab, and we kept in touch. We met and it became clear how they approach work differently than traditional consulting firms. Their people are a combination of leaders with strong operational backgrounds, in this case a former CIO and CTO of Schwab, and world class consultants. This combination uniquely equips them to solve complex, high impact business problems with tailored, client-specific solutions. It was an easy decision to hire people I trusted who worked for a firm uniquely qualified to help me solve my problem.

A&M: How did A&M help?

Alex: I needed to build a business case that supported a large scale, multi-year digital transformation initiative that demanded significant investment, but also promised significant ROI in the desired timeframe. A&M's ability to analyze and build a specific ROI model for this type of initiative and create a package and narrative that could convince our board to invest is not something that most other firms could do in the timeframe and manner I needed. They also helped clarify our priorities and sequence the workstreams that would define our transformation program.

A&M: What did you do next?

Alex: With the leadership-approved business case in-hand, we launched the first set of workstreams. To enable our call center team, we finalized a license for Salesforce's HealthCloud product and selected an integrator to help us implement the solution. Additionally, we began the process to select the tools and resources to do two things: 1) Organize and manage all of the data flowing from multiple sources into our new "Digital Front Door" platform and 2) Marketing tools to enrich our consumer experience and engage more directly with them by providing suggestions on relevant Banner services based on their particular characteristics.

A&M helped run the selections and negotiate contracts with software vendors and integrators, including our CRM, which saved us millions of dollars in licensing and maintenance fees. Recognizing we did not have the right cross functional team and processes in place to hold our own teams and the vendors accountable to scope and budget, A&M helped us define and stand-up the initiative's program management, running us through the process for the first few cycles until our own resources could get up to speed and keep it moving on their own.

A&M: What is the relevance of Banner's "Digital Front Door" in the context of our current global pandemic?

Alex: In the midst of the COVID outbreak the work that A&M did could not possibly be more relevant or vital. The "Digital Front Door" has been critical in cascading breaking news, testing, local legislative decisions, all the information we need to push out not only to the public, but also to our patients and employees. And we are so grateful that A&M helped us build and elevate this service so that we could provide it to everybody whom we serve.

Contact us to discuss how A&M can help with your digital transformation.

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Companies, investors and government entities around the world turn to Alvarez & Marsal (A&M) for leadership, action and results. Privately held since its founding in 1983, A&M is a leading global professional services firm that provides advisory, business performance improvement and turnaround management services. When conventional approaches are not enough to create transformation and drive change, clients seek our deep expertise and ability to deliver practical solutions to their unique problems.

With over 8,500 people providing services across six continents, we deliver tangible results for corporates, boards, private equity firms, law firms and government agencies facing complex challenges. Our senior leaders, and their teams, leverage A&M's restructuring heritage to help companies act decisively, catapult growth and accelerate results. We are experienced operators, world-class consultants, former regulators and industry authorities with a shared commitment to telling clients what's really needed for turning change into a strategic business asset, managing risk and unlocking value at every stage of growth.

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