

**CASE STUDY**  
for Health Plans and Payers

# How TriHealth Used Member Segmentation to Customize Outreach

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Using psychographic segmentation to go beyond simple outreach

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# Overview

## The challenge

Health plans have historically struggled to effectively communicate with members. Members often ignore plan outreach whether it be via phone, email, or paper mail. This lack of engagement can lead to low plan NPS, and even worse, poor health outcomes and high medical spend.

## The organization

TriHealth is an integrated delivery network based in Cincinnati, Ohio. It is the fourth largest employer in the city of Cincinnati, with over 12,000 employees. Their Corporate Health division serves TriHealth employees as well as other regional employers in industries such as manufacturing and school systems. TriHealth provides coverage and care to improve the health and productivity of companies' employees and their dependents.

## The approach

TriHealth segmented their membership base into five distinct groups by partnering with PatientBond to use its proprietary psychographic segmentation model. Based on this knowledge, TriHealth now works with PatientBond to tailor the content of their messages and adjust delivery methods based on which psychographic segment the member falls into.

## The results

Initial results from TriHealth's partnership with PatientBond have been impressive. In the first year, TriHealth saw a 10% increase in member behavior change as well as financial savings. Not only were TriHealth's members satisfied, but their health coaches also felt more engaged and satisfied in their work.

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# Approach

## How TriHealth uses psychographic segments to customize member outreach

Health plans have a treasure trove of member data but often don't know how to use it to customize the member experience. TriHealth was in this situation and wanted to use their member data to change member behavior and improve overall member health outcomes. To achieve this goal, TriHealth partnered with PatientBond, a digital patient experience vendor that uses a proprietary psychographic segmentation model and digital outreach to improve patient engagement, reduce risk, and lower costs.

TriHealth worked with PatientBond to improve their health and wellness coaching service and piloted it on three diverse organizations (encompassing 210 patients) within their employer market. PatientBond segmented TriHealth's members into five distinct groups to equip TriHealth's health coaches with tailored member profiles.

### The two main steps

**01** Segment members using psychographics

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**02** Train health plan staff to create tailored scripting

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# 01 Segment members using psychographics

TriHealth health coaches help members with specific disorders, such as diabetes or musculoskeletal disorders, form healthy habits. For example, a member with diabetes needs to develop the habit of testing their A1c levels regularly. But TriHealth found that many patients were inconsistent with their newly formed habits.

Creating sustained behavior change in members can be very difficult, but doing so can provide great health benefits to members and large cost savings for plans. Therefore, TriHealth worked with PatientBond to determine their members' individual motivators through psychographic segmentation.

## What are psychographics?

Psychographics are the classification of people according to their attitudes, values, interests, motivations, and other psychological criteria. Segmenting people by these characteristics allows organizations to target and deliver communications that resonate more effectively and increase the likelihood of behavior change.

This can be more effective than using only demographic data because one must understand the “why” to resonate with a consumer’s motivations and unarticulated needs. Marketers in other industries, especially retail consumer goods, have been using psychographic segmentation for decades already.

*Psychographics in health care encompass attitudes and behaviors regarding:*

- Health and wellness
- Roles of health care professionals
- Insurance
- Health conditions
- Reactive vs. proactive health care behaviors
- Willingness
- Current health conditions
- Rx and OTC medications



2. SEGMENT MEMBERS USING PSYCHOGRAPHICS

TriHealth gave PatientBond the names and addresses of their members using data from three employers (a school system, a large manufacturing organization, and TriHealth Health System). These organizations were already using health coaches, which made their employees great candidates for this pilot program. From this information, PatientBond uses proprietary consumer data to segment members into the five psychographic segments detailed below

**PatientBond’s psychographic segments**

*Percentage of prevalence in the general population*



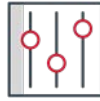
**Direction taker**  
15%

- Deeply trust health care providers
- Will visit their doctor at first sign of issue



**Balance seeker**  
17%

- Wellness-oriented with self-defined success
- Open to ideas and options



**Priority juggler**  
18%

- Busy with things other than health
- Reactive to personal health but proactive with family health



**Self-achiever**  
19%

- Proactive, driven by appearance, and task oriented
- Very likely to use virtual care options



**Willful endurer**  
31%

- Self-reliant and resilient
- Only visit doctor when necessary

PatientBond was able to attribute members to one of these segments with 70% accuracy based off the member’s name and address alone. **TriHealth then took the process a step further by surveying members with PatientBond’s 12-question quiz.** The quiz takes 90 seconds and increases segmentation accuracy for members who take the quiz to 91%.

Interestingly, TriHealth’s population differs from the general population. While for the entire country, “willful endurers” are the most common segment, for TriHealth’s members, “balance seekers” and “self-achievers” were the most common.

# 02 Train health plan staff to create tailored scripting

Once PatientBond provides TriHealth with their members' psychographic segments, TriHealth inputs the psychographic group into member online profiles that health coaches can access. Health coaches can now adjust member outreach scripting accordingly.

TriHealth trained their health coaches about the different segments, and the health coaches were eager to learn more about the members they were responsible for. Health coaches found that the psychographic insights were "energizing." They became even more attentive to their patients as they tried to pick up on clues based on the key words and triggers PatientBond provided for each segment population.

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We used to speak to all members with diabetes in the same way—treating them all as diabetics—but now, we're able to speak to them in five different ways based on who they are beyond their disease.

**Terri Hanlon-Bremer, Senior Vice President, Employer Solutions and Population Health**

TriHealth Corporate Health

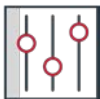


### 3. TRAIN HEALTH PLAN STAFF TO CREATE TAILORED SCRIPTING

The training culminates in a role-modeling practicum in which health coaches can show that they have mastered the content and can customize outreach based on psychographic segments.

Below are example outreach messages that health coaches could create for members with diabetes based on their psychographic segment.

#### Example scripting for members with diabetes based on psychographic segments



##### Priority juggler

*Proactive with family health*

“Not only can smoking negatively effect your insulin levels, but secondhand smoke can also increase the risk of a loved one developing diabetes as well.”



##### Balance seeker

*Open to ideas and options*

“If you’ve struggled with dieting and exercising, reducing stress and increasing water intake are other great alternatives to lower blood sugar levels.”



##### Direction taker

*Deeply trusts health care providers*

“One study found people with diabetes who walked at least 2 hours a week lowered their risk of developing heart disease by 40%.”



# Results

After TriHealth started using psychographic segmentation, one of their employer organizations saw 83% of their participating members make substantial progress on their health goals.

This organization also saw a 28% reduction in at least one “risk” in participants (for example, reducing BMI, lowering A1c levels, decreasing blood pressure, increasing physical activity, etc.).

In addition to the financial achievements, TriHealth was able to cut down time spent connecting with the member and spend more time coaching their members instead, forming more meaningful relationships.

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## 27%

Increase in program satisfaction at a single employer

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## \$621K

Savings in a single year at a single employer

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## 5:1

ROI for the three employers participating in the TriHealth program

ADDITIONAL CASE IN BRIEF

## AmeriHealth Caritas DC

*100K-member Medicaid plan*

### How AmeriHealth Caritas DC used psychographics to increase telehealth registration

AmeriHealth Caritas DC (AmeriHealth) used PatientBond’s psychographic segmentation model, this time to increase telehealth utilization. AmeriHealth found that many members were utilizing the emergency department (ED) for non-emergencies rather than an urgent care center, a PCP, or telehealth.

Using psychographic segmentation, PatientBond (on behalf of AmeriHealth) created an automated outreach campaign for telehealth. This tailored messaging was used in text messages, call center representatives’ scripts and automated interactive voice calls to AmeriHealth members. The campaign’s goal was to get members registered for virtual visits so that when they do need care in the future, it is easy for them to schedule a virtual visit.

### Psychographic distribution of AmeriHealth members vs national population



	Direction takers	Balance seekers	Priority jugglers	Self-achievers	Willful endurers
AmeriHealth members	3%	6%	14%	35%	42%
National Medicaid population	19%	10%	10%	20%	41%

AmeriHealth saw a 7% conversation rate (members who saw the message and registered for telehealth services), leading to a **7.5x increase** in telehealth registrations. Also, members did not see these messages as a nuisance, as evidenced by the fact that AmeriHealth’s SMS unsubscribe rate stayed below 2%.

It’s important to note that although this partnership began before the Covid-19 pandemic, AmeriHealth has continued this tailored outreach for other campaigns.

Source: "Increasing Telehealth Registrations for Members of AmeriHealth Caritas District of Columbia: A PatientBond Case Study," PatientBond, <https://insights.patientbond.com/amerihealth-case-study?hsCtaTracking=4979755b-ddd2-445a-9d3f-2d36d6e07e4a%7C121d5871-0cca-4504-94e0-15a66ed43dd6>.

# Next steps

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