

A Strategic Guide for Turning **Analytics into Action** for Effective Member Outreach

Health plans today face a major challenge. They either have access to analytics without a clear way to act on them or rely on engagement tools that lack the clinical and administrative data needed for meaningful outreach.

It's one thing to know your goals for a specific group of people but actually reaching them requires the right strategy and data. Without a focused approach, chances to break down barriers to care, improve member experiences, and support better long-term health can be lost. Even with valuable data, missing the right moment for early intervention can cause outreach efforts to fall short, wasting resources and failing to connect with the people who need help the most.

The key to improving long-term health outcomes and member satisfaction lies in seamlessly integrating analytics with a dynamic, empathetic outreach team, and year-round engagement programs.

At the same time, analytics alone isn't enough to create real change.¹ Without a way to turn insights into action, even the most advanced data models end up sitting on the shelf. And when engagement lacks precision, it leads to generic outreach that doesn't connect with members or motivate them to take action. Delayed access to care is associated with a 17% higher rate of avoidable hospitalizations², underscoring the direct impact that access barriers have on health outcomes. These challenges disproportionately affect vulnerable populations, further widening health disparities.

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In this guide, we'll explore:

- ① A deep dive into the current **challenges in member outreach** and why digital-only solutions fall short
- ② Data-backed insights on the **importance of proactive engagement** and why phone outreach remains a critical tool
- ③ A framework for **integrating analytics with real-world engagement** to ensure members receive the care they need

By bridging the gap between insights and action, healthcare organizations can transform engagement strategies from reactive to proactive—ensuring that every interaction is timely, relevant, and impactful.

Why Digital-Only Member Outreach Solutions Fall Short

Most healthcare interactions still rely on real human connection. Digital tools, like automated appointment reminders or chatbots, are helpful for basic tasks. However, they can't replace a real conversation when things get more complicated. Sometimes people need more than just an automated response especially when they are looking for answers. Whether someone is trying to understand their insurance, manage a chronic condition, or coordinate care for a loved one, these situations can be overwhelming. In those moments, nothing beats talking to a real person who can listen, provide guidance, and offer the reassurance they need.

DID YOU KNOW?

50%

of healthcare consumers say a **single bad digital experience** can ruin their entire healthcare experience?³

Why are these calls so effective? Because they offer something digital tools can't: a personal touch. When a live person reaches out, they can listen, answer questions, and provide empathetic support—all in a way that feels natural and trusting.

These calls are particularly impactful because they:



Create a personal connection:

A live conversation fosters trust and makes members feel valued.



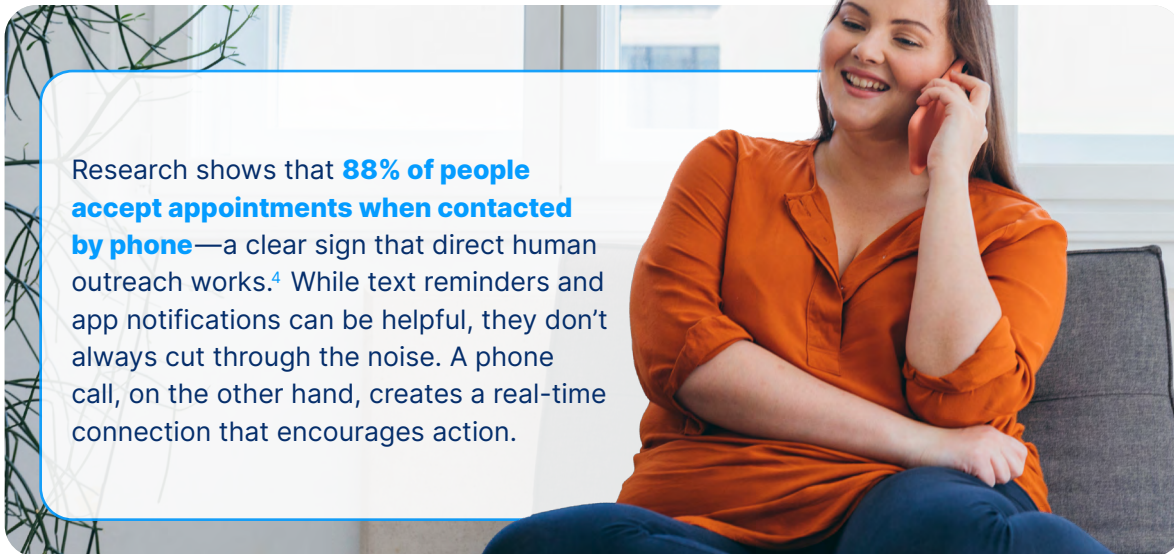
Encourage immediate action:

A direct call makes it easier for members to confirm an appointment, ask follow-up questions, and discuss next steps.



Support vulnerable populations:

Older adults, people with disabilities, and those managing multiple conditions may struggle with digital tools. A call ensures they receive the care they need.



Research shows that **88% of people accept appointments when contacted by phone**—a clear sign that direct human outreach works.⁴ While text reminders and app notifications can be helpful, they don't always cut through the noise. A phone call, on the other hand, creates a real-time connection that encourages action.

Where Analytics Comes In: Turning Calls into Meaningful Conversations

Outbound calls are powerful, but they become even more effective when paired with data-driven insights. Without analytics, outreach efforts can be generic, missing key opportunities to personalize interactions and drive action. When health plans use analytics to shape their outreach strategy, they can make a bigger impact by:



Prioritizing high-risk members

Using analytics, health plans can identify members who are overdue for care, at risk for hospital readmission, or struggling with medication adherence.



Tailor messaging

By analyzing past interactions, social determinants of health (SDOH), and claims data, outreach teams can personalize conversations to address specific member needs such as transportation issues or language barriers.



Optimize timing and frequency

Data can determine a member's preferred outreach channel and when members are most likely to answer calls and engage in meaningful discussions. This helps to improve contact rates and reduce outreach fatigue. Our Care Navigators outreach to members in their native language and leverage connection rate analytics to identify the days and times that result in the highest connection rates (e.g. midday for retirees and evenings for working professionals).



Improve outcomes with proactive engagement

Instead of waiting for members to reach out with issues, analytics can help plans intervene earlier, guiding members to preventive services such as screenings and annual wellness visits.



Streamline outreach and reduce abrasion

Member abrasion is a top concern for health plans. Our Care Navigators can address multiple needs in a single call by incorporating member benefits and SDOH resources directly into their scripting.




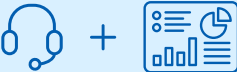
Engage hard-to-reach populations

ReferWell typically works with clients' unengaged member segments to deliver compelling results.

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WHERE ANALYTICS COMES IN: TURNING CALLS INTO MEANINGFUL CONVERSATIONS (CONTINUED)

When health plans blend the personal touch of outbound calls with data-driven insights, they can boost engagement, improve health outcomes, and make sure members get the support they need right when they need it.

Scenario	Member Identified	Call Approach	Member Response	Outcome
<p>Member Outreach Without Analytics</p> 	<p>A health plan calls a random list of members to remind them to schedule their annual wellness visit.</p>	<p>A generic script is used, offering little personalization. The agent simply asks if the member would like to book an appointment.</p>	<p>The member is unsure if they need the appointment and declines to schedule, feeling the outreach is impersonal.</p>	<p>Low engagement, missed care opportunities, and a lack of follow-through.</p>
<p>Member Outreach With Analytics</p> 	<p>Using predictive analytics, the health plan identifies members overdue for care, prioritizing those at higher risk based on claims history, chronic conditions, and social determinants of health.</p>	<p>The agent tailors the conversation, referencing the member's health history (e.g., 'We see you're due for a diabetes screening'). The message is relevant and specific to the member's needs.</p>	<p>The member appreciates the proactive approach, understands the importance of the visit, and books the appointment.</p>	<p>Higher appointment rates, improved health outcomes, and a more engaged member population.</p>

From Insights to Action —Driving Better Outcomes

Turning analytics into action requires more than just data—it demands a strategic engagement approach that prioritizes personalization, trust, and timely intervention. While digital tools are advancing rapidly, healthcare remains deeply personal. Members need human interaction, especially when making important health decisions.

By combining predictive analytics with effective outreach, health plans can:

- Identify and prioritize high-risk members
- Personalize outreach to increase engagement
- Reduce care gaps and improve outcomes

However, achieving this at scale requires the right tools and technology—and that's where ReferWell comes in.



How ReferWell Helps Health Plans Drive Real Results

For health plans, success isn't just about collecting data—it's about acting on it in a way that drives real engagement and better health outcomes. By pairing predictive analytics with personalized outreach, ReferWell helps plans close care gaps, boost quality metrics, and improve member satisfaction.

With the right strategy and technology in place, better engagement—and better health—is within reach.



Seamless Scheduling That Turns Intent into Action

Many outreach programs stop at awareness—ReferWell ensures members actually schedule and complete their appointments. Our Advanced Scheduling Platform eliminates barriers to access, making it easy for members to take the next step and close care gaps efficiently.



Concierge-Level Care Navigation for a Personal Touch

For many members, navigating the healthcare system is overwhelming. ReferWell's empathetic Care Navigators personally guide them through the process, proactively rescheduling missed appointments, addressing obstacles like transportation or cost concerns, and ensuring they get the care they need—without unnecessary complexity.



Comprehensive, Year-Round Care Programs That Drive Engagement

Engagement isn't just about one call—it's about ongoing support. ReferWell doesn't just remind members about their care; we track, coordinate, and manage their health journeys. Whether it's risk adjustment follow-ups, chronic condition management, or CAHPS improvement, our programs ensure better outcomes and measurable ROI for health plans.



By combining the power of analytics with personalized outreach, ReferWell drives stronger member engagement, lowers costs, and fosters a healthier, more satisfied population.

Learn more about ReferWell's
Member Engagement and
Care Access Programs





referwell.com | sales@referwell.com | (800) 970-5875

SOURCES

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