

## Using Invoca Call Tracking & Analytics to Boost Conversions and Create Marketing Efficiencies

### Results at a Glance

**580%**

increase in  
appointments  
scheduled

**40**

employee-hours  
saved per week

University Hospitals first tapped Invoca to increase appointment scheduling rates and get more insight into marketing spend effectiveness. Now, it wants to use the solution everywhere it can.

## THE MISSION

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University Hospitals, founded in 1866 and based in Cleveland, Ohio, is one of the leading healthcare providers in the United States. It has more than 200 locations, with 18 different hospitals, 55 health centers and about 30,000 employees. University Hospitals receives more than 400,000 calls per month—and making sure patients can connect with the right doctors and facilities is an ongoing imperative for the nonprofit organization.

One of University Hospital's current goals is to create a more seamless journey for patients, from the moment they start researching symptoms or doctors to billing to follow-up care. A critical part of the patient journey is, of course, appointment scheduling. Also a top priority, is the overall experience that patients have with the University Hospital brand, including through its marketing efforts.

"In healthcare, a phone call, including one driven by a marketing campaign, isn't just a phone call," said Noah Brooks, manager of analytics and strategy at University Hospitals. "We have a responsibility to make sure that when patients call, they get the information and care they need, right when they need it. That responsibility includes using better technology to create a better patient experience, which is why we implemented Invoca."

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Noah Brooks,  
manager of analytics and strategy



## THE CHALLENGE

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University Hospitals had faced significant limitations with its previous call tracking solution. “We didn’t have much insight,” said Brooks. “It was really difficult to tie a specific appointment or a patient to marketing spend or to different efforts that we had in the market. It was a manual and after-the-fact process, which meant we couldn’t make changes on the fly to turn off what isn’t working and amplify what is. And it was basically impossible to track phone calls and determine which ones had turned into appointments.”

Twelve of the full-time employees in University Hospitals’ marketing group were each devoting several hours per week to listening to phone calls, manually marking calls that turned into appointments, and documenting what transpired during each call. “This process wasn’t efficient or accurate,” said Brooks. “It was also costly.”

Also, University Hospitals had to use conversion proxies like call duration to correlate to marketing performance, said Brooks. “We had basically said that any call over two minutes counts as a conversion,” he explained.



“Implementing Invoca at University Hospitals was one of the biggest wins of our department in 2018, and it gave us the data needed to significantly improve performance.”

## THE RESOLUTION

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Brooks had recommended Invoca to University Hospitals based on his previous experience using the solution. However, while his team was quick to understand the value of the platform, the call center team was initially hesitant to implement it. But that changed once they learned what insights they'd get from Invoca.

"We told them that we'd be able to give them recordings and data that would help highlight the issues they'd been struggling with, such as being understaffed or not having the correct tools to send callers to the right place," said Brooks, adding that the fact Invoca is HIPAA-compliant made everyone feel comfortable about transitioning to the platform.

The ability to tie scheduled appointments to marketing performance in real time with Invoca and Signal AI has "changed the direction of marketing" for University Hospitals, according to Brooks. "Rather than saying, 'This ad drove 10,000 clicks,' we can now say, 'This ad drove 500 appointments, and those appointments went to these specific doctors or locations,'" he said.

Invoca helped Brooks and his team discover something else — that the two-minute metric they'd been using to count conversions was meaningless. "After we implemented Invoca and started recording and analyzing calls, we realized a two-minute call is not a conversion," he said. "In fact, it was highly unlikely that someone would even answer the phone in two minutes."

### **Greater ability to ensure a consistent call experience**

University Hospitals' call center team now uses Invoca to track performance and monitor call quality. They also measure whether their staff stays on script during calls with patients. That was a problem before Invoca, according to Brooks, as many patients weren't being scheduled for follow-up appointments.

"Now, with Invoca, our call center team has the tools they need to communicate well with patients," said Brooks.



## Less call drop-off and more appointments scheduled

After implementing Invoca and Signal AI, University Hospitals discovered that 29% of patient phone calls were being routed to a physician messaging service. That service would pass along the patient data to a doctor's office, which would need to call the patient back. Of the 5,800 calls a month going to that service, only 10% were resulting in appointments," said Brooks.



University Hospitals made some changes internally to reduce the drop-off, including training the partner that provides the messaging service to use its scheduling system for appointments. Now, 68% of the callers are getting appointments scheduled. "That's had a huge impact," said Brooks. "Invoca gave us insights into an issue that we didn't even know about."

For example, a patient may make it all the way through the scheduling process and then be turned off by how far out the appointment is. "So, that means we have an operational access issue to resolve — how can we get patients in to see doctors faster?"

## Less manual work and more value-adding initiatives

Now that University Hospitals is using Signal AI to classify calls, its 12-person team that used to handle the process manually can focus more time on other value-adding initiatives. "We've been able to save 40 hours a week in total for all of those employees," said Brooks. "They're now focusing on optimizing their marketing campaigns, developing new creative, and testing new things."

"Invoca has really changed our marketing group, he added. "Instead of being order-takers, we can now develop our strategy and proactively look forward."

"Implementing Invoca at University Hospitals was one of the biggest wins of our department in 2018, and it gave us the data needed to significantly improve performance," said Matthew Eaves, vice president of digital marketing and University Hospitals.

## THE FUTURE

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University Hospitals started using Invoca and Signal AI to gain insights into 13 different marketing programs. Now, the healthcare system is looking to apply the technology everywhere it can. "I'm excited about where we can go with Invoca in the future," said Brooks. "We're already expanding into areas that aren't even marketing-related, like helping different facilities and doctors better understand what's happening with their practice."

"I'd really like to push the boundaries of what the technology can do."

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Learn more about how leading marketers are using call intelligence to drive revenue at [invoca.com/customers](https://invoca.com/customers).

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