

# ARTERA RECEIVES THE 2023 CUSTOMER VALUE LEADERSHIP AWARD

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*Identified as best in class in the North American  
patient engagement industry*

## Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Artera (WELL Health) excels in many of the criteria in the patient engagement space.

| AWARD CRITERIA         |                               |
|------------------------|-------------------------------|
| <i>Business Impact</i> | <i>Customer Impact</i>        |
| Financial Performance  | Price/Performance Value       |
| Customer Acquisition   | Customer Purchase Experience  |
| Operational Efficiency | Customer Ownership Experience |
| Growth Potential       | Customer Service Experience   |
| Human Capital          | Brand Equity                  |

### *Patient Engagement Challenges in Digital Healthcare Transformation Era*

Over the last several years, greater digital technology adoption in the healthcare industry brought about a massive digital transformation. However, delivering a more patient-centric approach, streamlining procedures, and enhancing customer satisfaction remains challenging.

Specifically, the emergence of several players developing solutions for patient communication has made patient engagement a critical concern in the healthcare industry. Self-configuration tools and short message service Gateways vendors power different patient channels. Administrative solution players also automate specific administrative use cases, such as reminders and notifications, based on electronic health record (EHR) triggers. Finally, clinical-first vendors employ licensed clinicians and develop care journeys for specific disease states.

Within this framework, healthcare facilities can integrate various communication software solutions that support patients with multiple features and functionalities. However, providing customers with independent technologies and applications (apps) for each use case requires a unified communication strategy. Therefore, it is essential to consider patient engagement at the platform level, and vendors in the patient engagement space must offer a full suite of tools to meet patients' complex needs. Artera uniquely leverages its expertise and technology to meet its customer's needs, positioning itself to capitalize on new growth opportunities and cementing its leadership in the space.

### **Artera: Powering Connected Patient Experiences**

Founded in 2015 and headquartered in Santa Barbara, California, Artera (formerly WELL Health) is a leading digital health company specializing in patient communications, focusing on improving the healthcare experience for patients and healthcare providers. It offers a platform-level patient communications solution that integrates seamlessly with the health system's technology stack, including EHRs/EMRs, single-point solutions, and apps.

The Artera platform unifies patient communications and information into a single channel, such as texting, email, or interactive voice response, enabling healthcare providers to deliver a more cohesive patient experience while reducing staff workload.

### **At The Heart of Patient Communication: A Platform-level Approach**

With its innovative patient communication platform, Artera offers a cloud solution that integrates with many healthcare applications and Electronic medical records (EMRs), revolutionizing patient communication and increasing patient engagement. Unlike independent bill, pay, digital paperwork, and protocol creation tools, the Artera platform delivers interconnected patient communication via the physician's phone number, allowing seamless interactions and responses.

The company's overall value proposition is simple: a seamless and straightforward patient journey resulting in a world-class customer experience. It achieves this outcome by providing an omnichannel

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**- Manuel Albornoz**  
**Best Practices Research Analyst**

software as a service (SaaS) solution, Artera Harmony, that meets patients on their preferred communications channel and language. The platform has five cornerstones and a robust marketplace of innovators contributing to the patient experience.

#### **Artera Harmony**

Artera Harmony's applications range from equipping healthcare providers with tools to streamline patient communications, minimize message overload, and consolidate various channels throughout the patient journey. Overall, the five components of Harmony are:

**Developer Portal:** It empowers digital health vendors in the Artera Marketplace to seamlessly integrate with

Artera's four application programming interfaces (APIs), leveraging self-service integration capabilities for efficient creation of services, generation of keys, and easy access to API documentation.

**Staff Console:** It streamlines patient communication workflows for the healthcare staff with a user-friendly interface, offering real-time integration across leading EMRs. The staff console allows the team to customize and manage all patient communications from a centralized platform by eliminating the need for external IT support.

**Conversation Builder:** Harmony's advanced Conversation Builder, driven by Natural Language Understanding (NLU), eases the effortless design of sophisticated, multi-step conversations that automate

routine patient communications. With it, users can benefit from a template library for rapid deployment and customization to suit organizational needs.

**Conversation Manager:** This solution enhances Artera’s existing Automations Manager by providing comprehensive control over conversation workflows. Customers leverage the conversation manager to create, prioritize, apply, and manage rules effortlessly for both in-house and third-party designed conversations, ensuring efficient and effective patient interactions.

**Intelligent Analytics:** This cutting-edge platform offers embedded analytics, strategic reporting, and performance benchmarking, empowering providers with valuable insights into their communication performance. Providers can use it to uncover key trends and patterns by comparing anonymized data with similar organizations. The upcoming artificial intelligence (AI)-powered predictive insights will enhance decision-making capabilities, enabling improved outcomes.



With Artera Harmony, users can effortlessly create multi-step workflows while establishing effective rules for prioritization and management. The solution incorporates a user-friendly conversation builder with a comprehensive set of best-practice templates for many workflows to automate communications throughout the patient journey, including referrals, reminders, rescheduling, patient education, and disease-specific processes.<sup>1</sup> This approach eliminates coding complexity and significantly reduces reliance on external information technology (IT) support.

In addition to the conversation builder, Artera’s conversation manager feature will introduce a rules engine for prioritizing workflows built-in-house and external vendors, addressing the risk of over-messaging and meeting compliance requirements. Its staff console is another essential component; specifically, it provides visibility to rerouted communications to live agents whenever AI cannot provide the best service experience, enabling them to engage the patient immediately. Over 30,000 staff members from diverse healthcare providers engage with patients daily through the platform’s staff console.<sup>2</sup> Above all, Artera’s robust data management capabilities underpin the entire system, ensuring customers’ easy access to valuable insights to power better decisions.

### **Artera Marketplace**

The Artera Marketplace enables providers with multiple vendors messaging patients to use Artera’s infrastructure to deliver centralized communications. Vendors from the intake, scheduling, and population health markets, among others, push and pull data through this system. It is the central hub for connecting with innovative partners collaborating with Artera.

Through the Developer Portal, partners can seamlessly integrate their services with Artera’s open APIs, ensuring a cohesive flow of information to patients. This integration reduces noise and places

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<sup>1</sup> Introducing Artera Harmony: Platform to Unify and Orchestrate Patient Communications Across the Healthcare Ecosystem (Artera press release, June 2023)

<sup>2</sup> Ibid

communication within the patient's care journey. Currently, the company has 30 vendors utilizing Artera's open APIs to route communications through the platform.<sup>3</sup>

*"Artera's platform is a highly effective means for reaching individuals with relevant and appropriate education from WebMD. Together, we are closing that gap to ensure providers can present patients with the most relevant information, based on the point in their care journey."*

Ann Bilyew - SVP, Health and Group GM - WebMD Provider Services<sup>4</sup>

Artera's ultimate goal is to be the open communications platform that unifies the health information technology (HIT) ecosystem and brings together all vendors through a proven, integrative, and vendor-neutral business focus that puts the patient experience as the top priority. Natural changes in interaction behaviors occur by tailoring the communication strategy to align with patients' preferences, such as their desired channel and preferred language. This approach increases patient adherence to appointments, facilitates bill payments, and enhances follow-ups with healthcare providers. As a result, Artera's marketplace brings benefits to patients, providers, and vendors alike.

### ***Guaranteed Satisfaction through Personalized End-to-end Customer Service***

With more than 600+ customers, Artera focuses on delivering meaningful communication to patients and significantly emphasizes customer success. The company collaborates with clients in a consultative manner, creating success plans that align with their specific needs and key performance indicators (KPIs). As every health system has unique KPIs, Artera tailors personalized analytics packages for users to efficiently access the necessary data, generate impactful reports, and monitor progress toward their objectives.

A top company objective is rapidly achieving demonstrable, measurable, and tangible outcomes. Hence, Artera's analytics capabilities go beyond pre-built reports, allowing customers to create and customize to meet their business needs. The company plans to provide benchmarking by analyzing variables such as anonymized patient sentiment and responses. In the end, pulling these analysis models together assembles a more comprehensive view of the patient's experience.<sup>5</sup>

In addition, Artera's machine-learning (ML) algorithms constantly analyze patterns to enhance communication experiences. For instance, they can plan when to send billing messages after surgeries, ensuring patients are not overwhelmed with unnecessary information during sensitive times.

*"Artera has completely transformed how we communicate with our patients. It took patient communication from being one of our biggest sources of patient complaints to being an area that is one of our biggest strengths."*

- Jason Wilfong, Chief Executive Officer, Monterey Spine & Joint<sup>6</sup>

Over the past eight years, Artera has accumulated 24 terabytes of text data by sending an estimated two billion text messages to its patient base (covering around 20% of the United States population and 17% of

<sup>3</sup> Frost & Sullivan Interview with Artera (Frost & Sullivan, May 2023)

<sup>4</sup> "Join a robust marketplace of innovators" (Artera webpage: <https://artera.io/marketplace/>)

<sup>5</sup> Frost & Sullivan Interview with Artera (Frost & Sullivan, May 2023)

<sup>6</sup> "Who We Help" (Artera webpage: <https://artera.io/who-we-help/>)

its healthcare facilities).<sup>7</sup> The company has created a high benchmark for its ML models and predictability through this proprietary dataset, leading to continuous improvement.

*“I had no doubt that our patients would embrace Artera. Just walk into any waiting room. Everyone is on their phones, texting. With Artera, we are meeting them where they already are.”*

- Marty Martin, Director of Clinical Informatics, Tandem Health<sup>8</sup>

With a strong focus on customer evaluations, Artera employs multiple methods to track customer satisfaction, including surveys, feedback forms, and regular meetings. The company is steadfast in its commitment to providing high-quality products and services that deliver value and meet customers’ needs, earning its renewal rate of 98%.<sup>9</sup>

### ***Proven Customer Journey: Intuitive for Staff, Meaningful for Patients***

Artera follows a structured implementation process for its platform that involves guiding customers through their journey, from the initial setup to achieving full customization, automatization, and technology integration. The company’s approach is tailored based on customer goals and needs. It can include one-way texting, two-way texting, and conversational messaging via SMS as well as IVR and email communications to create a truly omnichannel solution that meets patients on their preferred communications channel that will continue incorporating more advanced technologies like ML and AI. Appointment reminders commonly serve as a starting point for more profound enhancements to the health system.

Artera’s implementation strategy incorporates standardized interfaces and APIs, allowing for rapid platform deployment and, more importantly, following its primary rule: providing high value to patients while minimizing customer workload. For this reason, the company’s platform showcases a user-friendly staff console as an interface that requires minimal training (less than an hour) for call center and front desk agents to get started.

Moreover, as a SaaS solution, Artera continuously improves and releases customer-self-made conversational bot creator and system administrator tools updates, increasing their intuitiveness. No on-premises deployments, security, or software updates need to be manually installed on the platform as Artera handles the service management, reducing the burden on IT.

During the early days of the COVID-19 pandemic, the company demonstrated its agile ability to meet critical industry needs by introducing a short-term rapid-release program. Since then, it has evolved its strategy to set up a value-based implementation model focused on solving communication and workflow efficiency challenges most critical to healthcare organizations. Above and beyond, repeated customer success stories demonstrate how Artera has assisted healthcare organizations in improving patient communication, staff efficiency, and satisfaction while lowering costs.

Below are a few examples:

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<sup>7</sup> Frost & Sullivan Interview with Artera (Frost & Sullivan, May 2023)

<sup>8</sup> “Who We Help” (Artera webpage: <https://artera.io/who-we-help/>)

<sup>9</sup> “By the Numbers” (Artera webpage: <https://artera.io/>)

**The UNC Health and Gozio partnership**<sup>10</sup> utilized the company’s messaging platform to increase patient engagement and offer a consumer-facing mobile app to conveniently provide the UNC Health Care experience to patients and families via smartphone. Artera created a smart phrase stored in Gozio’s hyperlink to pull in unique appointment information. The hyperlink was added to each reminder, allowing patients to download the UNC Health app on their phones. Within the first week of going live, the link received 4,500 clicks.

**Children’s Wisconsin**<sup>11</sup> had difficulty providing directions to patients during its campus construction work. With the collaboration of Artera and a wayfinding vendor, it created a “Google Maps” of its hospital in Milwaukee to guide patients to the clinic door. Artera partnered with the vendor to match department identification numbers through Epic to expedite the integration process, leading to a reliable and low-maintenance solution.

*In addition to the previous examples, Artera serves various healthcare providers nationwide, including Federally Qualified Health Centers (FQHCs), community practices, academic centers, and Integrated Delivery Networks (IDNs). With over 600 healthcare providers in its network, Artera facilitates a significant volume of communications. Artera handles 2.2 billion communications annually, benefiting more than 68 million patients.”*

**- Manuel Albornoz**  
**Best Practices Research Analyst**

**Cedars-Sinai Kerlan-Jobe Institute**<sup>12</sup> incorporated Artera into its practice operations, transforming patient communications and improving patient and staff satisfaction. By blending naturally and intuitively into existing processes, the platform became an essential tool for patient communication in the institute.

**Tandem Health**<sup>13</sup> reduced its high no-show rate by switching from a clunky patient portal messaging system to Artera’s secure and convenient text messaging platform. With patients already using their phones to communicate, Artera’s platform met them where they were and helped ensure they showed up for their appointments.

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### **Positioned for Growth: Making Communication an Asset**

Artera has completely changed the game for patient communication, achieving an impressive average reduction of 35% in no-shows and saving an estimated 520 annual staff working hours within organizations using the platform. On top of that, the company continually strengthens its phenomenal success through its growth strategy, which identifies new challenges and strives to increase its value

<sup>10</sup> “UNC Health and Gozio” (Artera Webpage: <https://artera.io/resource/unc-health-and-gozio/>)

<sup>11</sup> “Children’s Wisconsin Uses Wayfinding to Provide Concierge Patient Service” (Artera Webpage: <https://artera.io/resource/childrens-wisconsin-uses-wayfinding-to-provide-concierge-patient-service/>)

<sup>12</sup> “Cedars-Sinai Kerlan-Jobe Institute” (Artera Webpage: <https://artera.io/resource/cedars-sinai-kerlan-jobe-institute/>)

<sup>13</sup> “Tandem Health” (Artera Webpage: <https://artera.io/resource/tandem-health/>)

<sup>14</sup> Frost & Sullivan Interview with Artera (Frost & Sullivan, May 2023)

proposition.

For example, not all patients speak English as their primary language and, therefore, cannot understand the information they are receiving, which reduces their engagement and creates inequity. Therefore, listening to its customers, Artera released support in 109 languages to improve communications with these patients and their providers.

The company recently launched Self-Service Analytics, which empowers healthcare providers with elevated reporting capabilities and real-time insights. This feature grants 30 standardized dashboards and data-filtering options to create tailored dashboards and reports that align with customers' business needs. Many healthcare providers like Esperanza Health Center have already deployed Self-Service Analytics to enhance their campaigns' effectiveness and guarantee suitable medical attention.<sup>15</sup>

Artera has brought a new era of patient communication in healthcare, revolutionizing the industry. It recognizes that integrating multiple partners into the network is crucial for true transformation; therefore, the company has assembled an extensive partner ecosystem to deliver the most comprehensive patient communication solutions available. Some notable companies Artera works with include Epic, CISCO Finesse, Twilio, Cerner, and Meditech.<sup>16</sup>

Frost & Sullivan believes the company is well-positioned to drive the space into its next growth phase, capturing market share and sustaining its leadership in the coming years.

## Conclusion

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Customer-centric strategies help companies safeguard leading positions in markets, but only if the approach is authentic and the implementation seamless. Artera incorporates client-focused strategies and exemplifies best practices implementation. The company's innovative patient communication platform provides a flexible, open cloud solution, revolutionizing patient engagement by seamlessly connecting all healthcare applications through a single phone number, the health system's phone number. Unlike independent bill, pay, digital paperwork, and protocol creation tools, Artera offers a comprehensive and interconnected solution, resulting in a customer renewal rate of 98%.

To deliver solutions in alignment with the client's specific needs and key performance indicators, Artera employs a collaborative, consultative approach, offering personalized analytics packages to help users access data efficiently and generate impactful reports to monitor improvement. Customer observations are essential for the company, using multiple methods to track customer satisfaction, including surveys, feedback forms, and regular meetings. Finally, Artera's implementation strategy is to provide high value to patients while minimizing customer workload, incorporating standardized interfaces and APIs to allow for rapid platform deployment.

This overall customer-first approach offers immense value to existing and new customers and solidifies Artera's reputation in the market. For its strong overall performance, Artera earns Frost & Sullivan's 2023 North American Customer Value Leadership Award in the patient engagement market.

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<sup>15</sup> "Artera Launches Self Service Analytics, Enabling Customized Reporting and Real-Time Patient Communications Insights" (Artera press release, April 2023)

<sup>16</sup> Frost & Sullivan Interview with Artera (Frost & Sullivan, May 2023)



## What You Need to Know about the Customer Value Leadership Recognition

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Frost & Sullivan's Customer Value Leadership Award recognizes the company that offers products or services customers find superior for the overall price, performance, and quality.

### Best Practices Award Analysis

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### *Business Impact*

**Financial Performance:** Strong overall financial performance is achieved in terms of revenues, revenue growth, operating margin, and other key financial metrics

**Customer Acquisition:** Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

**Operational Efficiency:** Company staff performs assigned tasks productively, quickly, and to a high-quality standard

**Growth Potential:** Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

**Human Capital:** Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

#### *Customer Impact*

**Price/Performance Value:** Products or services provide the best value for the price compared to similar market offerings

**Customer Purchase Experience:** Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

**Customer Ownership Experience:** Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

**Customer Service Experience:** Customer service is accessible, fast, stress-free, and high quality

**Brand Equity:** Customers perceive the brand positively and exhibit high brand loyalty

## About Frost & Sullivan

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## The Growth Pipeline Engine™

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### Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



## The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

### Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

