

Company & Project Overview

Founded in 2010 by physicians and technologists, the Boston, MA based Kyruus Inc. delivers proven provider search and scheduling solutions to help hospitals and health systems match patients with the providers.

**2017** **~400**

**KyruusOne™**  
Provider Data Management Platform That Powers the **ProviderMatch** Applications

- Rigorous data processing & maintenance
- Intuitive provider profile management
- Physician-curated clinical library

**ProviderMatch for Access Centers**

**ProviderMatch for Consumers**

**ProviderMatch for Network Referrals**

**2010** • Kyruus is founded in MA by Julie Yoo and Graham Gardner

**2015** • Series C investment **\$25M**  
• Total capital raised **\$60M**

**2017** • **105,000** physicians nationwide  
• Customer base consists of large health systems that have multiple acute care facilities and a provider network of 2,000+.

**2020** **Health Systems Patient Access Center**

**Select ProviderMatch Clients**

Keck Medicine of USC, MedStar Health, MERCYHEALTH, Mount Sinai, NORTON, PARTNERS, UCSF Benioff Children's Hospital San Francisco, Yale Medicine

Kyruus platform

**DIGITAL INVENTORY**  
KyruusOne creates a **universal inventory of providers and appointment inventory** by automating the aggregation, integration, and reconciliation of data from multiple source systems.

**DATA ENHANCEMENT & RULES ENGINE**  
The system then **enhances the provider profiles with content from the Kyruus Clinical Library**, which classifies each provider by the diagnoses and procedures that comprise their clinical expertise. This information is further governed by **business rules** to ensure patients are routed to the right care options.

**MATCH & BOOK**  
Schedulers, patients, and referring provider offices then use ProviderMatch to **route patients to the right providers, and book appointments online.**

**OPTIMIZE**  
Assess your **provider network composition and demand-side query logs** to understand what services patients are requesting, and whether gaps exist in your network.

**KyruusOne**  
Business Rules  
Provider Profiles, Clinical Library, Appt Inventory  
API  
Analytics

Market Research and Methodology

Our research focused on identifying on (a) performing a market landscape analysis and (b) assessing the demand for outsourced call centers, together with demand drivers and barriers to adoption, to inform Kyruus strategy and recommend the service offerings they should develop.

Methodology			
Data Gathering	Data & Analysis	Academic Research	US Call Center Market
<ul style="list-style-type: none"><li>Onsite Interviews &amp; Telecons</li><li>ProviderMatch Product Demos</li><li>System Architecture &amp; Process Overview</li><li>Market perspectives</li><li>Operational challenges</li><li>Kyruus Team: Julie Yoo (CPO), Dave M (D-CS), Emma Smith (VP M), Erin (CMO)</li></ul>	<ul style="list-style-type: none"><li>Effectiveness of a Call Center agent</li><li>Based on Patients' – Clinical Match, Insurance Match, Proximity, Gender &amp; Availability</li><li>Average call wait times</li><li>42% unable to match a patient to a provider</li><li>40% agents unable to meet patient interests</li><li>82% unable to book an appointment</li></ul>	<ul style="list-style-type: none"><li>Traditionally Managing Call Centers</li><li>Forecasting, Resource Acquisition, Staffing &amp; Routing, Uncertainty</li><li>Co-Located Centralized model</li><li>Demand Modulation</li><li>Technology Innovation &amp; Challenges</li><li>Outsourcing &amp; Service Contracting</li><li>Integrating &amp; Value Capture</li></ul>	<ul style="list-style-type: none"><li>Global call center market (medical and non-medical) is USD 300-350 billion in 2015</li><li>Approx. 25% i.e., USD 70-75 billion, corresponds to outsourced call centers</li><li>In healthcare sector, approx. 2/3 of all U.S. hospitals (~3800 hospitals) employ call centers</li></ul>

	Distributed	Centralized - Co-located	Centralized - Integrated
Benefits	<ul style="list-style-type: none"><li>Easy to implement</li><li>Investment in a separate space is not required</li><li>Support for specialties with complex requirements</li></ul>	<ul style="list-style-type: none"><li>Better patient routing (dependent upon setup)</li><li>Cross-trained agents &amp; flexible staffing</li><li>Improved patient demand conversion</li></ul>	<ul style="list-style-type: none"><li>Optimized network utilization</li><li>Cross-trained agents &amp; flexible staffing</li><li>Improved patient demand conversion</li></ul>
Challenges	<ul style="list-style-type: none"><li>Lack of visibility into full provider network</li><li>Uneven demand distribution across network</li><li>Limited ability to measure performance across system</li><li>Risk of patient calls going unanswered</li></ul>	<ul style="list-style-type: none"><li>Lack of visibility into full provider network</li><li>Some change management required</li><li>Scheduler productivity is not maximized</li></ul>	<ul style="list-style-type: none"><li>Significant change management required</li><li>Strain on access center agents without appropriate infrastructure and technology</li></ul>

Patient Access Center – Existing Competition

AnswerForce, DIALAMERICA, MCKESSON, athenahealth, RelateCare, Signius Communications

We identified key competitors of Kyruus in the outsourced call center market. Based on their analysis, we recommend the following strategic differentiators.

Strategic Differentiators & Recommendations

**Health centers' preferences**

**In-house**

- Personal touch
- Security
- Flexibility

**Outsourced**

- Cost-effectiveness
- Focus on productivity
- Reduced risk
- Trained staff
- Scalability

**Pros**

- Cost
- Maintenance
- Compromised productivity
- Lower technology

**Cons**

- Customization constraints
- Security issues
- Reduced focus
- Less control

**Advisory services** **Managed services**

Through interviews with medical professionals in the Boston area and a online survey, we identified they key reasons and deterrents to adopt an outsourced patient access center model. We found that ultimately, the decision to outsource or maintain an in-house call center model depends on what pros/cons are valued most. Kyruus can cater both preferences through managed services and advisory services.

Based on our analysis of the call center market and Kyruus' existing platform, we recommend a series of service offerings for both the managed services (outsourced call centers) and the advisory services. By analyzing Kyruus' core capabilities and the existing competitors, we make a recommendation on the key strategic differentiators Kyruus should adopt.

**Expansion recommendation into Patient Access Centers**

Product	Description	Strategic differentiators
<b>Managed Services (Fully Outsourced Call Centers)</b>	<ul style="list-style-type: none"><li>Services to Core Common Healthcare Issues e.g. appointment scheduling</li><li>Standardized Care Deliver through Integrated Teams with intelligent agent matching</li><li>Geographic Coverage and Rostering</li><li>Care Delivery and Performance management</li><li>Integrated Financial Transactions Management</li><li>Customer Preference Evolution</li></ul>	<ul style="list-style-type: none"><li>Existing database of provider profiles and clinical libraries for service personalization.</li><li>Existing appointment inventory platform</li><li>Predictive analytics to modulate agents' workflows.</li><li>Multi-access platform (call &amp; web/app-based)</li></ul>
<b>Advisory Services (consulting &amp; data analytics)</b>	<ul style="list-style-type: none"><li>Services &amp; Strategic Patient Focus</li><li>Integrated Information Systems</li><li>Organizational Culture, Leadership and Training</li><li>Operations &amp; Governance Structure</li><li>Guided workflows</li></ul>	<ul style="list-style-type: none"><li>Agent analytics</li><li>Workflow analytics</li><li>Predictive analytics to forecast demand</li></ul>

**Outsourced call center model**

**Inbound calls** **Intelligent agent matching** **Outbound calls** **Intelligent agent matching**

**Inbound call** **KYRUUS** **Outbound call**

Appointment scheduling, Medical consultation, Chronic disease management, Telepharmacy, Billing

Patient profile, Agent profile, Provider profile, Plan details

Appointment reminders, Care after discharge, Chronic disease management, Telepharmacy, Billing

**H Lab Team**

**Prasad Savarapu** **Daniel Lopez-Martinez**

We recommend an outsourced call center model that leverages Kyruus' existing big data capabilities to adequately perform agent matching and modulate demand flows, while providing different services beyond appointment scheduling.