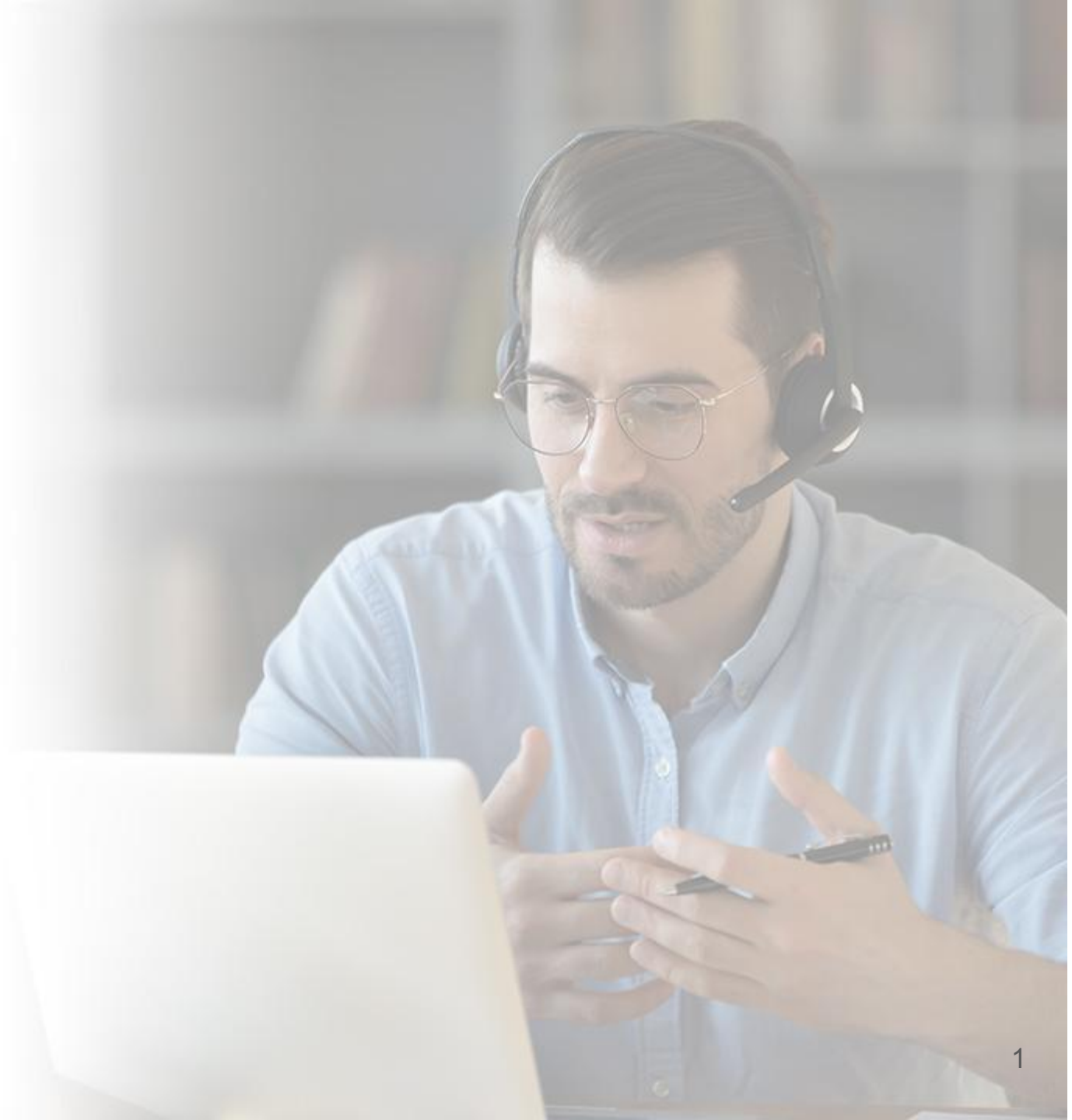


# Ambulatory Buyer Personas

*Azalea Health  
Summer, 2023*



# Buyer Personas vs User Personas



## Buyer Persona

Goal is to understand how the individual behaves and makes decision as a consumer and incorporates all of those involved in the buying decision



## User Persona

Comprised of market research and experience to describe the relevant needs and goals of individuals who use your product. A buyer isn't necessarily a user.

# Buyer Persona Roles

Role	Description
Decider	Someone who makes the final decision to purchase a product
Buyer	Buyer or budget holder that can provide a certain level of approval
Approver	Approving authority, such as legal or CFO
Champion	Champion of your product and actively promotes your product within the organization
Executive	Large influencers who hold a high position within the organization
Influencer	Someone in the organization who can persuade the buying committee
User	Final or end user who uses your product
Gatekeeper	Anyone who delays or affects the sales process from progressing
Challenger (Sniper)	Individual who does not see the value of the product or solution, often a distraction in the sales process

# Persona Involvement

Buying Process	Personas Involved
Lead Qualification	Practice Manager, Biller
Discovery	Practice Manager, Biller
Presentation	Owner / CEO, Practice Manager, Provider, Biller, Admin Asst*, CFO*
Evaluation/Proposal	Owner / CEO, Practice Manager, Provider, Admin Asst*, CFO*
Negotiation	Owner / CEO, Practice Manager, CFO*
Contracting	Owner / CEO, CFO*
Renewal	Owner / CEO, Practice Manager, CFO*
Cross sell / Upsell	Owner / CEO, Practice Manager, Provider, Admin Asst*, CFO*

\* Typically only in larger practices

# Practice Administrator



## Buyer Roles

Buyer  
Champion  
Influencer  
User

## Background, Demographics, & Titles

- Titles: Practice Manager, Practice Administrator, Office Manager, Office Administrator
- Previous role experience as a biller or nurse practitioner
- Potential to have family ties to CEO/Owner
- Mid-Late career (~40s-60s)
- Skews female
- Tech savvy, consumes content through list serves, email, online research, conferences, webinars, local associations
- Prefers to consume content in digestible, snackable, content forms.
- Conducts extensive research on products and solutions through whitepapers, eBooks, or quick videos

## Daily Responsibilities

What types of activities is this person doing daily?

- Run the day-to-day operations of the practice from the front desk, reporting, analytics, etc.
- Well-rounded team player that focuses on staff satisfaction, “glue” to the practice
- Typically the “super user” of the existing EHR
- Consult with patients, deal with escalations, and delivering on the patient experience
- Manage the triage process
- May be handling the billing if previous experience is billing
- Conducts staff training
- Compliance officer

## Buying Power

What role do they play in the sales process?  
Where do we see them in the buying process?

- Evaluates the features and functionality
- Kick off the buying process, develop the vendor shortlist - typically 3
- Present throughout the entire buying process
- High degree of influence in the buying process
- Ability to veto the CEO on final decision (if CEO is not a user)

## Goals

What is this person looking to achieve?

- Employee satisfaction and employee retention
- Patient experience, communications and transparency
- Patient satisfaction score
- Billing efficiency (collection rates, claim speed, etc.)
- Keeping CEO informed on state of operations
- Decreasing re-admittance rate and quality reporting
- Increase profitability and number of patients seen across the practice

## Challenges

What is preventing them from achieving their goals?

- Staff turnover/staff retention
- Speed of existing technology to achieve desired outcomes (e.g., data/analytics)
- Billing transparency
- Provider efficiency
- Staff resistance to change
- Paperwork completion prior to visit
- Patient engagement (retaining, communication, etc..)

## Marketing Message

How can you describe your solution to have the biggest impact on your persona?

### Improves Patient Experience

- Portal streamlines patient flow and engagement (documentation, scheduling, online bill pay, check-in/registration)
- Increase access to care with Telehealth options
- Increase health maintenance visits through timely patient wellness communications
- Proactively identify and manage gaps in patient care with Analytics

### Streamlines Provider Workflows

- Access to comprehensive charting to more effectively deliver care plans to patients and prevent readmittance
- Integrated turnkey MIPS registry saves time
- 30% reduction in time charting; spend more time with patients delivering quality care\*
- 70% of charting from one screen\*
- Speed patient documentation by 99 seconds\*

### Increases Clinic Efficiency

- Speed intake: 25% reduction in pt registration time\*
- Reduce time managing billing by 50%\*
- Insights into HCC scores for higher reimbursements
- Reduce audit risk by ensuring providers are appropriately documenting care
- Speed sending referrals by 34 seconds\*

### Improves Employee Experience

- Faster onboarding; “have an employee charting in an hour and a half”
- Single system to manage your scheduling, clinical, and billing
- Optimize staff workflows with personalized templates
- Role-based, on-demand training programs
- Multiple channels deliver fast support

# Biller



## Buyer Roles

Champion  
User  
Influencer  
Sniper  
Approver

## Background, Demographics, & Titles

- Titles: Biller, Accounts Receivables, Coder, Manager
- Demographics: Skews female, Middle aged
- Background: Coding certification, Grew with the office/practice, high school graduates, family ties
- Content channels: Facebook, Reddit, Hometown Health, HBMA, HFMA, MGMA
- Content preferences: Videos, webinars, email, short form
- Content topics: Data sheets, CMS, annual billing and compliance changes

## Daily Responsibilities

What types of activities is this person doing daily?

- Claim management: scrubbing claims, claim creation/submission, claim follow up
- Checking eligibility coverage
- Authorizations to approve for select services (e.g., procedures, medications)
- Provider consultation on CPT codes for claims
- Contract management between providers and payers
- Provider credentialing
- Capitation depending on state services are rendered
- General A/R reporting, accurate reimbursement reporting
- Accurate patient collections

## Buying Power

What role do they play in the sales process?  
Where do we see them in the buying process?

- Ability to veto the deal
- Act as an approver in some situations
- If coming/going to an RCM service, their job is threatened depending on the situation and specialty
- Biller is often seen early in the sales process and stays engaged through the entire sales process

## Goals

What is this person looking to achieve?

- High first pass claim rate
- Maximize reimbursement amounts
- Speed to payment, limit days in A/R
- 62% of the time patient collections are not collected at time of service
- Effective denial management, timely filing, insurance management
- Increase patient collections at time of patient service
- Ease of use for patient payments (payment options)
- Automated charge creation

## Challenges

What is preventing them from achieving their goals?

- Changing payer reimbursement rules, claim rules, etc..
- Providers not following proper workflows
- Missing patient documentation
- Manual posting and human error
- Non-integrated solution between practice management and clinical
- Difficulty reporting on collections, outstanding A/R, etc.

## Marketing Message

How can you describe your solution to have the biggest impact on your persona?

### Optimize Reimbursements

- Powerful claims scrubbing engine reduces denials and payment delays
- Integrated patient responsibility estimator
- Denial management tools help identify and address denied claims
- Reduce days in A/R by 10%\*
- Reduce number of denials by 10%\*

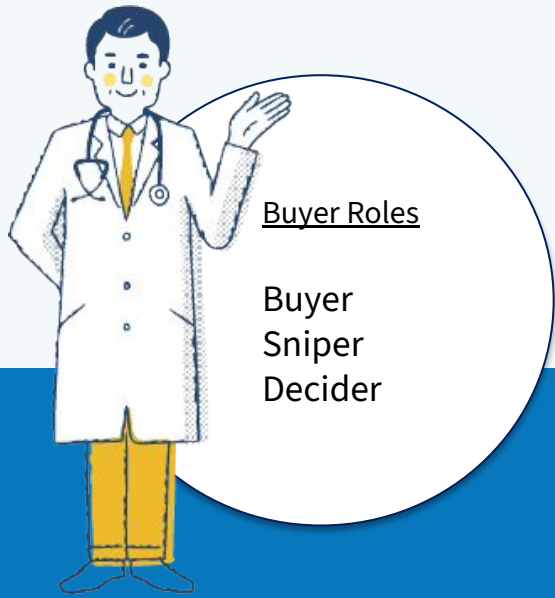
### Streamline RCM Operations

- Automated billing and coding tools let you quickly generate claims
- Workflows reduce manual processes and human error
- Work queues help teams prioritize work
- Patient self-service tools reduces time it takes to manage billing and payment inquiries
- Post payments one minute faster than industry average\*

### Improved Billing Operations Visibility

- Real-time claims status lets you identify and address issues
- Compare your practice to industry averages and uncover opportunities to improve your operations
- Proactively review performance against industry benchmarks

# Provider



## Buyer Roles

Buyer  
Sniper  
Decider

## Background, Demographics, & Titles

- Titles: Provider, MD, PA, Doctor, Managing Physician, PA, Nurse Practitioner
- Educated, typically in their 40's or 50s, and are higher income
- Prefers short-form content, and leverages peer reviews/referrals
- Prefers emails, events, and associations (MGMA, HIMMS, etc)
- Content topics are centered around educational content, data/research, and credible sources

## Daily Responsibilities

What types of activities is this person doing daily?

- Provides patient care, documents care, and manages patient outcomes
- Charts patient health
- Prescribes solutions to improve patient health and patient outcomes

## Buying Power

What role do they play in the sales process?  
Where do we see them in the buying process?

- Provider is able to veto or push the deal forward
- Provider is an active influencer in the deal and can be seen throughout the buying process, primarily in the discovery and platform configuration stages

## Goals

What is this person looking to achieve?

- Increase patient volume
- Improve quality of care
- Optimizes provider workflows
- Actively works to simplify medical documentation
- Mindful of increasing transparency internally and externally

## Challenges

What is preventing them from achieving their goals?

- Provider wears multiple hats at the organization which limits their focus
- Burdened by administrative tasks within the business
- Difficulty managing staff retention, burnout, and patient retention
- Implications that arise from changing regulations and reporting needs

## Marketing Message

How can you describe your solution to have the biggest impact on your persona?

### **More Time to Deliver Quality Care**

- View and change schedules in real-time
- Customized templates for collaborative charting
- Proactive patient lifecycle management through clinical intervention/clinical care plans
- View multiple patients at once - Interoperability
- All-in-one solution to manage patient care
- Reduce time spent charting by 30%\*

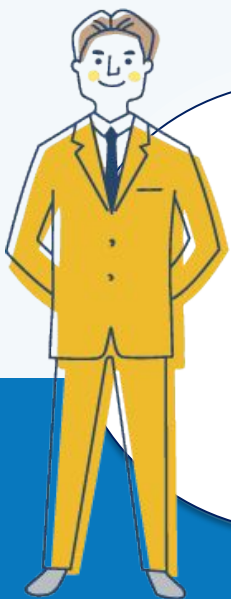
### **Streamline Patient Administration**

- Accuracy and ease of clinical data collection
- Improved reimbursements with code capture
- Drag-and-drop care level transitions
- Reduced clicks and time required post patient visit
- Conduct 70% of charting from one screen\*
- Speed patient documentation by 99 seconds\*

### **Ensure Compliance**

- Built in compliance and audit reporting
- RHC certification reporting
- ONC Certified
- SOC 2 Type 1 Certified
- Reduce audit risk by ensuring providers are appropriately documenting care

# Owner/CEO



## Buyer Roles

Executive  
Decider  
User

## Background, Demographics, & Titles

- Often nurse practitioner and/or physician
- Located in rural areas
- Gained experienced in larger health systems
- On average in their early 40s and stay until the end of their career
- Rural: Prefer to consume content in direct methods, face to face, and associations (NARHC)
- Urban: consume content at conferences, digitally, and associations (MGMA)
- Content types: short form, digestible content that provides value to improving their daily responsibilities

## Daily Responsibilities

What types of activities is this person doing daily?

- Manage executive staff, office manager, billing manager
- Act similarly to a COO to ensure operations are smooth
- Depending on the size of the practice, continue to see patients if they are providers
- Manage profitability, quantifying expenses
- Typically focused on growing the practice
- Focused on reporting and achieving efficiency across processes (state measures, RHC required reporting, cost containment/expenditure)
- Improve physician alignment and engagement

## Buying Power

What role do they play in the sales process?  
Where do we see them in the buying process?

- If they are a user, they will lead the entire buying process
- If they are not a user, they will rely on their executive and management staff to make the decision
- Owner/CEO is often the individual who starts the search and contributes to the entire buying process at smaller practices
- Providers and billers can prevent the buying process from continuing and influence the CEO

## Goals

What is this person looking to achieve?

- Forward-looking, visionary, setting the direction for the practice
- Achieving growth and scalability
- Increased patient care, safety, outcomes and retention
- Increased efficiency, reduced overhead, consolidating systems/tools
- Quality of staff, scalability of staff
- Succeed with risk-based payment models
- Facilitate acquisitions, consolidations, and partnerships/affiliations

## Challenges

What is preventing them from achieving their goals?

- Reporting on financial, provider efficiency, and quality. Inclusive of reporting to the board
- Change management, adopting change across their staff
- Revenue leakage, operating budgets, reimbursements
- Poor/inadequate technology infrastructure
- Staff shortages/access to talent
- Compliance and regulation changes

## Marketing Message

How can you describe your solution to have the biggest impact on your persona?

### Increases Profitability

- Increase revenue 7% through RCM services\*
- Scale provider efficiency and patient volume (30% reduction in charting time)\*
- 50% reduction in time and cost of managing EHR infrastructure\*
- 10% reduction in A/R days\*

### Improves Patient Experience

- Telehealth options increase access to care
- Portal streamlines patient flow and engagement (documentation, scheduling, online bill pay, check-in/registration)
- API marketplace offers additional patient services like intake management and merchant services\*

### Delivers Performance Management Data

- Turnkey performance improvement reporting across RCM, financials, and patient care
- Accessibility to all clinic data - across multiple locations and databases
- Easy compliance reporting
- Transparency of service (RCM)
- Visibility into collections and financial performance



# Administrative Assistant



## Buyer Roles

User  
Champion  
Influencer

## Background, Demographics, & Titles

- Titles: Administrative Assistant, Receptionist, Office Coordinator
- Female in their 30s-50s (avg)
- Consumes content on Facebook and associations such as MGMA
- Content preferences are typically short form content and videos
- Leverages referrals and reviews from peers

## Daily Responsibilities

What types of activities is this person doing daily?

- Oversees/supports the day-to-day operations of the office
- Supports the training and managing of staff
- Defines the policies and processes within the facility
- Supports scheduling, patient intake, and follow up on billing

## Buying Power

What role do they play in the sales process?  
Where do we see them in the buying process?

- Admin actively influences the deal and can push the deal forward
- The admin is regularly seen early in the buying process: Discovery, Demo, and configuration of the platform.
- Admin's responsibilities tend to taper off in the buying process after the platform is configured to the organizations needs

## Goals

What is this person looking to achieve?

- Increase the efficiency of the facility/practice
- Focused on growing the practice
- Aspirations to grow their career
- Acts as the voice of the practice to ensure it is running smoothly

## Challenges

What is preventing them from achieving their goals?

- Managing time amidst constant offboarding and onboarding of staff
- Little corporate power to enact transformational change
- Managing multiple priorities, schedules, and software systems to accomplish their daily responsibilities
- Suffers from a lack of role clarity within the business

## Marketing Message

How can you describe your solution to have the biggest impact on your persona?

### **Proactively Manage Patient Volume**

- Analytics and reporting on scheduling and provider utilization
- Patient rescheduling/ communications
- Automated patient care communications

### **Improve Patient Experience**

- Decrease waitroom times
- Increase patient throughput
- Online scheduling
- Digital new patient documentation
- Streamlined patient collections

### **Delivers High Levels of Support & Service**

- Dedicated/boutique
- Multiple support channels; phone, chat, email
- Role-based, on-demand training library

# CFO



## Buyer Roles

Buyer  
Champion  
Influencer  
User

## Background, Demographics, & Titles

- Titles: CFO, Controller, VP of Finance
- Well educated, often with an MBA
- Late career that tends to skew male
- CFO prefers to engage at events and short form content on occasion

## Daily Responsibilities

What types of activities is this person doing daily?

- Focused on optimizing cost structures within the business
- Ensures the practice is financially sound
- Facilitates audits and ensures practice is compliant
- Strategic advisor to CEO who recommends strategies to increase profitability

## Buying Power

What role do they play in the sales process?  
Where do we see them in the buying process?

- The CFO can veto the deal; must ensure there is executive sponsorship from the CFO as the deal progresses
- CFO acts as an influencer in the deal based on the objectives of the business
- The CFO is routinely engaged later in the buying process (Terms/Contract/Renewal)

## Goals

What is this person looking to achieve?

- Increase cash flow
- Executing cost-reduction initiatives
- Maintain profitability
- Improve reimbursement rates
- Identify areas to grow the business

## Challenges

What is preventing them from achieving their goals?

- Manual and/or inaccurate reporting
- Limited cashflow, managing payroll
- Declining reimbursements
- Regulatory issues or changes
- Payer collections/Denial Analysis

## Marketing Message

How can you describe your solution to have the biggest impact on your persona?

### Better Visibility and Accuracy of Financials

- Performance management against KPIs and CQMs
- Tools to monitor contractual reimbursements
- Prebuilt dashboards and benchmarking tools
- Reporting across multiple locations and facilities
- Ad Hoc reporting

### Maximize Cash Flow /Profitability

- Reduced IT staff and maintenance costs by 50%
- Powerful claims scrubbing engine reduces denials and payment delays
- Easily scale up or down, depending on needs
- Denial management tools identify and address denied claims
- Reduce days in A/R by 10%
- Reduce number of denials by 10%

### Ensure Compliance

- Easy compliance reporting
- RHC certification reporting
- ONC Certified
- SOC 2 Type 1 Certified