Digital Engagement of Patients
Improving Patient Experience and Population Health Management

March 2015
Why Now?

Patients have, and exercise, more choice about their healthcare.

Customer expectations are increasingly high, and increasingly complex.

Cost shifting to patients causes them to behave in more economically rational ways.

Healthcare is a relationship business, and relationships are changing.
The New Healthcare Consumer

On-demand healthcare delivery

User reviews and personalized recommendations

Simple financial management tools

Data to inform decision making

Engagement through devices

A mobile app to order Rx refill while out of town
Market forces, new entrants and businesses in other industries are driving high expectations for **increased convenience, transparency and access**

Domino's Pizza Tracker takes the mystery and anxiety out of waiting for a pizza by sending customers **real-time order updates** so customers can see exactly where their pizza is.

Zappos customer service representatives are **accessible 24/7** to answer questions from customers and also provides a 1-800 number on every package that is sent.

OpenTable displays **all available reservation openings** based on a search. Customers can compare the openings of multiple restaurants at the same time.

**Increasingly, customers expect to receive real-time updates, have 24/7 access to services, and be provided self-service tools they can use at their own convenience**
Potential competitive threats to traditional provider organizations are emerging in the delivery of primary care and lower complexity procedures in the near term.

Walgreen’s and WebMD partner to provide health coaching. Walgreen’s customers earn rewards by logging healthy behaviors.

Mango, a mobile medication management platform, provides incentives to patients with chronic disease.

Mayo Clinic offers eConsult – an electronic consultation between two providers to give patients the care they need, while sparing them unnecessary doctor’s appointments. Providers collaborate on a recommendation that is then shared with the patient.

New entrants in the provider space are giving patients additional opportunities and incentives to manage their own health outside the traditional care model.
A new era of transparency in health care is forcing providers to think hard about the level of insight and predictability they provide into costs and quality.

ZocDoc has a comprehensive doctor profile, including specialties, photos, and consumer reviews.

The Healthcare Bluebook provides online tools to enable patients to understand how much they should pay for services.

Patient Fusion promotes stronger physician-patient connections by providing transparent access to health information and graphical tools allowing users to track their costs.

Patients are increasingly utilizing tools and services that educate them and provide transparency throughout their healthcare experience.
Competitive pressures within markets are driving momentum for providers to evolve their level of service and strive to provide excellent experiences in addition to clinical outcomes.

Kaiser Permanente Northern California’s (KPNC) flagship mobile and tablet applications provide self-service, prevention, and health analytics.

As investment in EMR abates, there is an opportunity for healthcare organizations to improve upon common pain points and address the patient experience.

At Southwest General Hospital patients can check in online, get a projected treatment time and wait in the comfort of their own home.

Franciscan Health System launched a virtual urgent care service extending quality care to the patients’ home any time of day or night via video chat on smartphone, tablet or PC.
Population health management is generating activity in the home health and chronic condition management space (e.g., Apple, Philips) in an attempt to reduce costs. **Major investments in foundational capabilities are required** to enable these capabilities in the future and absorb their operational impact.

The Mayo Clinic Pre-Bariatric Surgery App is designed to **help patients prepare for bariatric surgery**. This application’s popular suite of features includes: **learning modules**, FAQs, **Goal Center**, Award Center, Track It! And Care Team Connect.

Partner HealthCare launched the Center for Connect Health (CCH). Applying personal health technologies, including **remote monitoring**, mobile health, **personal health trackers and sensors**, CCH has reduced hospital readmission by 48% while improving patient understanding.

**Empowering patients to manage their own conditions through apps and other online tools can improve clinical outcomes reduce hospital readmissions**
Delivering an enhanced patient experience creates value in both **direct and indirect ways** positioning leaders to win in a more competitive environment.

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<thead>
<tr>
<th>Direct Impacts</th>
<th>Indirect Impacts</th>
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<tr>
<td><strong>Drive new referrals</strong></td>
<td><strong>Foster better clinical outcomes</strong></td>
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<tr>
<td>Across industries, companies with higher NPS see</td>
<td>Nearly half of patients cannot correctly identify</td>
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<td>more new volume generated by referrals from</td>
<td>their diagnosis and treatment recommendations after</td>
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<td>existing customers. Healthcare is local and word</td>
<td>discharge(^1). A more seamless, personalized</td>
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<td>of mouth has a big impact</td>
<td>consumer experience drives better adherence and</td>
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<td>follow-up.</td>
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<td><strong>Increase Customer Lifetime Value</strong></td>
<td><strong>Reduce Readmissions</strong></td>
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<td>Highly satisfied patients may be more likely to</td>
<td>There is a strong correlation between high HCAHPS</td>
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<tr>
<td>seek ancillary services and future medical care</td>
<td>scores and low readmission rate(^2). High</td>
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<td>associated with the system based on brand promise.</td>
<td>penalties could be reduced if readmissions fell.</td>
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<td><strong>Maximize Value Based Payments</strong></td>
<td><strong>Move care to the right setting</strong></td>
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<td>By 2017, 4% of total Medicare revenue will be at</td>
<td>More engaged, more satisfied patients may be more</td>
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<td>risk for cost and quality outcomes. 30% of</td>
<td>likely to respond to messaging and move primary and</td>
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<td>payment is tied to HCAHPS customer satisfaction</td>
<td>urgent care out of the ER.</td>
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<td>ratings.</td>
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Investments in capabilities must be guided by a clear understanding of **brand and positioning** and be consistently well-executed across all channels.

- **A clear strategy and brand positioning**
  - Develop a clear and compelling **vision for consumer engagement** and focus on **building the brand** as an extension of the strategy.

- **Deep consumer insights**
  - Develop a meaningful **segmentation** of consumers and **map their journeys** to understand pain points, moments of delight and unmet needs.

- **Great execution on enabling capabilities**
  - Plan, train and deploy the right capabilities to enable a seamless, omni-channel experience and focus on “signature moves” that define and differentiate.

Implementing leading practice customer experience transformation efforts strengthens competitive positioning while helping to reduce costs.
But, implementation goes well beyond just creating an App or webpage. A deep appreciation of the target customer segments and insight into their behaviors must inform the conceptual designs and implementation.
Digital Health Strategy and Roadmap Approach

Competitive & User Research

Future State Patient Journeys

Digital Health Initiatives

Digital Health Roadmap

Digital & Creative Designs

Advanced Proxy Management

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