Digital Engagement of Patients
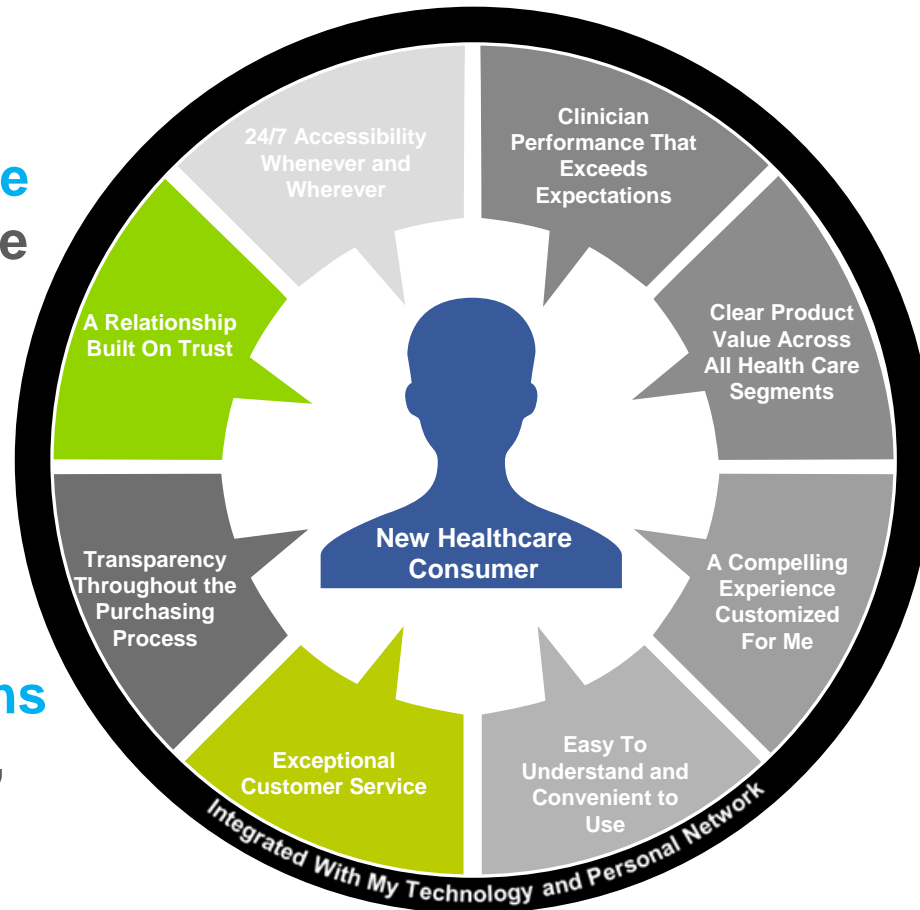
Improving Patient Experience and Population Health Management

March 2015

Deloitte.

Why Now?

Patients have, and exercise, more choice about their healthcare

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

Customer expectations are increasingly high, and increasingly complex

Healthcare is a relationship business, and relationships are changing

New Healthcare Consumer

- 24/7 Accessibility Whenever and Wherever
- Clinician Performance That Exceeds Expectations
- Clear Product Value Across All Health Care Segments
- A Compelling Experience Customized For Me
- Easy To Understand and Convenient to Use
- Integrated With My Technology and Personal Network
- Exceptional Customer Service
- Transparency Throughout the Purchasing Process
- A Relationship Built On Trust

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The New Healthcare Consumer

On-demand healthcare delivery

UBER

Simple financial management tools

mint

Engagement through devices

fitbit

weightwatchers
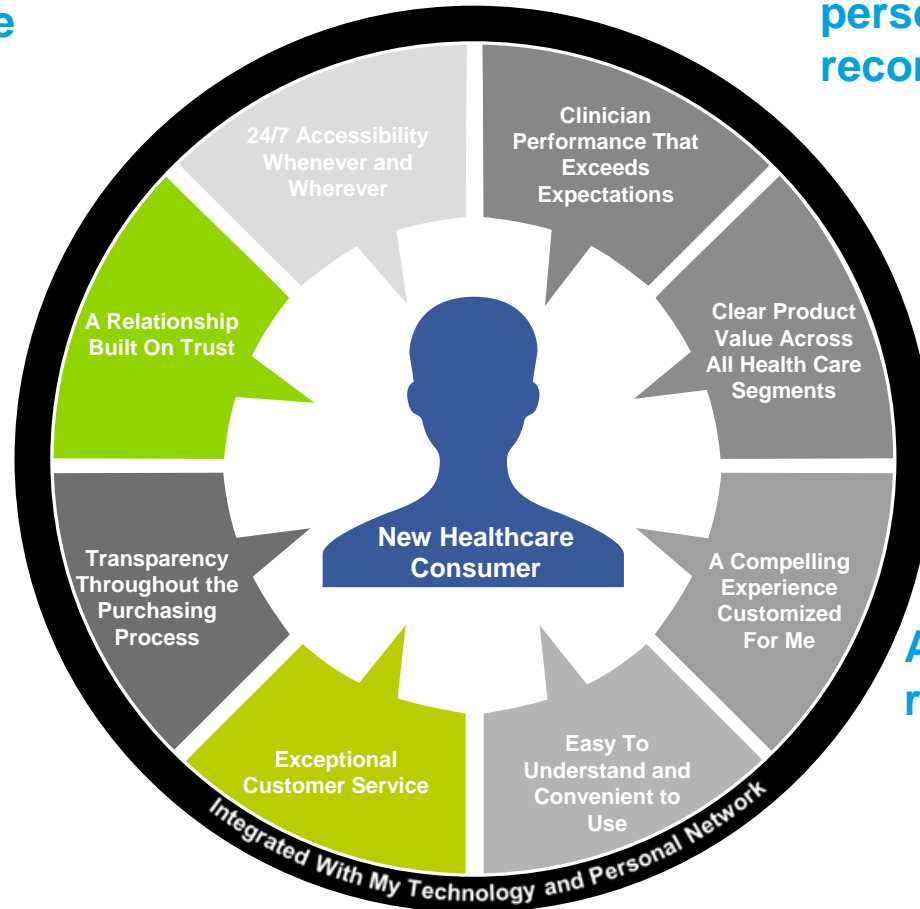
User reviews and personalized recommendations

yelp

Data to inform decision making

amazon

A mobile app to order Rx refill while out of town

Wheel diagram — center: New Healthcare Consumer. Segments: 24/7 Accessibility Whenever and Wherever; Clinician Performance That Exceeds Expectations; Clear Product Value Across All Health Care Segments; A Compelling Experience Customized For Me; Easy To Understand and Convenient to Use; Exceptional Customer Service; Transparency Throughout the Purchasing Process; A Relationship Built On Trust. Outer ring: Integrated With My Technology and Personal Network.

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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 there 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.

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

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

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

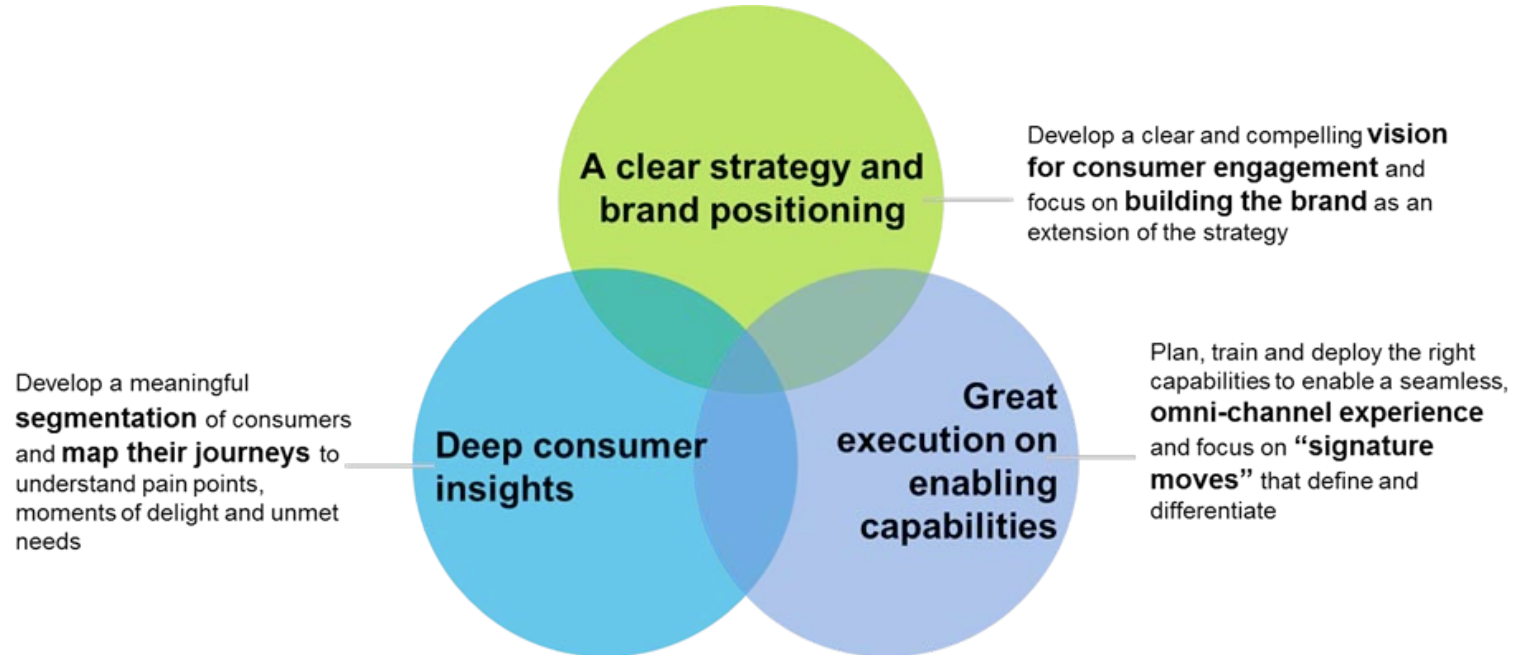|	
Direct Impacts	**Indirect Impacts**
Drive new referrals	*Foster better clinical outcomes*
Across industries, companies with higher NPS see more new volume generated by referrals from existing customers. Healthcare is local and word of mouth has a big impact	Nearly half of patients cannot correctly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

Improving the consumer's experience can position a system with the needed capabilities to win in a value-based marketplace

[1] "Patient comprehension of doctor-patient communication on discharge from the emergency department." *The Journal of Emergency Medicine.*
[2] "The Relationship Between HCAHPS Performance and Readmission Penalties." Press Ganey whitepaper.

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
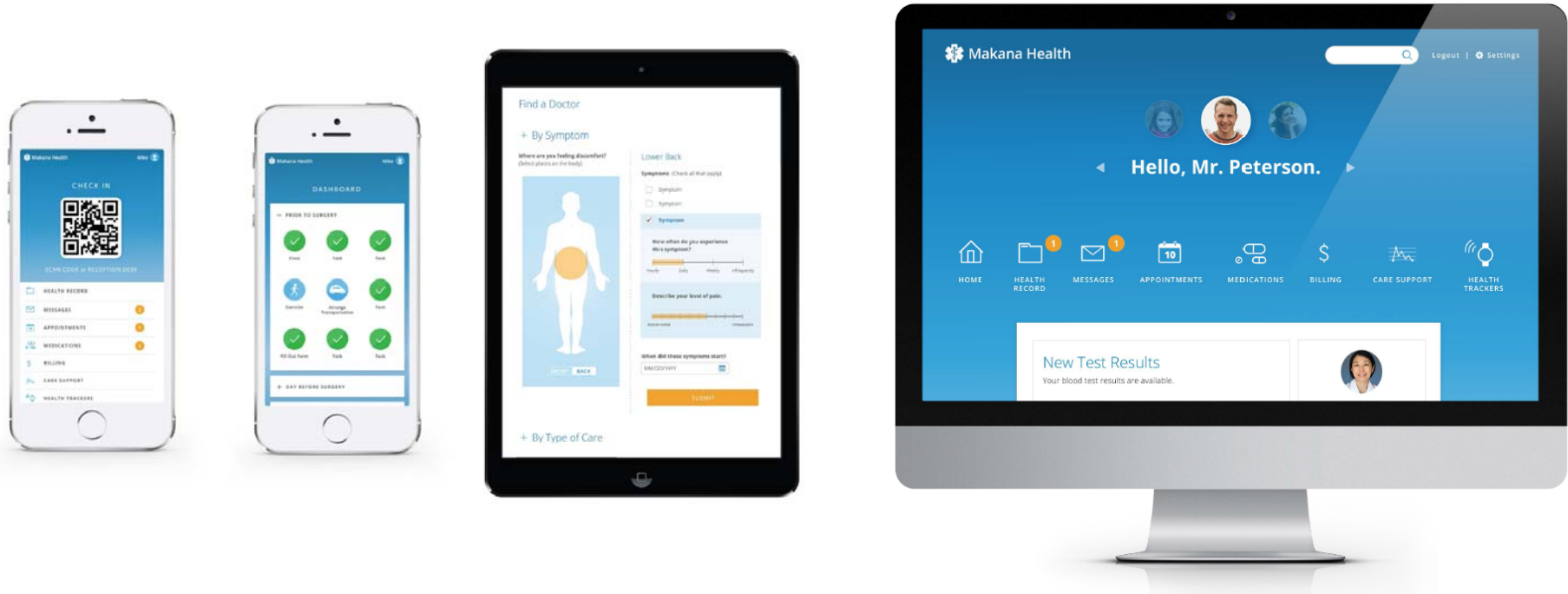
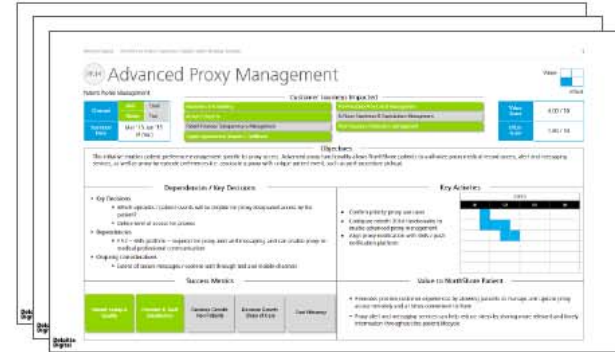# Digital Health Strategy and Roadmap Approach