

TRANSFORMING THE DIGITAL PATIENT EXPERIENCE

Sunil Venkataram, Senior Manager
Deloitte Consulting LLP

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A NEW ERA IN HEALTH CARE, DRIVEN BY CUSTOMERS

It used to be simple.

Get health insurance, visit doctors, do what they say and pay what it costs. Modern patients already arm themselves with self-service research. To be competitive, healthcare providers need to address increasingly public consumer perceptions of quality, convenience, and affordability.

Quality

Patients can now access **quality and safety ratings** for providers, including hospitals, thanks to Medicare and other payers, increasing **patient expectations**.

Cost and quality transparency data are driving major changes in patient behavior. Providers are adopting a customer service mindset, knowing that patients are empowered with data as never before.

Convenience

Gone are the days of time-consuming searches for the right providers. **Retail pharmacies** and **new entrants** provide efficient and timely access to care to patients when and where they want it, increasing **competition**.

Affordability

The emergence of **value-based care** and **MACRA** has placed a new emphasis on cost transparency in health care purchasing decisions

ATTITUDES/PREFERENCES OF THE HEALTHCARE CUSTOMER

Increasingly engaged healthcare customers have overall higher expectations around their care delivery experience, transforming how providers are designing and shaping their patient experience strategies.

IMPLICATIONS TO PROVIDER ORGANIZATIONS



**Personalization
Expected Via
Providers**



**Economically
Rational Coverage
& Care Choices**



**Convenience
Driven Access
to & Use of Care**



**Digitally Connected
to Manage
Healthcare**

FINANCIAL VALUE

Patient satisfaction accounts for a difference of **\$444 of net patient revenue** (per adj. patient day) between EXCELLENT and MODERATE hospitals



Net patient revenue (per adjusted patient day)

EXCELLENT vs MODERATE ratings account for



60% of the difference in financial performance

A **10%** increase in patients rating hospitals as EXCELLENT **increases margin by 1.5%**



THE COSTS OF INACTION CAN BE SIGNIFICANT



Leakage & Retention

Patient referral rates have been steadily increasing, but one study showed that **only up to 45% go to a partner hospital**, resulting in lost revenue for health care organizations. One study estimated that out of 7,000 primary care patients were referred to a specialist, **only 50% ever received the treatment** their PCP intended them to have due to scheduling and follow-up failures.

No-Shows

No-shows impact both the patient and the organization. Patient impacts include health risks, delayed care and poor continuity of care. Organizational impacts include loss of revenue, and **poor staff utilization and provider productivity** with estimates demonstrating missed appointments costing a single provider as much as **\$150,000 in lost revenue**.

Care and Cost Efficiency

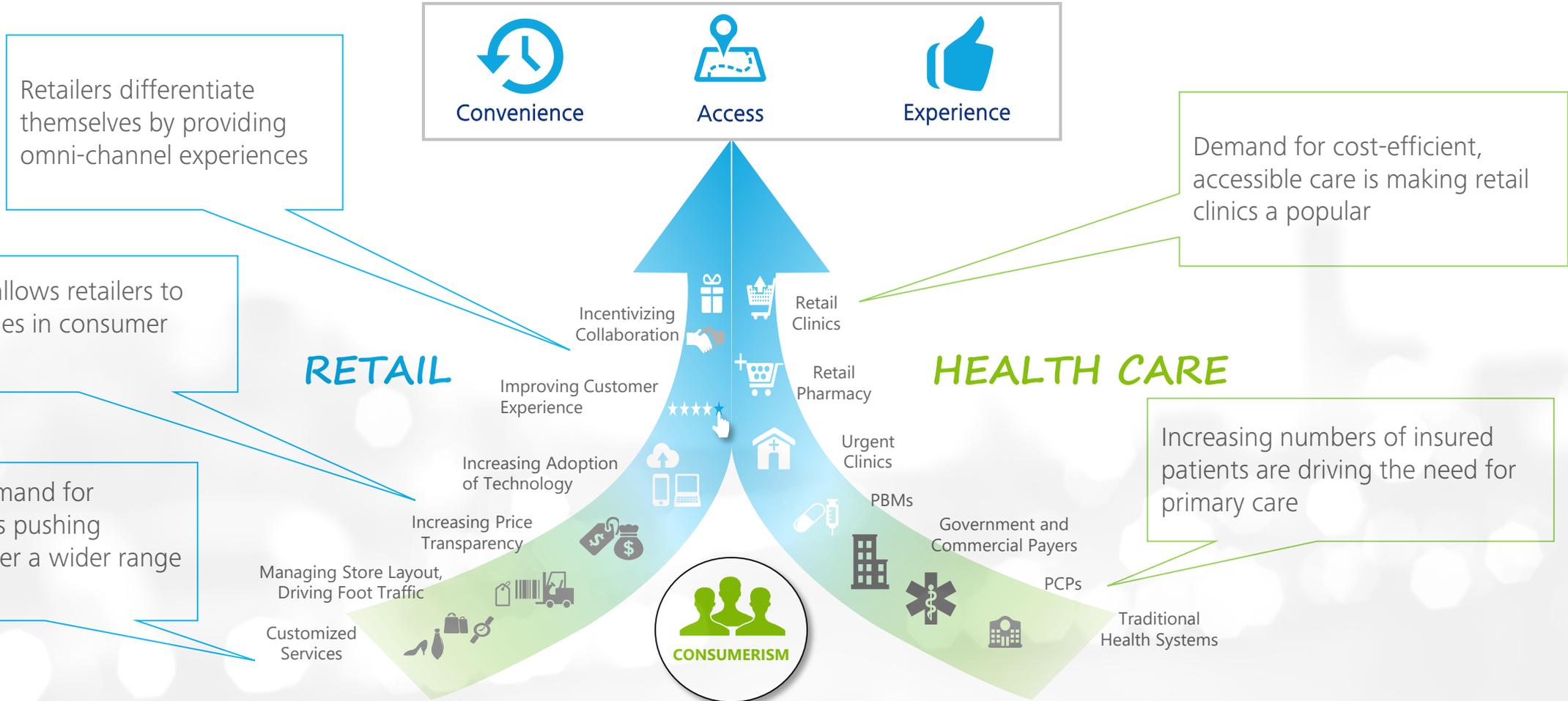
Long wait times and suboptimal outcomes can result in dissatisfied patients, which in turn can hurt profits. Studies show patient perceptions account for **17-27% of variations in financial performance**. Moreover, a **patient lifetime value of \$4.3M** for the average US household could be at risk as a result of inefficiencies that contribute to patient dissatisfaction.

OUR PERSPECTIVE



HEALTHCARE PROVIDERS ARE BEGINNING TO RESPOND

Health care providers are responding to consumer needs by expanding into new health and wellness businesses by focusing on convenience, access, and experience



TRANSFORMING THE PATIENT EXPERIENCE

Loyalty & Customization

- Complete patient experience survey
- Decide to switch providers
- Receive notification on other provider services

"I will come back to this facility for my healthcare needs!"

Care Management & Wellness

- Fill prescription
- Conduct follow-ups with provider
- Continue wellness activities
- Review at-home care / medication regimen
- Assign proxy and grant access

"I received a follow-up call from a nurse shortly after my visit"

Billing & Payment

- Understand billing / payment
- Make payment
- Escalate billing questions

"Billing provided great customer service"

Check-out & Discharge

- Confirm next appointment
- Download App
- Confirm discharge / treatment instructions

"I left the appointment room more comfortable than when I entered because of the quality of care and answers I received"

Awareness & Consideration

- Become aware of healthcare needs
- Research provider services and reviews
- Receive additional information
- Estimate cost of service

"The provider's services, hours of operation, and contact information are easy to locate online"

Schedule & Registration

- Schedule service
- Payment estimator
- Confirm pre-authorizations
- Complete patient typing survey

"It was easy to locate and reserve an appointment time. Planning tools are clearly available."

Pre-arrival

- Appointment reminder
- Complete pre-arrival forms
- Follow pre-arrival instructions (i.e. fasting)
- Travel to provider facility

"I felt prepared and comfortable heading into my appointment"

Arrival & Check-in

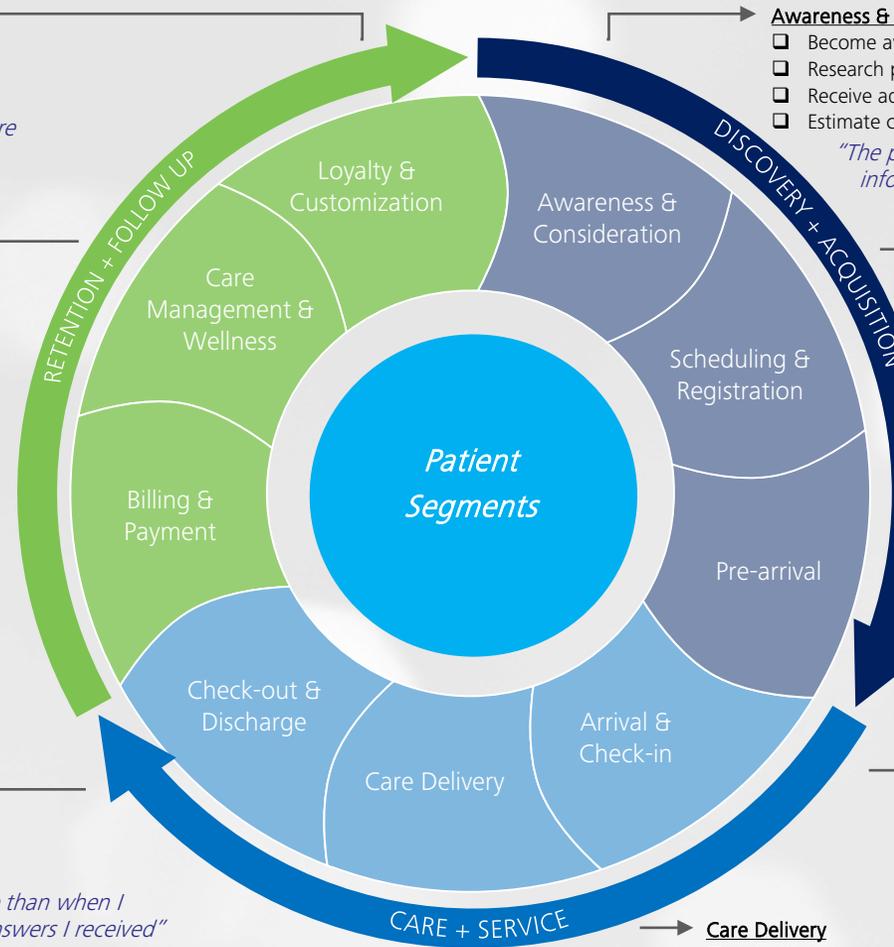
- Arrive at check-in desk
- Provide identification and insurance
- Complete forms
- Wait for service

"The facility already had my previous forms on file – the check in process was quick and painless"

Care Delivery

- Check vitals
- Wait for doctor visit
- See practitioner
- Review treatment options

"The doctor and nurses were friendly, attentive, and patient during my visit"



"[]" – Illustrative desired experiences

CREATING A CUSTOMER-CENTERED RELATIONSHIP

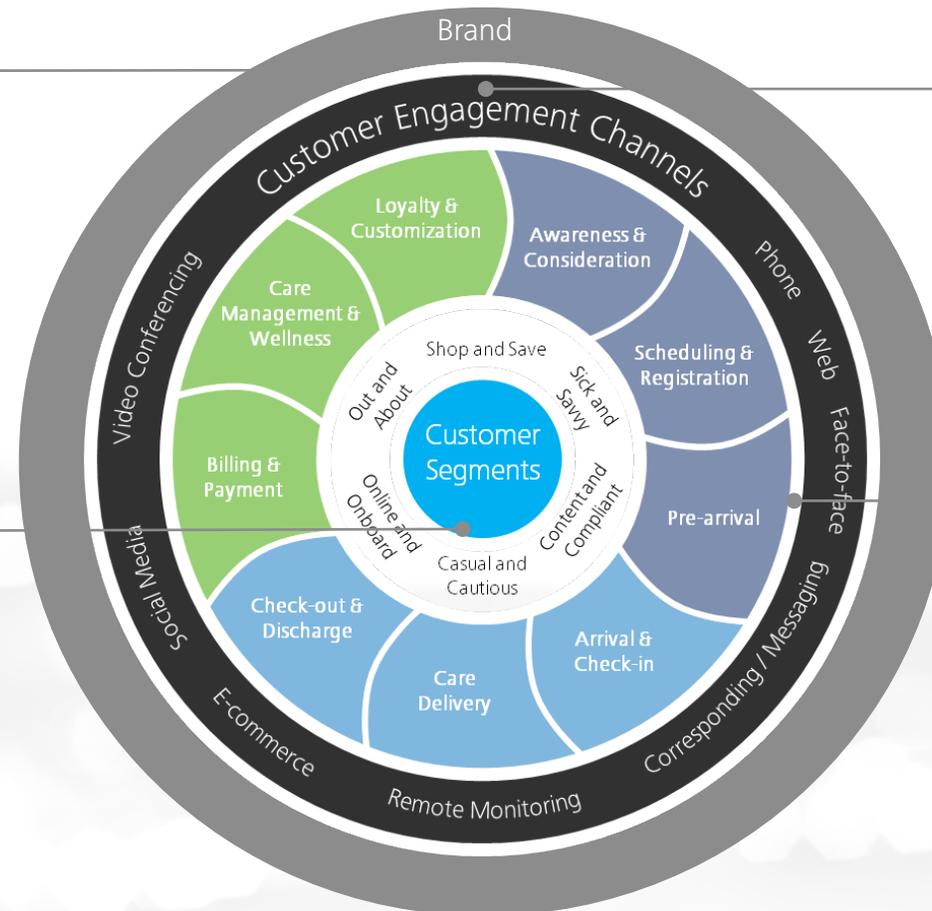
Provider organizations are beginning to extend the focus beyond price and quality of care to create a **customer-centered relationship** across the lifecycle of interactions and channels of customer engagement, and CRM tools are critical to achieve these goals.

Brand

The brand, which defines **what the organization stands for** and how to **interact with users**, is critical to strengthen and create “stickiness” with the consumer

Insights

Develop a clear and compelling **vision for leveraging consumer insights** and focus on **building the brand**



Engagement

Plan, train and deploy the right capabilities to enable seamless, **omni-channel engagement** and focus on “signature moves” that define and differentiate the organization

Experience

Generate meaningful consumer **insights** and **map their journeys** to understand pain points, moments of delight and unmet needs across multiple interactions

CUSTOMER EXPERIENCE DRIVES MEASURABLE VALUE

Delivering a better Customer Experience drives better customer outcomes and measurable business value



PROMOTION

Customers tend to mention a good brand experience to an average of nine people, but will talk about a bad one to **16 people**²



SPEND

Customers who have the best past experiences spend **140%** more compared to those who have the poorest past experiences³



TENURE

Customers who have positive customer experiences will likely remain customers for **5 years** longer than customers with negative customer experiences⁴



COST TO SERVE

Delivering great experiences reduces the cost to serve customers by as much as **33%**⁵

¹The Business Impact of Customer Experience ,” Forrester, 2014

²Customer Experience is the Future of Marketing,” Forbes, 2015

^{3,4,5}The Value of Customer Experience, Quantified,” Harvard Business Review, 2014

KEVIN'S STORY: ACCESSING CARE

PROVIDE ME WITH OPTIONS

TRANSPARENT PAYMENT INFO

UNDERSTAND MY GOALS

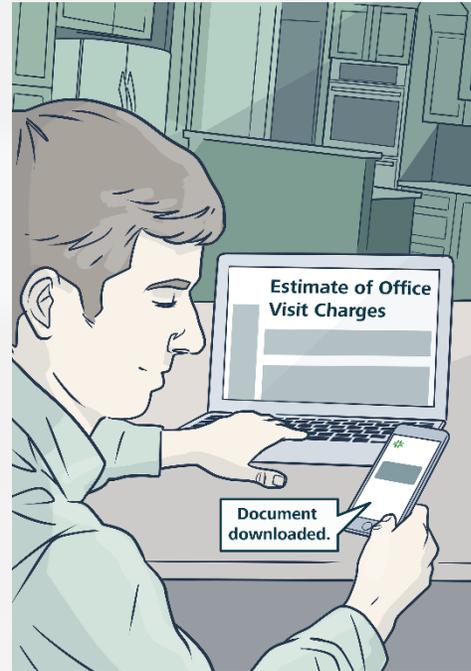
HELP ME REACH MY GOALS



Kevin recently scheduled an appointment for an annual check up with his Makana doctor. The day before the appointment, he receives a text message reminder giving him the option to reschedule if he can no longer make that time. Kevin realizes he has a conflict, logs into his customer portal, and uses the click-to-chat option to select another appointment later.

APPOINTMENT MANAGEMENT

MULTI-CHANNEL SERVICE SUPPORT



While online, Kevin notices he has the option to access an estimate of his health benefits and the payment required for his upcoming visit. He downloads the form and saves a copy to his phone so he has a record of his co-pay estimate. He also sends a secure message to his doctor to say that he's been a bit concerned about his nutrition lately and would appreciate any advice.

CUSTOMER PORTAL

BENEFIT + PAYMENT OVERVIEW



Kevin opts to take the call with his doctor from his iPad. It was easy to get the program set up, and he's able to clearly see and hear his doctor. His doctor saw Kevin's message about nutrition and has prepared a list of suggestions for him, which they discuss on the call.

MULTI-CHANNEL CARE ACCESS

PERSONALIZED, EMPATHETIC CARE



After the call, Kevin accesses his customer portal to review his doctor's list of nutrition suggestions. One of the suggestions includes setting health goals, which Kevin can manage and monitor through the portal. Kevin follows the setup guide to log his goals and edits his preferences so he can receive reminders and personalized content through his mobile phone.

GOAL-ORIENTED SUPPORT

SELF-DRIVEN EDUCATION OPTIONS

FUTURE
SCENARIO

KEY
CAPABILITIES

FRANK'S STORY: SCHEDULING CARE

CONNECT TO THE COMMUNITY



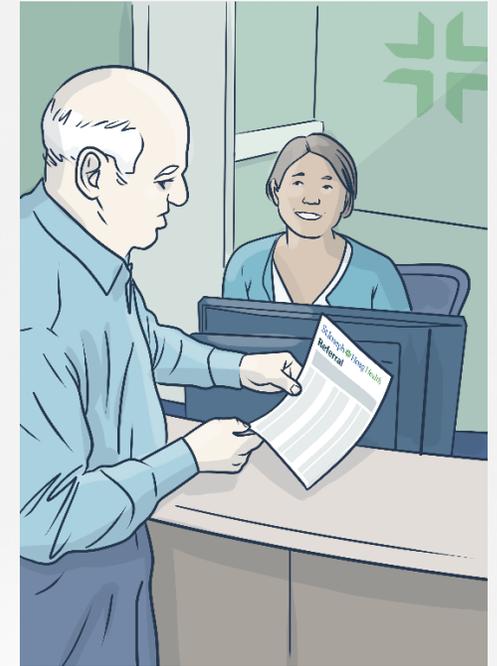
ACCESS WHEN I NEED IT



KNOW ME



TAKE CARE OF THE NEXT STEPS



FUTURE SCENARIO

Frank recently joined a Makana alumni group for patients with total joint replacement. While attending a session on improving mobility at his local golf course, he begins talking to a member of his group about recent sharp pains in his lower back. His friend recommends that he should set up time to see the doctor.

When Frank calls to schedule an appointment, the person on the phone is friendly, can see Frank's history with Makana, and asks pointed questions about Frank's condition. They recommend that Frank see a doctor as soon as possible, but Frank's GP is on vacation. The representative offers Frank the option to see another doctor that has immediate availability and Frank agrees.

The doctor Frank sees greets him by name and asks him how his golf game is going. He was able to review Frank's personal profile and understands that he recently had a joint replaced. The doctor prescribes a treatment plan for Frank's pain that includes medication and physical therapy.

Before he leaves the office, the office staff books the physical therapy appointment for Frank. She notices that Frank has a blood test booked for the following Tuesday and suggests they schedule this appointment for the time slot just after so he can avoid making multiple trips to the medical clinic.

KEY CAPABILITIES

SOCIAL NETWORKS + ALUMNI GROUPS
COMMUNITY COLLABORATIONS

DECISION-MAKING SUPPORT
INSTANT SCHEDULING

PERSONAL PROFILE
PERSONALIZED, EMPATHETIC CARE

PROACTIVE FOLLOW UP
INSTANT SCHEDULING

QUANTIFYING THE VALUE TO PROVIDER ORGANIZATIONS

Care Connect can address providers' pain points by enhancing their ability to attract, engage, and retain patients. Care Connect enables provider organizations to maximize resources to increase reach to new patients in their market while improving loyalty and retention of existing patients

CRM-Enabled Solutions



Retain Patients & Reduce Leakage

Referral optimization and triaged scheduling management to understand patient leakage patterns, identify providers likely to refer out-of-network, and guide patients to confirmed visits



Reduce No-Shows

Enhanced **patient communication, transportation, and check-in tools** prior to appointments to minimize no-show risk



Improve Patient Satisfaction

Improved patient self-service, tracking, and reporting to reallocate resources toward reducing patient wait times and increasing appointment access

Potential Impact

Every **1% of retention can equal \$1 million** of additional revenue for a health care system

Research indicates that getting current patients to return for future care costs 90% less to attracting new patients

Appointment reminders **saved over \$275,000 (\$150 per appointment)** for a single Kaiser clinic during a one-month pilot

Improved diagnostic reporting resulting in fewer errors and **better outcomes**
Increase in **patient satisfaction by ~10%, which determines 30%** of Medicare's value-based payments

Realized Benefits

Average Percent Improvements Reported by Organizations:*

+35%
Customer Retention

+45%
Agent Productivity

+35-40%
Patient Satisfaction

35 - 40%
Decrease in Support Costs

*Independent SFDC Study March 2013

DELOITTE IS FOCUSED ON HELPING CLIENTS TACKLE THEIR MOST COMPLEX CHALLENGES WITH SALESFORCE TECHNOLOGY AND IN THE HEALTH CARE SECTOR – AND WE’VE EARNED MANY AWARDS DOING SO – WE’RE RECOGNIZED AS LEADERS BY GARTNER, FORRESTER, KENNEDY, AND IDC

CRM & Customer Experience

“Deloitte brings together a **full set of capabilities focused on transforming the front office of customers** that includes strategy, business process consulting, CRM technology, digital design and analytics.”

- Gartner

“Deloitte has access and credibility with business buyers due to its focus on business transformation”...“**orientation toward getting business results** enable[s] differentiation from more-IT-oriented competitors.”

- Gartner

Four-time consecutive leader in Gartner Magic Quadrant for CRM Service Providers in North America (2006 – 10) and worldwide (2012, 2013, 2014, 2015)

Forrester named Deloitte as a leader in Salesforce.com implementations (June 2013), and the leader in business technology transformation (2012)

IDC recognizes Deloitte as **the leader in Worldwide Digital Enterprise Strategy** Consulting Services (March 2015)

We’ve been a **Global Platinum Alliance Partner of Salesforce.com** since 2006

#1 Worldwide in 2015 & 2016 CRM and CE Magic Quadrant



Health Care

Health Plans

- Nearly 85% of the Top 25 US Health Plans (as ranked by AIS’s Directory of Health Plans)
- Nearly 60% of the Nation’s Blue Cross Blue Shield Plans
- 80% of the Largest Regional Plans (AIS’s Directory of Health Plans)
- Nearly 90% of the Nation’s Largest Blue Cross Blue Shield Plans (AIS’s Directory of Health Plans)
- 80% of the Largest Provider Sponsored Plans (HealthLeaders)

Providers

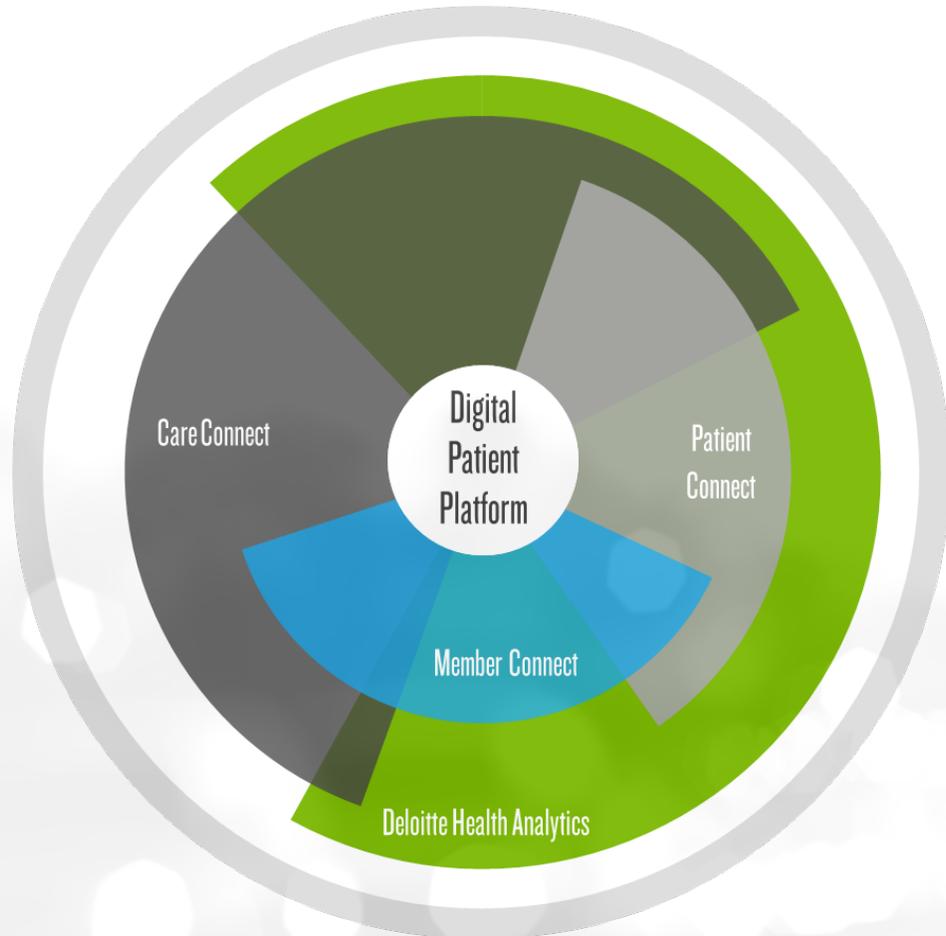
- 14 of the 15 Honor Roll Hospitals (US News and World Report)
- 10 of the 10 Largest Health Care Systems (Mdrn Hthcre)
- 9 of the 9 Largest For-Profit Healthcare Systems (Modern Healthcare)
- 10 of the 10 Largest Catholic Healthcare Systems (Modern Healthcare)
- 9 out of 10 of the Best Children’s Hospitals (US News and World Report)

Consistent performance and growth:

- Numerous third party accolades citing Deloitte as a leader in LSHC market:
 - Deloitte ranked #3 by Vault for best consulting firms for health care consulting (2016 ranking)
 - Deloitte Consulting named a global leader in Private Healthcare Consulting by Kennedy (2014)
 - Deloitte ranked #1 globally in Healthcare Risk Consulting based on revenue and capabilities by Kennedy (2014)
 - Deloitte named a global leader in Life Sciences Industry Consulting by Kennedy (2014)

THE DELOITTE DIGITAL PATIENT PLATFORM

Our digital patient platform consists of a core foundation and customized FullForce solutions that extends the Salesforce platform with Health Care Providers, Health Plans and Life Sciences sector-specific baked in best-practices and capabilities



Care Connect

Care Connect helps provider organizations increase patient volume and deliver improved patient experiences through efficient referral management, leakage prevention and consistent engagement



Member Connect

Member Connect helps health plan organizations attract, acquire, serve and engage members, providers, brokers throughout the full customer experience lifecycle



Patient Connect

Patient Connect helps life sciences organizations build deeper relationships with patients and supports them in their clinical and financial journeys



Deloitte Health Analytics

Deloitte's Health Analytics solutions helps provider organizations enhance research productivity, apply real-world evidence and drive performance improvement through tailored analytics

CARE CONNECT: PROVIDER ENGAGEMENT PLATFORM

Below highlights a subset of the benefits of our Care Connect accelerator solution for Provider organizations

-  **Cloud Enabled.**

A highly scalable and efficient service and sales cloud solution – with no hardware or software to manage.
-  **Baked-In Best Practices.**

Our knowledge, plus lessons learned, based on years of deep sector experience in enterprise healthcare.
-  **Integrated Technologies.**

A more efficient and nimble technology integration, with platform consistency across all systems.
-  **Operating Cost.**

A lower cost of operations with technology-enabled business processes that improve functionality.
-  **Streamlined Communications.**

A seamless Patient experience via multi-channel communication with one-view agent access.
-  **Increased Engagement.**

Incentivizing, loyalty-driving Patient connections to wearable devices, apps, self-service tools, remote care, etc.
-  **Automated Marketing.**

Highly effective targeting, with multi-channel campaign marketing and individualized sales cycles.
-  **360° View.**

Knowing customers via engagement, behavioral, and social data, in the context of longitudinal PHRs.

DELOITTE DIGITAL: HIMSS 2017

Additional Activities	Date / Time / Location	Details
Deloitte Digital, Salesforce, and Forrester Panel: <i>Transforming the Digital Experience</i>	Monday 2/20 3:30 - 4:30 pm EST Room 202B	Joint speaking event sponsored by Salesforce, expected attendance 50+
Care Connect Demo at Salesforce Booth: <i>Care Connect: The Digital Patient Experience</i>	Tuesday 2/21 2:00 PM EST Salesforce Trailblazer Theater BOOTH(S): 2675	Demonstration of Care Connect at SFDC booth

55" touch screen for Interactive Patient Journeys



Q + A



Deloitte.
Digital