At the heart of health care: When patients become engaged power players

The Dbriefs Health Science series
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Agenda

• Consumerism in health care: Our point of view
• Trends: Using digital to engage with customers
• Moving forward: What does it all mean?
Consumerism in health care
Our point of view
Patients and providers interactions have evolved from transactional to highly engaged

**Interaction dynamics:**
**Transactional and episodic**

**Consumer expectations examples:**
- “Cover my condition and health care provider costs”
- “Process/reimburse my claim quickly”

**Interaction dynamics:**
**Relational and holistic**

**Consumer expectations examples:**
- “I am unique, give me personalized tools and support to manage my health”
- “Be available 24x7 through the medium of my choice”
- “Don’t expect me to be the communication conduit between healthcare providers and the health plan”
- “Treat me like a person, not a condition”
Health industry change continues to drive opportunity

As a result many health care and life sciences organizations are continuing their drive toward new customer-centered patient engagement for improved patient outcomes.
Polling question #1

In your opinion, where can health care companies best enable patients?

• Through therapies and by connecting with patients to provide access to and support with their care

• Financially by helping remove financial barriers to receiving care and treatments

• Clinically by providing patients with a point of contact during their care

• General engagement by supporting patients’ unique treatment journeys and enable better long-term treatment outcomes

• Education by delivering educational insights to inform patient decision-making and behaviors
New patient enablement typically revolves around five key areas

**Therapy:** Connecting with patients to provide access to and support with their care

**Financial:** Helping remove financial barriers to starting and staying on therapy

**Clinical:** Providing patients with a point of contact during their care

**Engagement:** Supporting patients’ unique treatment journeys and enable better long-term treatment outcomes

**Education:** Delivering educational insights to inform patient decision-making and behaviors

**Delivering consistent service to patients and health care providers can help build trust and loyalty**
Ways to help enable personalized patient care

- **Accelerate access**
  Improve patient access to therapy and provide high-touch, consistent patient interactions across shared business processes and therapeutic programs.

- **Inform patient insights**
  Increase insights into patient treatment and interactions to demonstrate value to health plans and improve drug efficacy.

- **Health care provider partnerships**
  Deliver value to providers and partnerships through shared patient insights and a platform for care team collaboration; facilitate interactions between providers and patients.

- **Improve adherence**
  Leverage tools to engage and educate patients; act proactively to help ensure product, therapy, and care plan adherence, reducing discontinuation.
Use case: Using adherence analytics data on a centralized platform to tailor patient interventions based on past interactions

The model predicts discontinuation and segments patients into risk groups using information like clinical attributes, attitudes, shipments

While some patient groups have similar discontinuation risk, the model identifies key differentiating factors

Analyzing “patient pathways” provides insight into key discontinuation risk drivers, and can be applied to build risk mitigation strategies

Use data to segment the population and target adherence programs appropriately

Providers work to improve adherence to improve outcomes – and subsequently their quality metrics

CMS measures and rewards medication adherence for three conditions (diabetes, hypertension, cholesterol) under (MA and Part D) health plans

Life sciences companies are being asked to demonstrate real-world value of their products and improving adherence improves those scores
Polling question #2

To what extent is your organization or organizations you interact with partnering with other ecosystem players (e.g., providers, retail pharmacies, plans) to deliver a digitally-enabled experience to drive consumer engagement?

• Heavily investing and already partnered with multiple ecosystem players
• Moderate investment with a smaller number ecosystem partners
• No current investment, but plans to begin investing in this soon
• No current investment and no plans to work towards these partnerships
• Other/no opinion
Trends
Using digital to engage with customers
Insights gathered from a Deloitte Digital survey confirms commercial leaders see the gap between their current capabilities and desired state.

**Today**

Fragmented execution, and duplicative solutions and capabilities

**Tomorrow**

Coordinated patient engagement supported by an enterprise and integrated patient services platform

**Organizational readiness**

Rate your organization’s readiness today in terms of implementing effective patient services/engagement. (*Where 1 is not prepared and 5 is extremely ready*)

On the same scale, where do you feel your organization needs to be in two years? (*Where 1 is not prepared and 5 is extremely ready*)

*Questions answered by ~30 respondents in 2016 Eye for Pharma Conference*
Digital and technology are important but they balanced with other consumer priorities

1. Doctor or other health care providers who spend time with me and does not rush

2nd priority
Economically rational coverage and care choices

3rd priority
Convenience-driven access to and use of care

48. Ability to schedule an appointment with a doctor or hospital online or via mobile device

4th priority
Digitally connected to manage health care

6. Clear, helpful information about my diagnoses and conditions

Source: Deloitte 2016 Consumer Priorities in Health Care Survey
Polling question #3

As a health care consumer, do you use or digital platforms to:

• Refill a prescription
• Measure health and fitness improvements
• Monitor a health issue
• Check the cost of care services
• More than one of the above
• None of the above
Key findings from the 2016 Deloitte Survey of US Health Care Consumers

1. **Consumers have an appetite for using technology-enabled care.**
   Seven in ten consumers are likely to use at least one of the technologies we presented.

2. **Telemedicine, in which half of the respondents show interest, is the most popular technology.**
   Respondents are most interested in using it for post-surgical care and chronic disease monitoring.

3. **Particular subgroups are especially keen on these technologies.**
   We saw this especially in those who have chronic diseases, Millennials using telemedicine, and Seniors using remote monitoring.

4. **Caregivers are a key population.**
   Consumers who are caregivers say they are most likely to use sensor technology (the IoT) when caring for others rather than for themselves. Experienced caregivers are more likely to use telemedicine and remote monitoring technology than non-caregivers.

5. **Consumers demand high-quality, personalized care.**
   They also want assurance that their personal information will be safe.

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Consumers are influenced by technologies in other industries and increasingly using technologies for health and fitness purposes though still lagging behind other uses.

- Shopping (e.g., for clothing, groceries, books): 86%
- Mobile or online banking for personal finance (e.g., checking balance, depositing checks, transferring funds): 72%
- Tax filing: 51%
- Financial and/or retirement planning: 35%
- Refill a prescription (among current Rx users): 58%
- Measure fitness and health improvement goals (e.g., exercise, diet, weight, sleep): 32%
- Pay a medical bill online: 31%
- Monitor health issues (e.g., blood sugar, blood pressure, breathing function, mood): 24%
- Check on the costs of care using an online cost-tracking tool provided by a health insurer: 18%
- Receive alerts or reminders to take medication or engage in some other form of treatment: 17%
- Measure, record, or transmit data about medication you are taking or other forms of treatment: 15%

Chart shows percentage of respondents who used technology or went online to perform the activity in the last year.

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Moving forward

What does this all mean?
With a coordinated patient services platform, companies can leverage data as a strategic asset

Key trends

Hybrid service delivery models using a single in-house platform:
• Employing a combination of in-house resources and outsourced partners to execute different services is the most common and recommended based on a company’s core competencies
• Life sciences companies can take back control of their data by building a common, integrated platform for all of their vendors to use

Cloud-based platforms:
• Companies can implement cloud-based platforms in order to centrally control data access
• Cloud solutions can allow companies to ensure data quality, easily generate real-time reports, and quickly disseminate changes

A single, cloud-based platform can allow for centralized data with the flexibility to deliver patient services capabilities either in-house or via partners

Based on internal Deloitte analysis
Plans are discerning what types of digital interactions to invest in.

Findings from the consumer experience study suggest that health plans need to ensure they are integrated to address consumer priorities.

**What surveyed consumers don’t want from digital today**

- Easy access to my medical records online and via my mobile device (#43)
- Ability to schedule an appointment with a doctor or hospital online or via my mobile device (#48)
- Ability to share data from my personal health monitoring tools and trackers with my doctor or family (#50)
- Web chat that enables me to quickly and easily resolve my issues (#59)
- Advice on reliable online resources and/or social networking communities for health information and support (#61)
- Access to electronic tools and trackers for managing my health (#62)

**What surveyed consumers may want from digital tomorrow**

- Pre-appointment check-in that includes personalized questions and minimizes wait time when they arrive at the doctor
- Cost transparency tools providers can access with patients to enable discussion about the financial cost of various treatment options
- An integrated portal that links different doctors and parts of the health ecosystem in one place
- Solution that facilitates the transfer of medical records when a consumer sees a new provider
- Text communication with their doctor so that they can ask ongoing questions about their condition and see that their providers care

Sources: Deloitte “2016 Healthcare Consumer Experience Survey”
Life Sciences companies are making progress
But to play a substantive role, companies should consider responding to the changing patient engagement dynamic

**Interaction dynamic: Transactional and episodic**
Fragmented execution, and duplicative solutions and capabilities

**Interaction dynamic: Relational and holistic**
Coordinated patient engagement supported by an enterprise and integrated patient services platform

- Greater patient empowerment
- Emphasis on delivering value to the patient
- Shift towards relational and holistic care
- Consumerization of the patient

Varying coverage and capability across the patient engagement landscape by disease state and capability
Providers should view performance through a consumer lens

Understand customers and design around them

Leverage technology & digital

Discern market dynamics & act strategically

Align customer & business priorities

Additionally, patient satisfaction accounts for a difference of $444 of net patient revenue (per adjusted patient day) between Excellent and Moderate hospitals

Low ratings

Moderate ratings

Excellent ratings

Net patient revenue (per adjusted patient day)

Source: David Betts, Andreea Balan-Cohen, Navneet Kumar, Maulesh Shukla, Value of Patient Experience April 2016
Polling question #4

In your opinion, where is the greatest opportunity for improved customer satisfaction?

• Providing user friendly digital and app-based services
• Longer doctor appointments
• Information on cost of treatment prior to receiving it
• Improved care coordination between providers, plans and life sciences companies
• Other/no opinion
The optimized patient journey: Care coordination across sectors
Coordination of care can delay a patient’s movement across the care continuum, improving their quality of life and driving down the cost of care

Mary, a diabetes patient, is at risk for complications. She uses insulin and high-blood pressure meds. As she gets older and it becomes more difficult, she only goes to the doctor when sick. Without regular screening her blood sugar spikes and she ends up in the ICU. As her condition worsens, her family can no longer care for her at home. Interventions can reduce the total cost of care.

Accelerate access
Inform patient insights
Provider-plan-pharma partnerships
Improve adherence

Interventions can reduce the total cost of care

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Considerations moving forward
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How social determinants can help manage costs and improve patient outcomes
Eligible viewers may now download CPE certificates.

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