



# PATIENT-CENTRIC HEALTHCARE

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## Introduction

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With the constant state of disruption in the healthcare landscape, the industry has seen a rapid adoption and implementation of digital and technology solutions. This shift in incorporating more technology into healthcare settings allows patients to become more invested in their health and healthcare providers to change the way care is tracked and provided, which gives providers an opportunity to effectively offer an outcomes-based approach to care. With the exorbitant amount of data, providers are now able to utilize predictive analytics to offer better treatment options pre-visit, onsite, and post-discharge.

While there are many trends affecting the industry, there are four factors – value-based care, predictive medicine, the new digital customer and patient experience – that will be the most influential in leading the transformation toward patient-centric healthcare.



# Healthcare Trends Shaping the Industry

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## SHIFT TO VALUE-BASED CARE

THE US SPENDS  
**16.9%**  
OF ITS GDP ON HEALTHCARE  
(ALMOST TWICE THE OECD AVERAGE OF 9%) AND CONSISTENTLY RANKS LOW COMPARED TO OTHER DEVELOPED NATIONS IN TERMS OF PERFORMANCE (QUALITY, ACCESS, EFFICIENCY, EQUITY AND HEALTH OUTCOMES).<sup>1</sup>

ACCORDING TO A 2016 SURVEY OF EXECUTIVES AT HEALTH PROVIDER ORGANIZATIONS, ONLY  
**27%**  
HAVE COMPLETED VALUE-BASED PILOT PROGRAMS  
OR ARE AT SOME STAGE OF A ROLLOUT.<sup>2</sup>

According to these statistics and many others, it's clear that healthcare organizations are struggling to transform traditional "siloes" care models into more "connected" care models. Investments in technology solutions that increase care coordination and platforms that aggregate and analyze data across healthcare networks can help organizations gain a shared view of the patient across care settings and over time. For a care team, this easily accessible patient data could increase effective communication and decrease costly errors. A recent report indicates that 2,000 patient deaths and \$1.7 billion in malpractice costs could have been avoided if medical staff and patients communicated better.<sup>3</sup>

To meet challenges stemming from the shift to value-based care, providers need to invest in solutions that assist with data integration, predictive medicine and care management throughout the care continuum. Additionally, healthcare and hospital systems need the analytics capabilities in place to accurately measure outcomes against goals to evaluate performance.

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<sup>1</sup> OECD Health Statistics 2016

<sup>2</sup> Deloitte 2016 Survey of US Physicians

<sup>3</sup> Malpractice Risks in Communication Failures, 2015 Annual Benchmarking Report, CRICO Strategies

# PREDICTIVE MEDICINE & THE IMPORTANCE OF ANALYTICS

With the shift to value-based care, physicians need to utilize predictive analytics and population health data to gain a more holistic view of patients, conditions and effective treatment.



## EIGHT OUT OF 10 HOSPITAL LEADERS BELIEVE

that the future of healthcare could be significantly improved through the use of predictive analytics, but only 31% of hospitals have used the technology for more than a year.<sup>4</sup>

So what's the issue? Current users and non-users of predictive analytics cite that the main challenge is a lack of proper tools and infrastructure to support and analyze data effectively.

While adopting technology solutions and data infrastructure may seem like a hefty initial investment, providers that want to remain competitive aren't left with much of a choice. Without the ability to manage data effectively, healthcare organizations will remain in an antiquated, siloed care model without a common view of patients, and executives will be unable to make better business-driven decisions. By correlating and integrating data from genetic sequencing, population health and predictive analytics (such as the lifestyle, environment, family history and dietary activities of a patient), physicians will be equipped with more information to better treat the patient. More data yields better patient outcomes, which yields fewer readmissions and lower costs for providers.

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<sup>4</sup> Health Catalyst August 2016 online survey

# THE NEW DIGITAL HEALTHCARE CONSUMER

Empowered customers are shaping industries beyond medicine, and every sector is trying to adjust its business strategy to keep up. What does that mean for healthcare? Patients are becoming more involved with their health – asking more questions, surveying their options and conducting their own online research. Just as the financial services industry is at risk of the complete elimination of traditional brick-and-mortar banks in lieu of robo-advisors and mobile apps, the healthcare industry is faced with the challenge of meeting patients where they are – not just in a healthcare setting. To keep up, care organizations must respond to patient needs more quickly and at any time, day or night.

With the right technology in place, healthcare providers have a great opportunity to retain new patients and transform the experience.



**76% OF US ADULTS**

still use the phone to set up an appointment.



**59% OF ADULTS**

say they would choose a primary care doctor who offers a patient mobile app.



**62% OF PATIENTS**

rely on their doctors to keep track of health records.



**62% OF PATIENTS**

would choose a primary care physician who uses data from their wearable devices to manage outcomes.<sup>5</sup>

It's no surprise that a common frustration among patients is unfamiliarity with insurance coverage or incurred costs. This lack of understanding could be that patients aren't asking providers the right questions, or that employers and payors aren't effectively communicating the benefits. What we do know is that 66% of consumers have never had a conversation with a physician or nurse about the price of a visit, and 60% of consumers have never discussed a procedure cost.<sup>6</sup> With this concept of the new digital healthcare consumer, we can expect patients to be more vocal about their coverage options, so therefore payors and providers should be prepared to provide better education in explaining benefits.

A grave disconnect continues to grow between patient needs and the resources provided by care organizations. Smaller providers without the ability to develop technology solutions are losing money to larger hospital systems. As consumers become even more empowered, healthcare systems that neglect to meet patient demands will be left behind.

<sup>5</sup> Salesforce Research, Connected Patients Report 2016

<sup>6</sup> HRI Consumer Survey, PwC, 2015

# PATIENT EXPERIENCE THROUGHOUT THE CARE CONTINUUM

As with any consumer-facing industry, it's increasingly important for healthcare systems to provide a positive and engaging patient experience to gain a competitive advantage. This is yet another reason why providers need effective data management tools to gain insight into what constitutes a "positive patient experience" and then follow up with patients to track outcomes and gather feedback.

## THE FOLLOWING FACTORS RANKED AMONG US ADULTS AS VERY IMPORTANT TO CONTRIBUTING TO A POSITIVE CARE EXPERIENCE<sup>7</sup>:

THE DOCTOR'S OVERALL KNOWLEDGE, TRAINING AND EXPERTISE	83%	THE DOCTOR'S ABILITY TO ACCESS OVERALL MEDICAL HISTORY	69%
TIME SPENT WITH THE DOCTOR	58%	EASE OF MAKING AN APPOINTMENT	49%
SIMPLE BILLING PROCESSES	45%	THE ABILITY TO COMMUNICATE WITH THE DOCTOR OUTSIDE OF THE ACTUAL APPOINTMENT	44%

With the proper data in place and the infrastructure to support it, information captured along the full care continuum can help providers make adjustments to improve the patient experience and more accurately track health outcomes by comparing pre-visit and post-discharge conditions. Typically when a patient reflects on his or her visit to the doctor, the pre- and post-visit experience is very important. If a patient is asked to fill out five different forms in the waiting room or if the care team neglects to follow up with a patient after a procedure, the experience reflects negatively on the doctor no matter how much knowledge he or she has. For example, among people who have been hospitalized or had a family member in the hospital over the last few years, 61% believe improvements could have been made in the post-discharge process, and 31% believe there could have been better communication with their primary care doctor.<sup>8</sup>

When evaluating whether a provider is providing a positive experience for patients, don't underestimate the value in looking beyond the onsite visit starting with the initial pain point and ending with full recovery.

<sup>7</sup> The Harris Poll, January 2016

<sup>8</sup> Salesforce Research, Connected Patients Report 2016

# The Driving Forces Behind Healthcare Transformation: Digital Technologies, Big Data & Interoperability

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These four factors – value-based care, predictive medicine, the new digital customer and patient experience – are driving healthcare systems to view digital transformation as one and the same with consumer transformation. As consumers continue to expect the healthcare industry to offer the same customized digital experience as the retail or banking industries, data-driven decisions and online guidance are more important than almost anything else.

Consumers want to feel in control of their health by making appointments anytime and anywhere, viewing health records, communicating with doctors, and understanding the cost of procedures. At the same time, healthcare providers need to remain competitive and reduce costs by leveraging technology throughout their organizations and with their patients. Healthcare systems need to implement a mobile-first approach not only because it's what their patients expect, but also to effectively manage care and track outcomes across devices and platforms. Many technology leaders are driving this approach by adding patient portals, mobile applications and relationship management solutions to their healthcare portfolios. Digital providers are more focused on developing a series of offerings that help create a holistic view of patient engagement and manage the full patient lifecycle across all interactions with healthcare systems.

As hospitals merge to form larger organizations and establish partnerships to share data, interoperability is even more critical for success. Healthcare providers must learn how to utilize their largest and most valuable asset – patient outcome data – which is also the foundation for predictive medicine. With the accumulation of outcomes-based data and device data, organizations are starting to collect significantly more information than they are able to use effectively. By investing in a comprehensive big data strategy, providers can harvest these new data sets, gain a better understanding of patient needs, and deliver more personalized, outcomes-based care.

Without effective data management systems and technology solutions, it will become challenging for providers to keep up with these new market trends. Over the next decade, healthcare providers that embrace this patient-centric approach to medicine will be the most successful and will also more positively impact the future of their patients' healthcare.