Digital Savvy Healthcare Consumerism

How Health Systems Can Leverage Digital Experiences to Meet the Needs of the Post-Pandemic Consumer

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Ardent SM HEALTH SERVICES

Beth Israel Lahey Health

Reed Smith
Vice President, Digital
& Innovation
Ardent Health Services

+

Chris Boyer
Vice President, Digital Strategy
& Market Intelligence
Beth Israel Lahey Health

+

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touch point media

touchpoint.health

How Have Healthcare Consumers Changed?

They still trust us

Clinicians and hospitals remain highly trusted despite notable erosion in confidence

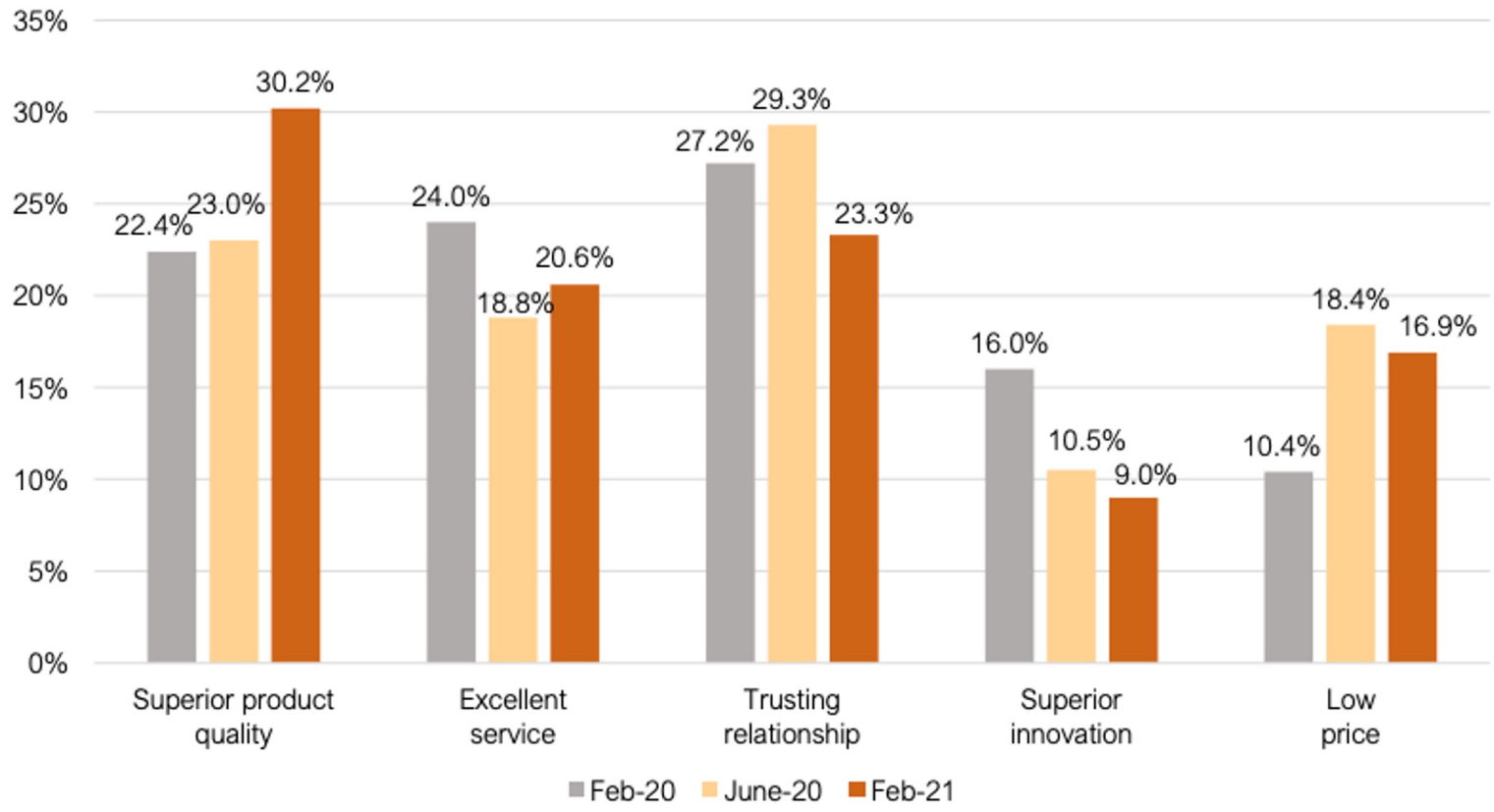
Since the coronavirus outbreak, has the level of trust you have in each of the following people and organizations to provide information on critical health issues increased or decreased?

	April 2020		August 2020		January 2021		December 2021	
	INCREASED	DECREASED	INCREASED	DECREASED	INCREASED	DECREASED	INCREASED	DECREASED
Nurses	73%	6%	60%	14%	60%	15%	62%	15%
Doctors	71%	7%	60%	13%	59%	14%	59%	18%
Hospitals	68%	11%	57%	17%	58%	18%	53%	24%

Dark Suits & White Coats: Healthcare's Acute Divide – Jarrard Inc.

Experience, quality and trust matter…

Rank your customers' top three priorities (1, 2, 3) over the next 12 months
(% reporting 1st priority)



Insights

Customers increasingly demand a superior product and excellent service across all industries. June 2020 highlighted trusting relationship as the most important priority. Moving forward and out of the pandemic, product quality emerges as most important.

The Transformation of Marketing: Emerging Trends,
The 2021 CMO Survey

…but access and self-service are more important.

The 2021 State of Digital Patient Access, Kyruus

Over 80% of healthcare consumers said that appointment availability was *very* or *extremely important* when selecting a new provider

60% said access to virtual care will impact their choice of where to obtain care in the future

Almost 60% of those who prefer online booking saying they'd switch providers to have this option

Our competition is also changing - and fast.

CVS announced in November plans to close 900 physical locations over the next three years and create three types of stores:

1. Primary care
2. HealthHUB sites
3. Traditional retail model

“When they’re done, I would expect it looks like a for-profit version of Kaiser Permanente,” said Todd Huseby, lead partner in consulting firm Kearney’s retail healthcare practice.

2022 forecast: Competition in retail healthcare will heat up, Fierce Healthcare

The Importance of Data

Developing a 360 view of our customers

Where customer experience is everything, the importance of gaining a complete unified view of the customer will:

- Allow us to know their wants and needs
- Predict potential demand and impacts to loyalty, retention and satisfaction
- Reduce costs by developing more targeted and personalized campaigns

What Is a 360 Degree View of the Customer and What Should You Do with It?, **ITChronicles.com**

Changing our perspective on attribution

As consumers (and the web) become more focused on privacy and managing their data, along with the impending elimination of third-party cookies, marketing is entering a new era - where data privacy and consumer choice are forcing us to measure differently.

Health systems should expand their data and analytics measurement by:

- Developing multi-channel in-house analytics dashboards
- Building an internal customer database (more than a marketing CRM!)
- Diversifying performance-marketing advertising (i.e. patient acquisition) and introduce brand and patient experience strategies

The Annihilation Of Marketing Attribution (And What Comes Next), Forbes

Considerations when designing a data/analytics strategy

Accountability
Interpretability
Transparency

Allows health systems to trust that our data systems are doing its designed-for task and identify quality issues. In addition, effort must be taken to detect bias or other issues.

What's ahead for AI and Machine Learning in healthcare?, **Security Boulevard**

Considerations when designing a data/analytics strategy

Accountability

Interpretability

Transparency

Ensures organizations can understand why a system makes a decision or draws an inference. Interpretability is essential to build trust, especially within complex care environments.

What's ahead for AI and Machine Learning in healthcare?, **Security Boulevard**

Considerations when designing a data/analytics strategy

Accountability

Interpretability

Transparency

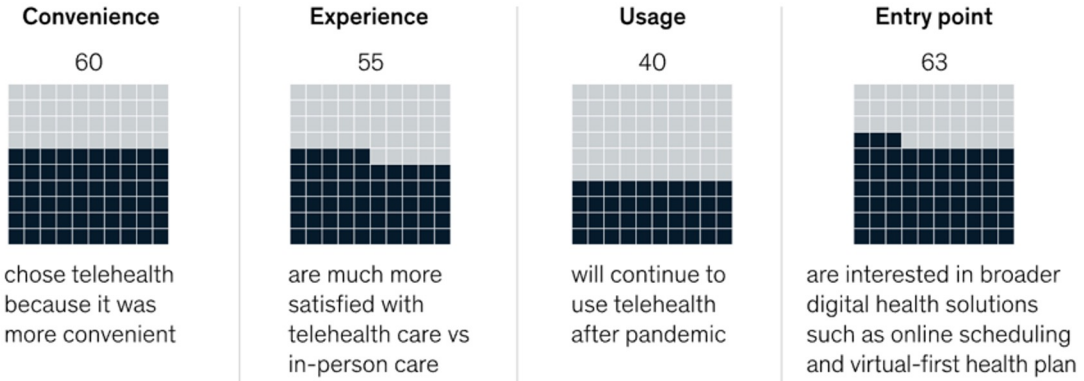
Allows us to know where data is being stored, how it is being used and if data can be combined with other data sets (for insight and alignment). Better transparency ensures that healthcare data are protected and used as intended.

What's ahead for AI and Machine Learning in healthcare?, **Security Boulevard**

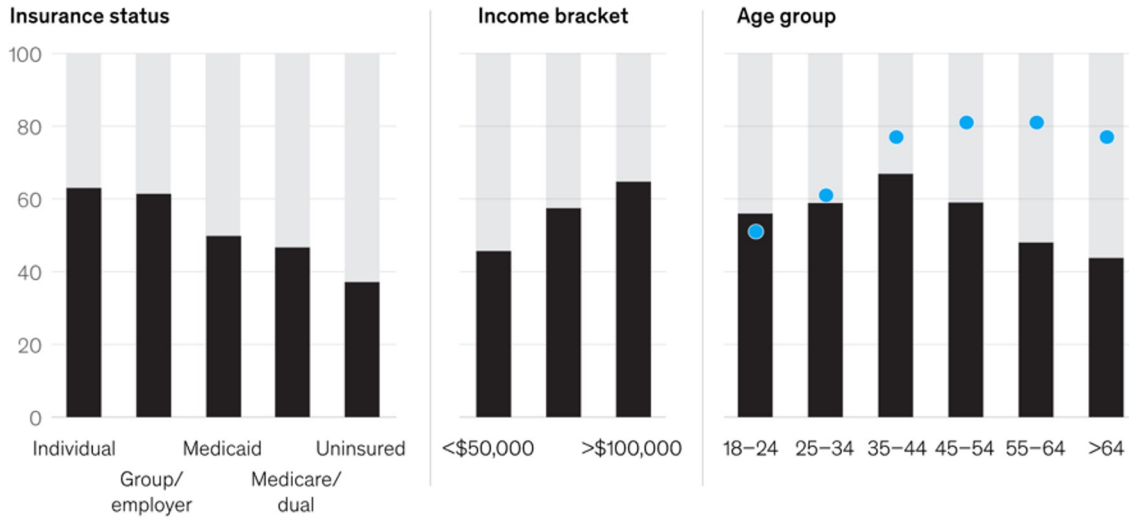
Leveraging Digital to Meet Customers’ Expectations

Patients are comfortable with using digital care

Beliefs about telehealth, % of respondents in agreement with statement



People who have used telehealth by demographic group,[1]
% of respondents



Patients love telehealth—physicians are not so sure,
McKinsey & Company

Foundational tenets of our digital strategy

Personalization

80% of customers would be more likely to use an organization if they offer personalized experiences.

Customer-service

US customers would pay 17% more to buy from a company that has a reputation for its great service.

Quick-resolution

18% expect a social media response within one hour; 53% expect responses to negative reviews within a week.

Customer expectations: 7 Types all exceptional researchers must understand, Qualtrics

Up-to-date

30% indicate that speaking with a knowledgeable & friendly agent is the most important factor or their experience

Omni-channel

9 in 10 consumers want a seamless omnichannel experience using channels they're most comfortable with.

Easy-to-use

40% dealt with complicated interactions, such as payment disputes, by talking to someone over the phone.

Self-service

70% expect a website to include a self-service application; 73% want to solve their own problems on their own.

Laying the Foundation

The Digital Hospital of the Future, Deloitte

1. **Create a culture for digital transformation -** understand the importance of a digital future and drives support for its implementation at all organizational levels.
2. **Consider technology that communicates -** Connecting disparate applications, devices, and technologies—all highly interdependent—and making certain they talk to each other.
3. **Play the long game -** Since digital technologies are ever evolving, flexibility and scalability during implementation is critical.
4. **Focus on data -** While the requirements of data interoperability, scalability, productivity, and flexibility are important, they should be built upon a solid foundation of capturing, storing, securing, and analyzing data.
5. **Prepare for Talent 2.0 -** As hospitals invest in exponential technologies, they should provide employees ample opportunities to develop corresponding digital strategies.

Questions & Conversation

Chris Boyer

chris.boyer@bilh.org

@chrisboyer

Reed Smith

reed.smith@ardenthealth.com

@reedsmith

http://touchpoint.health