

FEATURED SPEAKER



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Solutions Expert



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The Hybrid Theory
The Thoughtful Convergence of Physical and Digital Experiences in Healthcare

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August 4–6, 2021

The Hybrid Theory in Healthcare

- The Journey from Patient to Consumer
- Dueling Storms: COVID-19 + Consumerism
- The Three Components of the Hybrid Theory
- Building a Hybrid Experience in Healthcare

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The Journey from Patient to Consumer

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The Genesis of Patient-Centered Care



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Eight Dimensions of Patient-Centered Care

Eight Dimensions of Patient-Centered Care
Respect for patients' values, preferences and expressed needs
Coordination and integration of care
Information, communication, and education
Physical comfort
Emotional support and alleviation of fear and anxiety
Involvement of family and friends
Continuity and transition
Access to care

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A Quarter Century of Patient-Centered Care

- The Eight Dimensions were increasingly adopted by hospitals and doctors – treat the disease *and* the person
- The CAHPS movement of public report was created to motivate internally and inform externally
- Consumers haven't exactly been captivated by CAHPS
- Industry measurement has grown stale and cynical

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What Makes the Healthcare Consumer Tick?

- Consumers have **concern** about shouldering the growing burden of paying more for their healthcare
- As true in any other industry: the more you pay... the higher your **expectation** for greatness
- As a result, consumer expectations for healthcare have grown while **frustration** in the experience rises

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Non-Healthcare Case Example: Getting Food with a Car Full of Kids

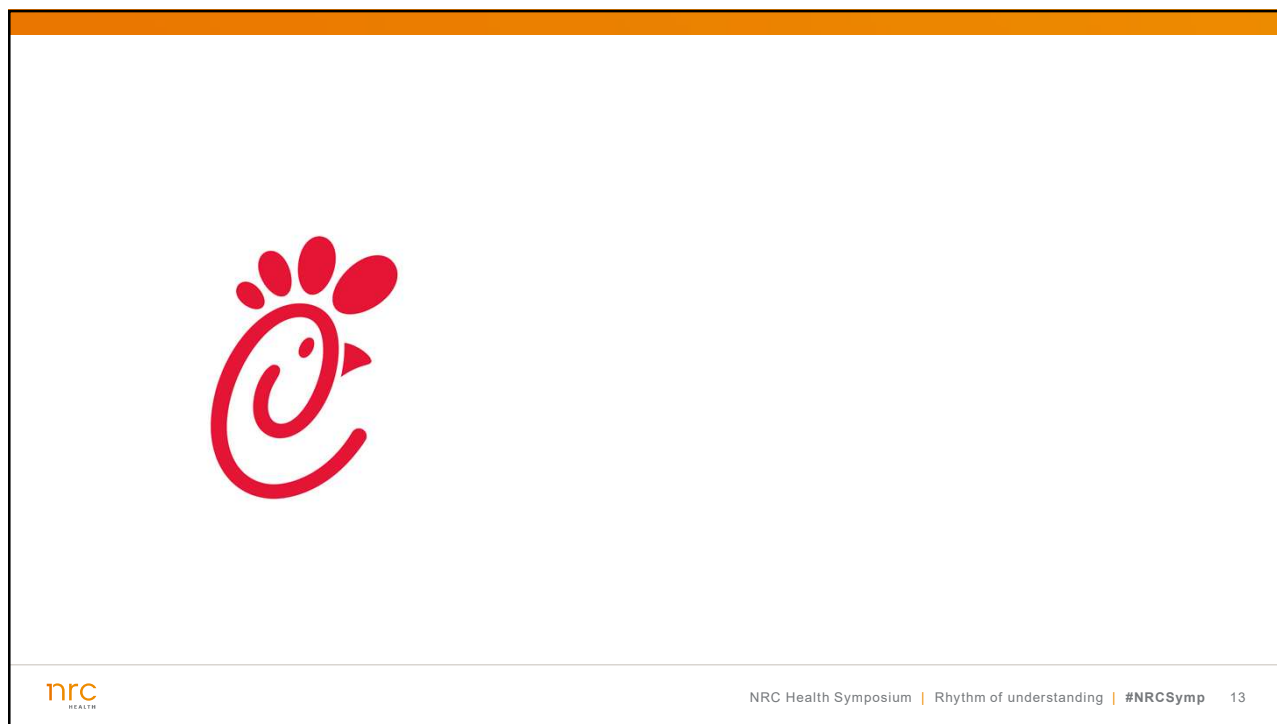


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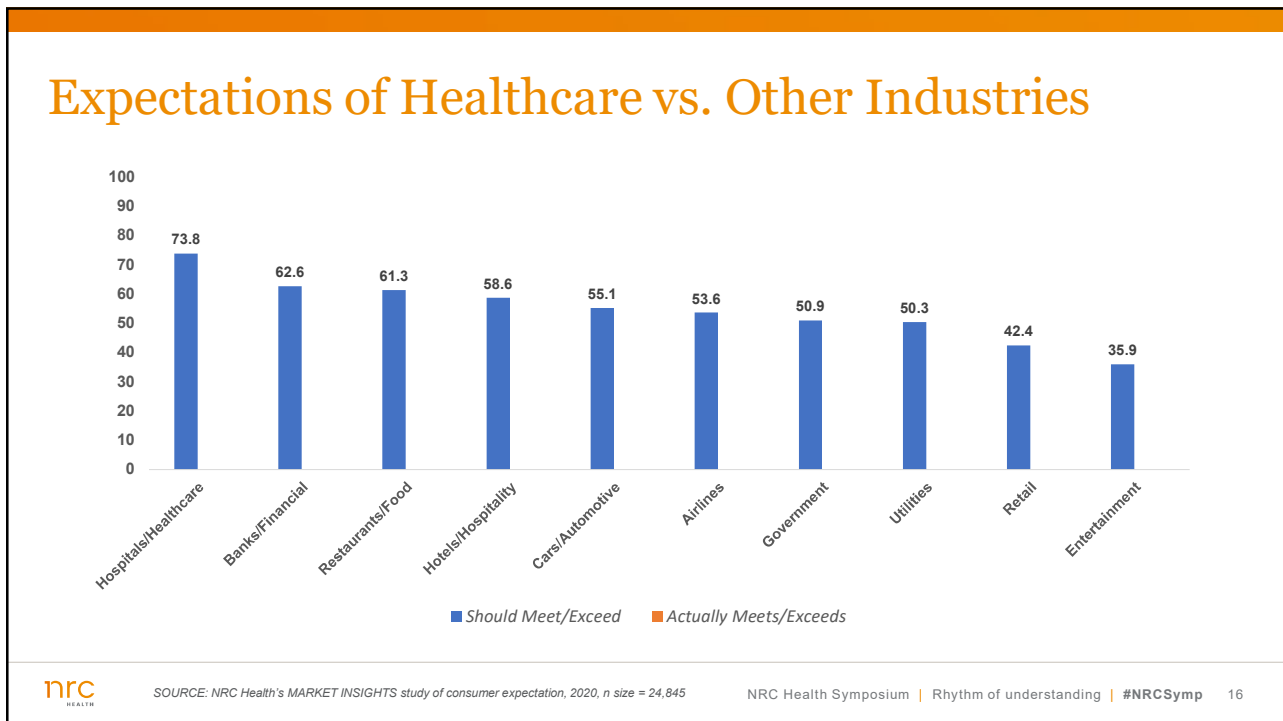
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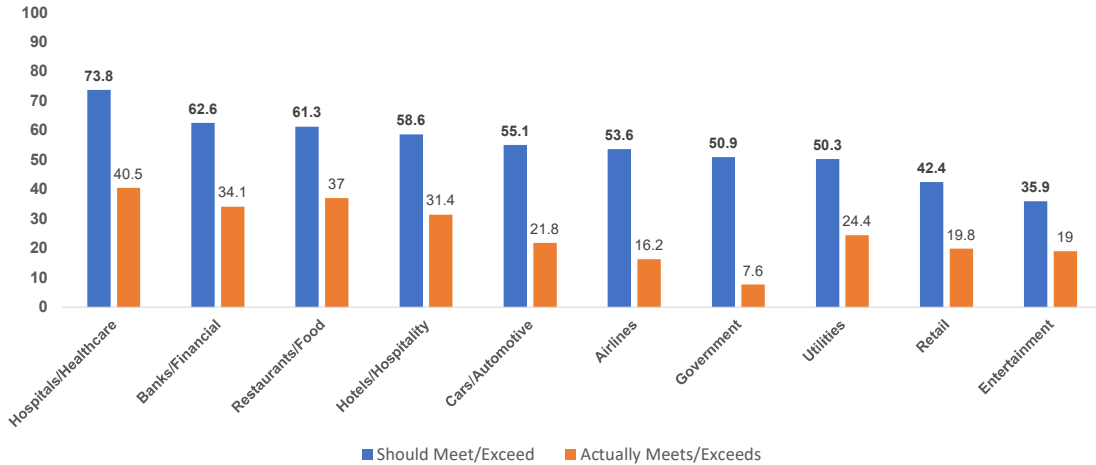


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Comparison of 'Should Meet' vs. 'Actually Meets'

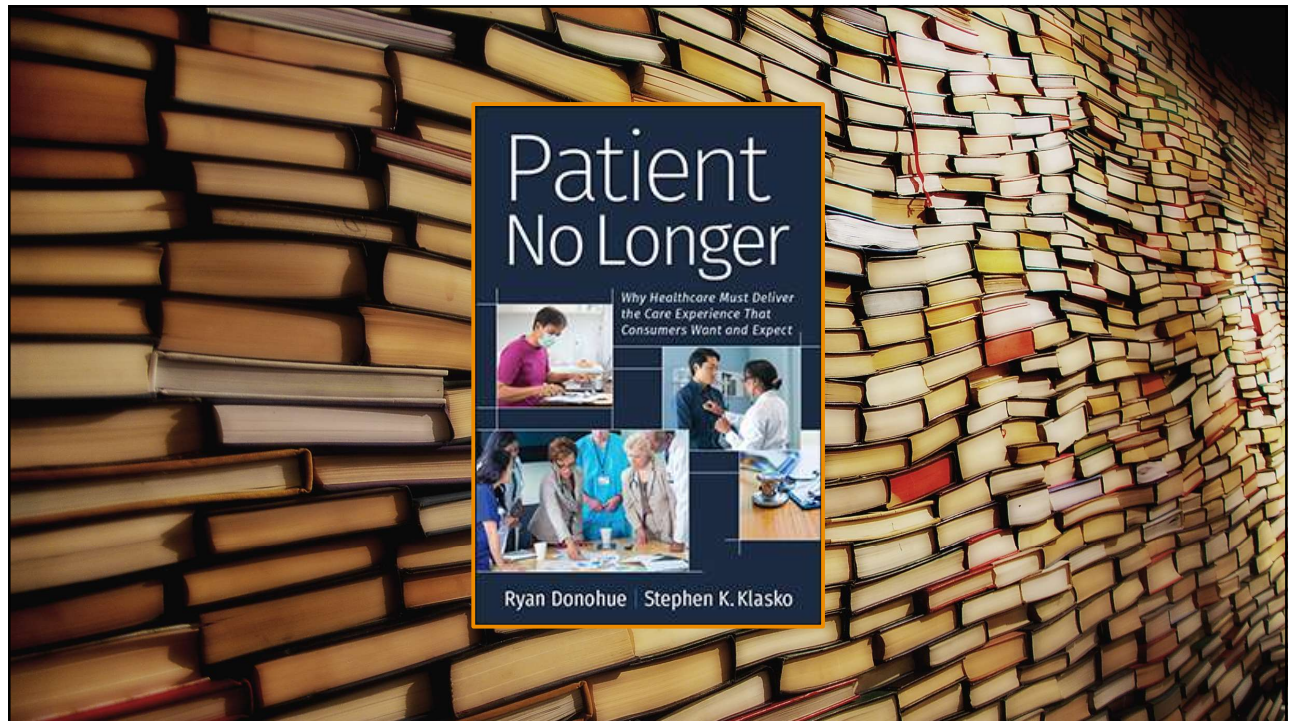


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SOURCE: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845

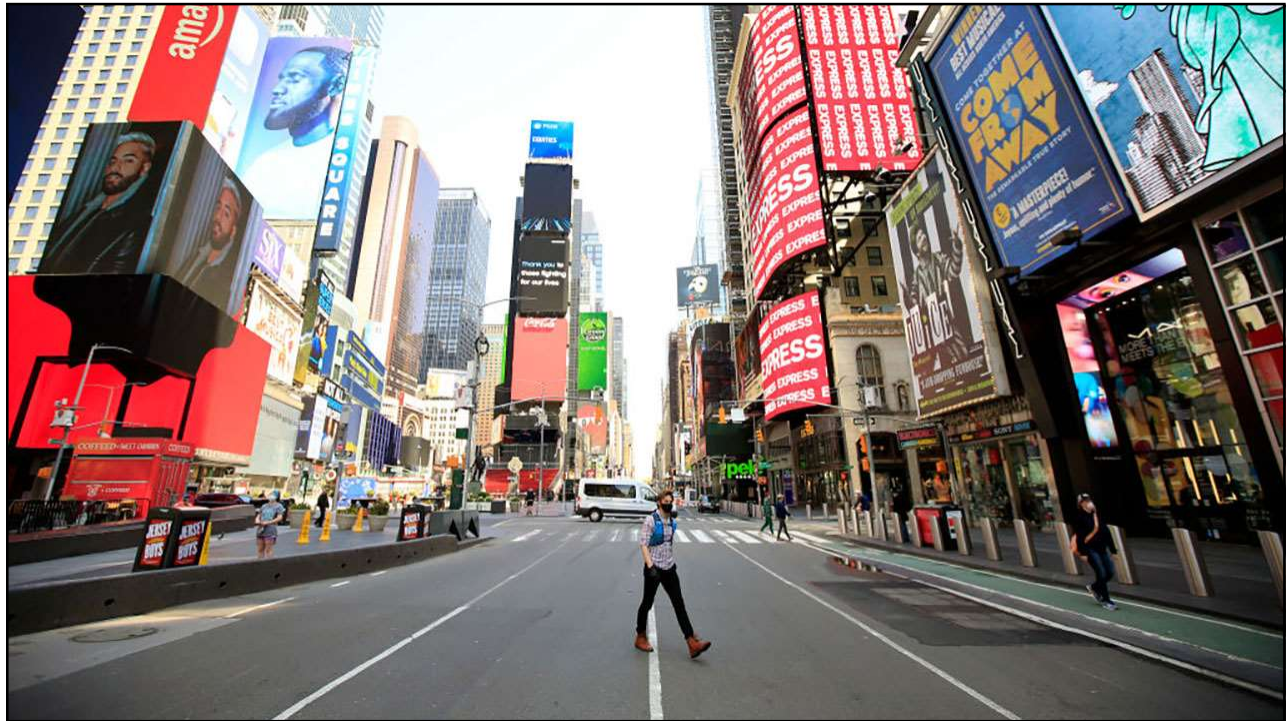
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Dueling Storms: COVID + Consumerism

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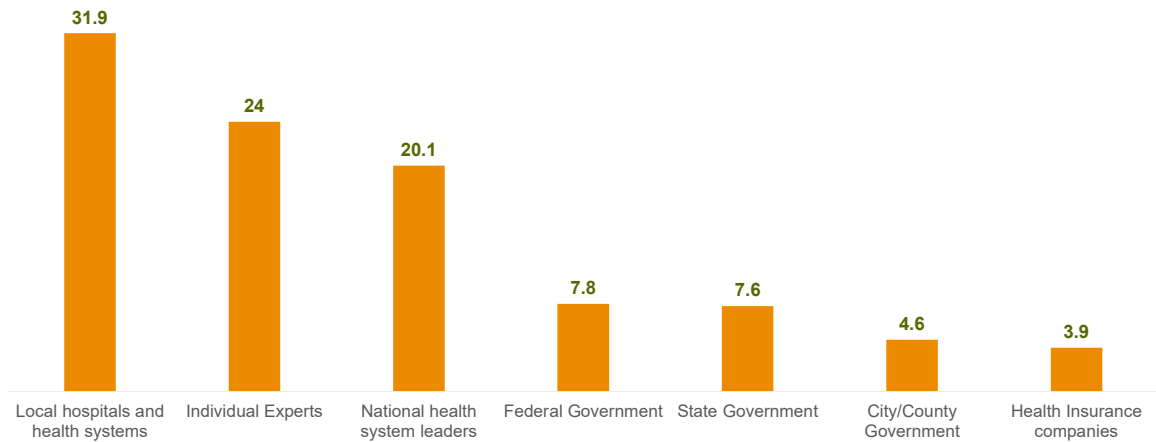
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NRC Health's study of COVID-19 effects on consumers

- 3 in 10 consumers delayed care last year
 - Dental, primary and specialty care most likely to be delayed
- 7 in 10 deferrers cited COVID-19 in delaying their treatment
 - Majority of the rest cite various financial concerns
- 1 in 3 consumers utilized virtual care/telehealth last year
- Of virtual patients: *more satisfied* than with physical visits

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Who do you trust the most to handle COVID-19?



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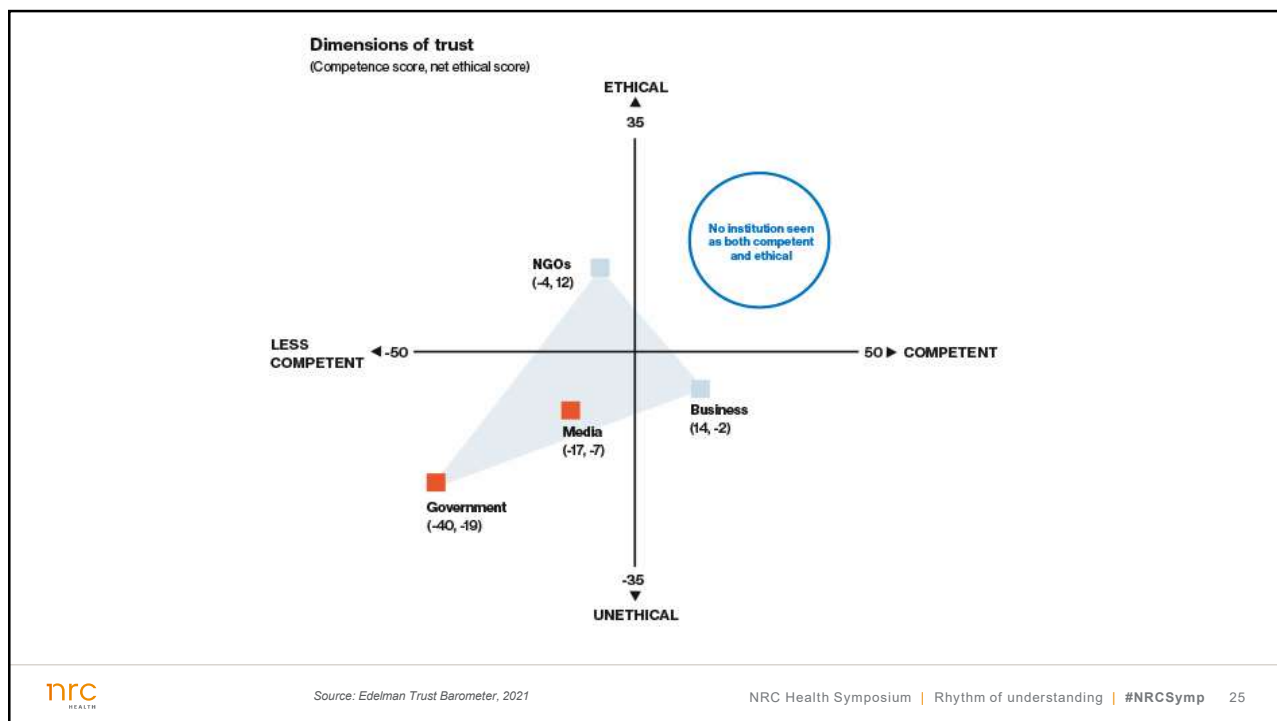
SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, 2020-2021, n size = 70,459

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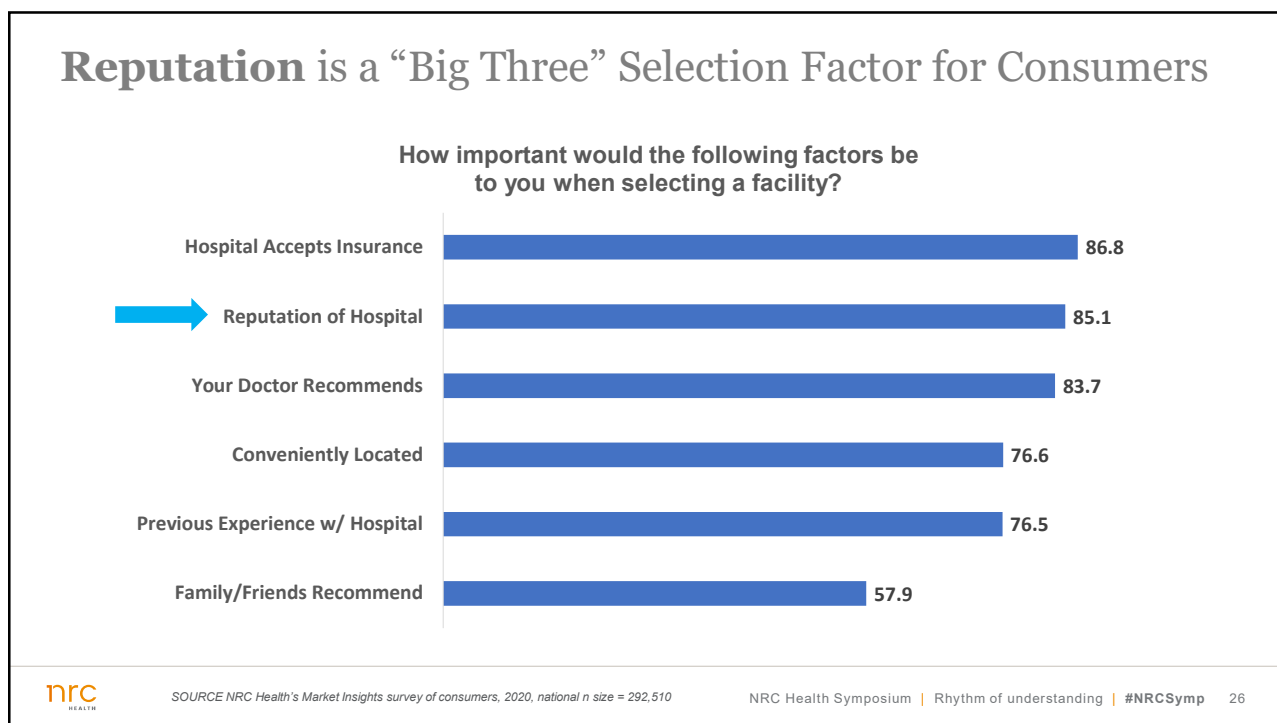
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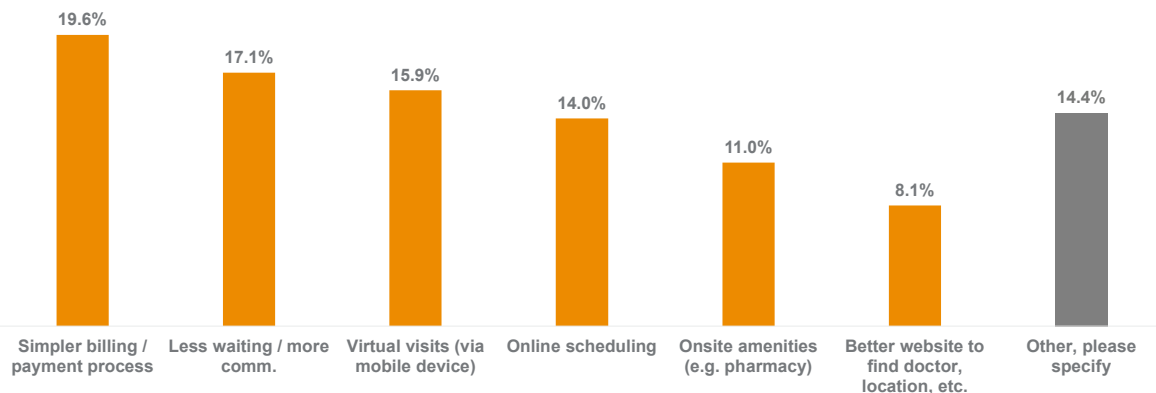
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The Three Components of the Hybrid Theory

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Consumer Wish List for Healthcare (from 2018)

Which improvement should your provider pursue?



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What Do Consumers Want From Us?

Three components emerge from asking consumers directly

Access

Start me on a quick, easy path to access the right care at the right time

Engagement

Deliver easy, frictionless experiences that meet my expectations

Value

Don't kill me with the bill – give me context, provide options and be transparent

Access: Telehealth aka “Return of the House Call”

When it comes to service – especially this year - consumers are now expecting *you* to come to *them*

- **35 percent** used telehealth services in 2020 (15 percent in 2019)
- **74 percent** were satisfied with visit
- **57 percent** are likely to schedule telemedicine in the future
 - 54 percent would see PA/NP
- **8 in 10** employers are now covering telehealth as a benefit



Engagement: “Systemness” Rules Supreme

Consumers have grown tired of confusing, disjointed experiences in their journey

Consumer's value unified brands & “systemness”:

- **65 percent** said they were more likely to choose a hospital that is part of a system
- **31 percent** said it makes no difference
- **4 percent** said they were less likely to choose a hospital that is part of a system
- **18 percent** feel its 'extremely important' for their physician to be affiliated with system



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Value: The After Experience of Paying for Care

- Half of consumers feel a *significant* burden paying for care
- 87% of consumers incur some level of difficulty in trying to understand their healthcare bill(s)
- 65% feel its important to be able to fully understand their bill
- 51% feel its important to receive a single bill
- Many dissatisfied patients describe paying for their care as one of the worst parts of the experience



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What Do Consumers Want From Us?

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Digital Health is a Cross-Generational Force

- For consumers, screens are the new door
- In healthcare, consumers are seeing the growing possibilities of online information, education & **experiences**
- Older consumers are more active in digital health:
 - Ave. age of healthcare decision-maker is 48 years young
 - Same age as consumers who use social media for healthcare purposes (49 years young)
 - Roughly half of 65+ are aware of doctor ratings
- Across all age groups, digital info is flourishing



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Hybrid Experience: Case Examples

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ACCESELITE

CLASSES & EVENTS AE ANYWHERE BLOGS AND PRESS SIGN UP CONTACT

MEMBER LOGIN

ACCESELITE ANYWHERE

Healthy Employees, Healthy Businesses

The first total well-being platform delivering comprehensive physical, mental and emotional support, wherever your team might be.

CORPORATE INQUIRY

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VIRTUAL WAITING ROOM SOLUTIONS ABOUT RESOURCES 800-933-1620

VIRTUAL WAITING ROOM

Ensure Social Distancing Amid COVID-19

The idea of waiting in a waiting room can be scary. Give patients the peace of mind they're looking for with a virtual waiting room. Our proven solution provides contactless check-in from your parking lot and can be up and running in 24 hours.

FREE PHONE CONSULTATION

One Platform, Multiple Touchpoints
Our solution brings positive, digital experiences to multiple touchpoints in the patient journey.

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Turquoise Health

Patients Providers Payers Employers Revenue Cycle Enterprise Platform

Compare prices before you get care.

Starting this year, all hospitals are required to list their prices for elective services. Whether you have insurance or plan to pay cash - find and compare prices below.

Q Enter service name or code... 67025 Search

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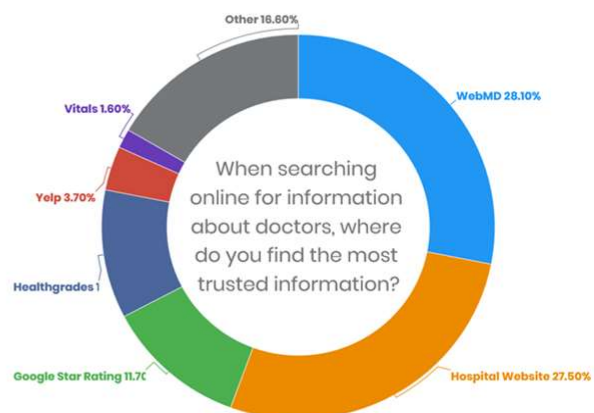
Digital Health as a Relationship Builder

- Consumers want care providers to take a step toward them
- Digital health presents the best opportunity to close the 'cognitive gap' consumers experience with healthcare
- Consumers who visited a provider website, social media page or experienced virtual care now view those on-par with traditional physical healthcare experiences



Revelation: Consumers Trust Hospital Websites

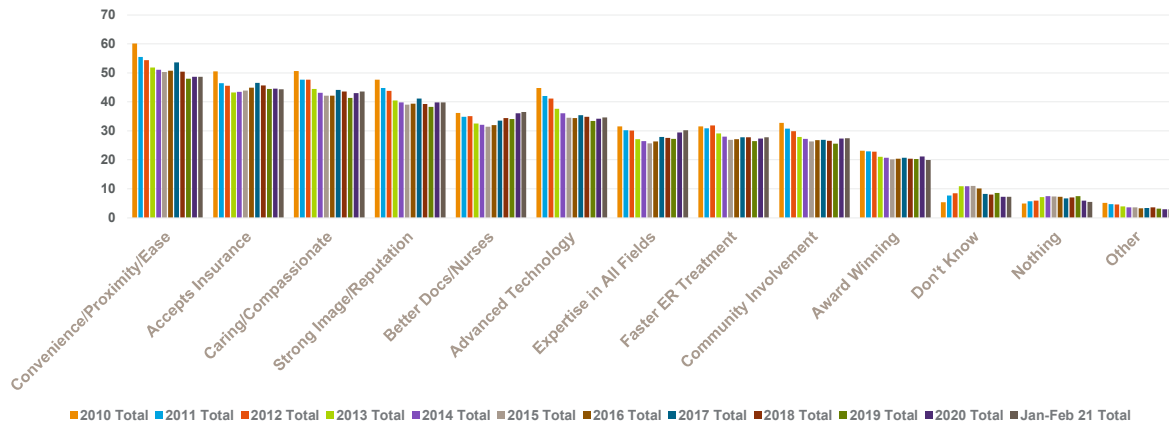
27.5% of Consumers say a **Hospital's Website** is the **Most Trusted** Online Source for Doctor Information



N = 46,962 | 2019 | NRC Health Market Insights National Study

Future Metric to Watch: Differentiation

What factors stand out in your mind as things that (Top-of-Mind Hospital) does especially well that set(s) it apart from other providers in the area?



nrc SOURCE NRC Health's Market Insights, 2010-2021, national n size = 284,111 (average); 43,023 (2021 only) NRC Health Symposium | Rhythm of understanding | #NRCSymp 41

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Hybrid Theory Playbook

- **Easy win:** finish a pre-COVID, consumer-facing initiative... asap
- **Access Play:** buy/build a product that allows either easier telemedicine, online scheduling, or virtual waiting room ability
- **Engagement Play:** conduct a total brand audit – including virtual – and ensure there is consistency across all assets (no kitchen sink)
- **Value Play:** post physician ratings/reviews on YOUR website
- **Future Strategy:** integrate digital INTO the strategic plan

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I'm re-visiting what's important.

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I'm re-visiting what's important.

I want healthcare to be different this time.

I'm re-visiting what's important.

I want healthcare to be different this time.

So, what do you have to offer?

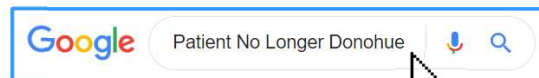
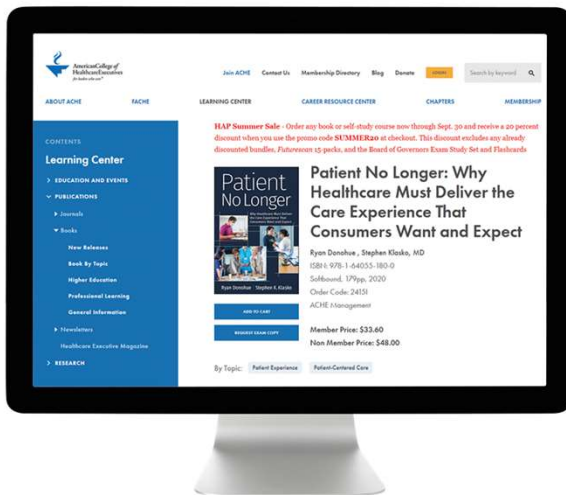
It's all about the Customer Experience

“We think of the Experience as our relationship with you from the time you visit our website or call us to when you arrive at your destination and all points in between”



Gary Kelly
CEO-Southwest Airlines

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Questions?

