

Identity Crisis

Establishing Our Post-COVID Brand (Before Someone Else Does It For Us)

Ryan D. Donohue

Strategic Advisor

NRC Health & The Governance Institute

Prepared for

Leadership Conference | March 1, 2023

Roadmap

- Healthcare's Chronic Chaos
- Consumerism's Big Comeback
- Exploring Our Organizational Identity
- Forging a Future Identity

Healthcare's Chronic Chaos



Source Tatiana O'Toole, dribbble.com

From *Patient No Longer* Podcast: “Where Do We Go From Here?”

“We’ve been through three years of a pandemic, and it has been a multi-act drama. We managed through uncertainty with several COVID surges, but the wheels really came off when Omicron hit. The aftershocks are still coming, with a devastating impact on staffing, cost inflation, resource consumption and financial performance for healthcare providers. And it’s had an adverse impact on customer service. Despite the headwinds, healthcare providers must double down on supporting caregivers and caring for every patient/member as a unique person if we are going to differentiate our brand promise to those we serve.”

— **Mike Slubowski**, CEO of Trinity Health



Healthcare's Chronic Chaos

- COVID has long faded as a common enemy
- Financial challenges and workforce woes abound
- Patient deferment of care remains stubbornly high (27%)
- 'No Preference' for any brand remains high among patients
 - 32% have no stated preference; includes recent patients
- Telemedicine/Virtual care has predictably plateaued

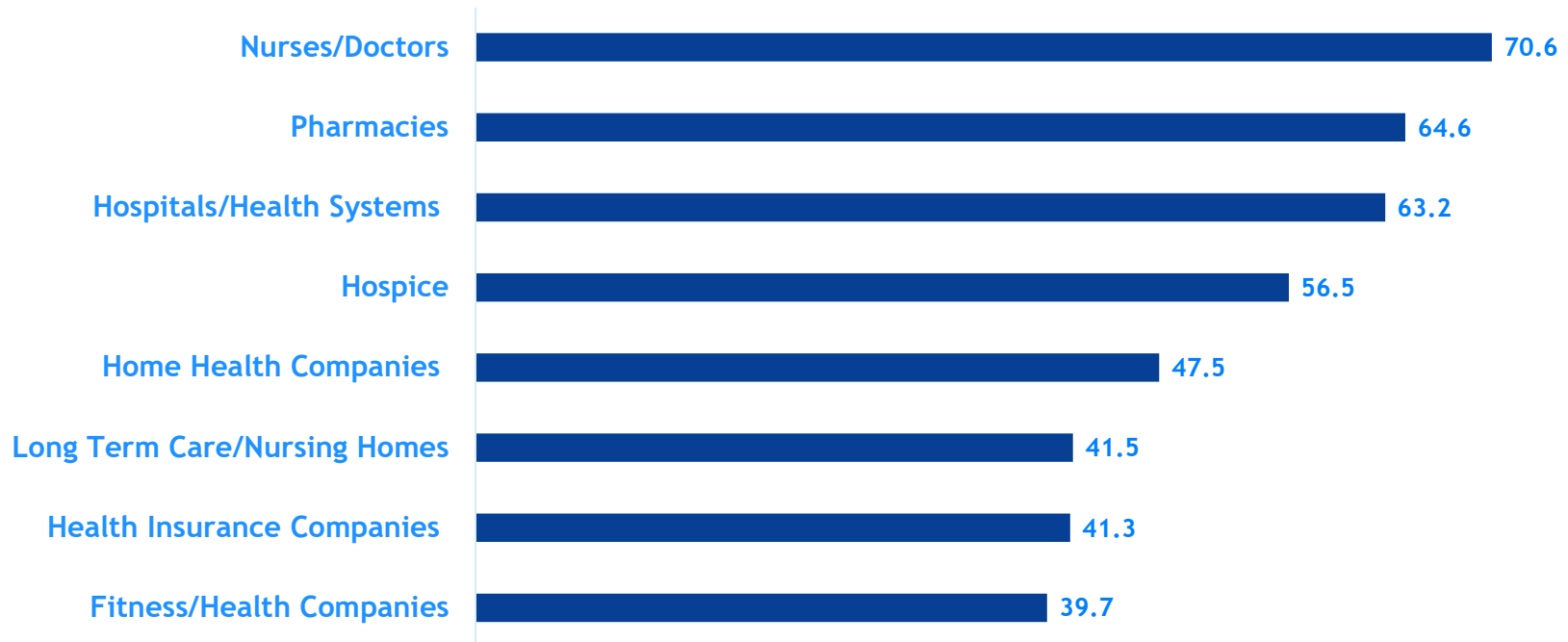
Consumerism's Big Comeback

How Do Consumers Perceive Us Right Now?

- ‘Healthcare Heroes’ long gone? Not necessarily...
 - Only 1 in 10 consumers say their outlook on healthcare providers has worsened since COVID
 - 27% say their outlook has improved (63% say it’s the same)
- Consumer perceptions of ‘Quality’ tell a similar story
 - Only 12% of consumers say the quality provided by their local healthcare providers has worsened
 - 18% say quality of care has improved (70% say it’s the same)

Who Do Consumers Trust in Healthcare Right Now?

How would you rate your overall trust and confidence in the following?
(asked individually)

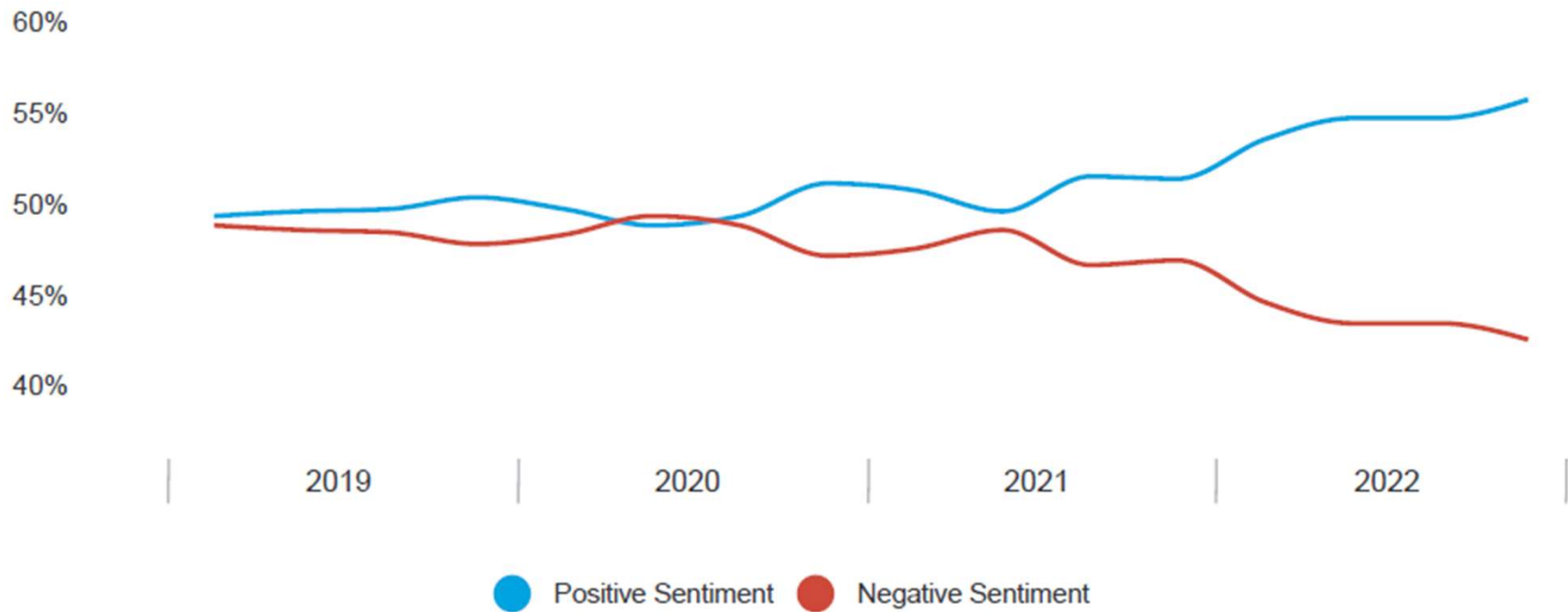


SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2022-2023, n size = 75,364

Are Post-COVID Consumers Feeling Adventurous?

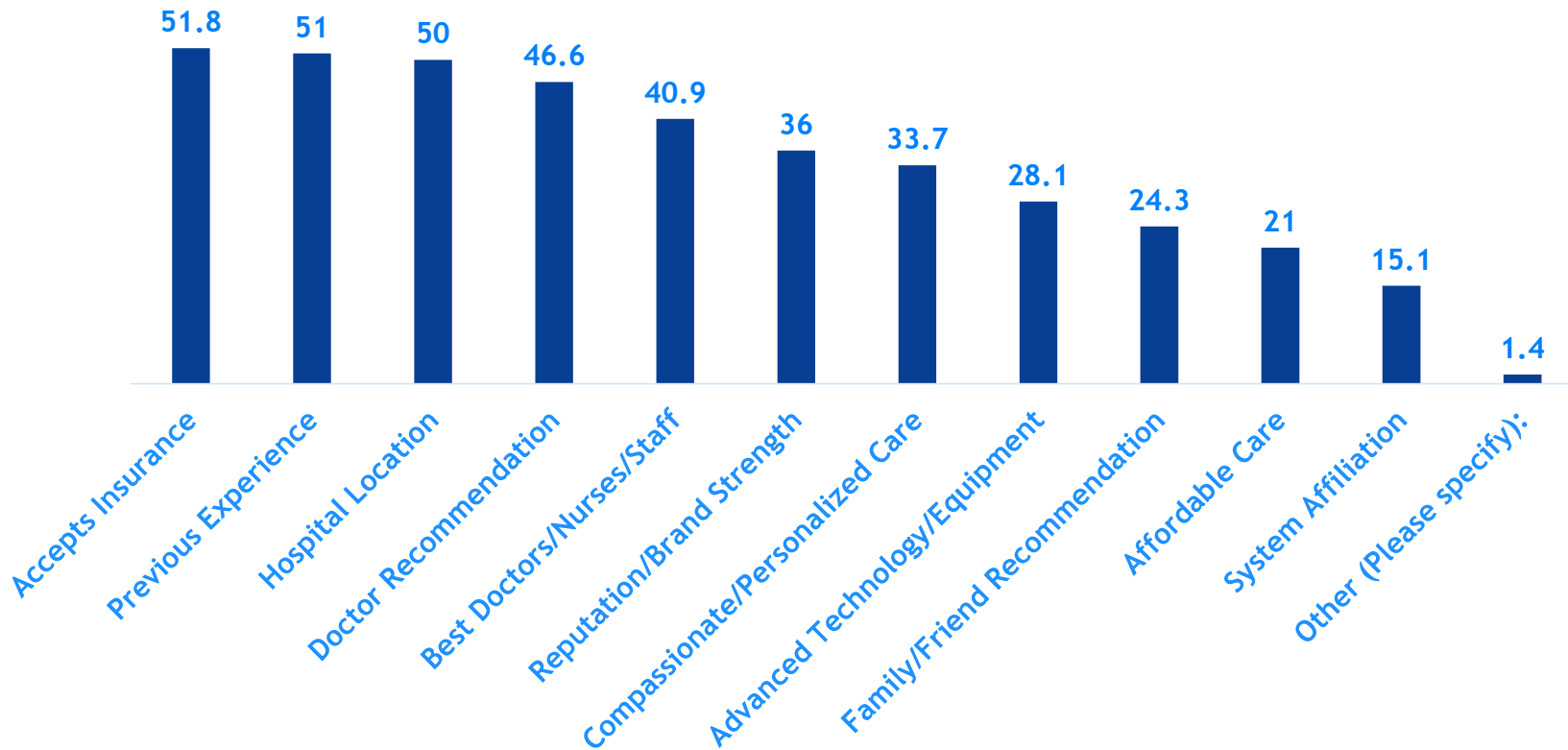
- Consumers not overly willing to switch (post-COVID)
 - 13% more likely to try a new healthcare provider
 - 17% less likely to try a new place (7 in 10 neither likely nor unlikely)
- Openness to visit a pharmacy or retail clinic for future care
 - 48% would visit a pharmacy like CVS or Walgreens for care
 - This care would include seeing a doctor and/or getting tests done
 - 28% would not consider this; 24% aren't sure if they would

Consumer Sentiment Toward Care in Retail Settings



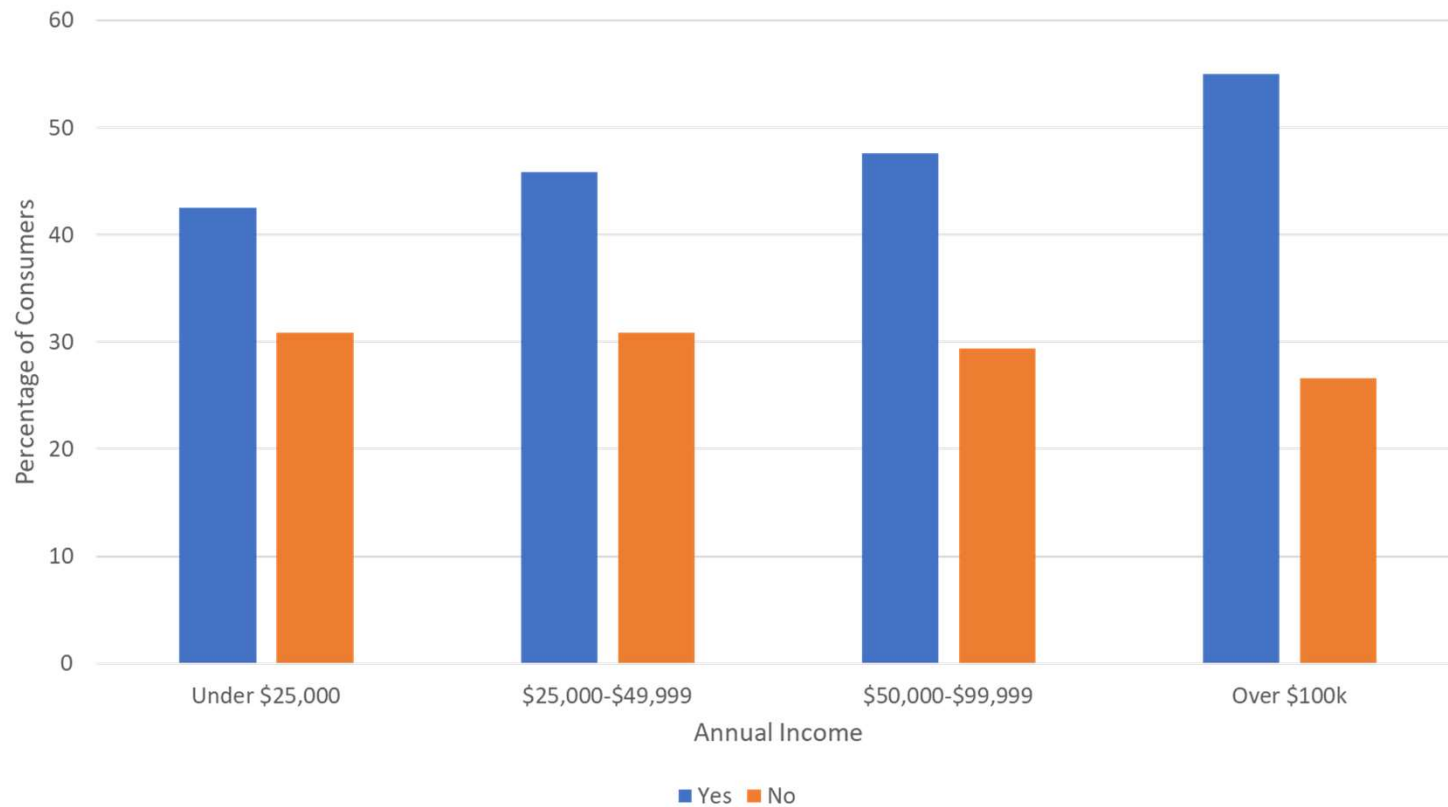
SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2019-2022

What Drives Loyalty Across the Country



Source NRC Health's Market Insights 2021 / 2022

Would you visit a pharmacy or retail clinic (CVS, Walgreens, etc.) for your future needs, including seeing a doctor or getting tests done?



SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2022-2023, n size = 75,364

Consumerism's Big Comeback

- Consumer Switching isn't all that prevalent
 - Which means acquiring new patients isn't as easy as it used to be
- We will continue to compete with new entrants
 - They enjoy growing positive sentiment
 - Many new entrants boast recognizable brands
- Patients we are most likely to lose: commercially insured
 - Higher likelihood to use pharmacy among \$100k+ households (55%)

Exploring Our Organizational Identity

Identity Status Model developed by James Marcia

Identity Foreclosure

Status is created or inherited without exploring alternatives; often based on pressure or need

Identity Diffusion

May be experiencing a crisis, in isolation, suffering from existential dread, lacking exploration

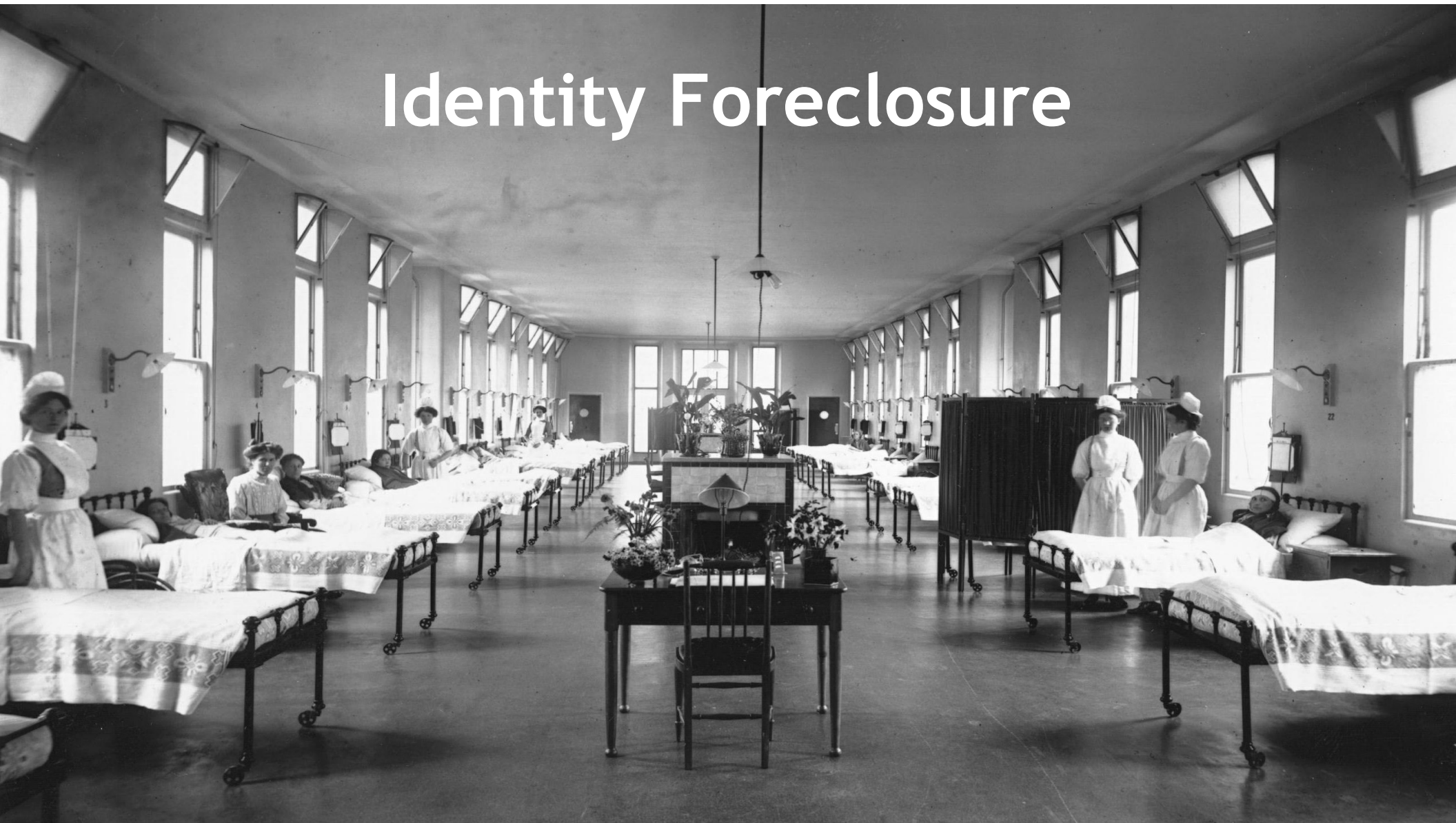
Identity Moratorium

Actively exploring alternative identities, in crisis but open-minded, order is sought over chaos

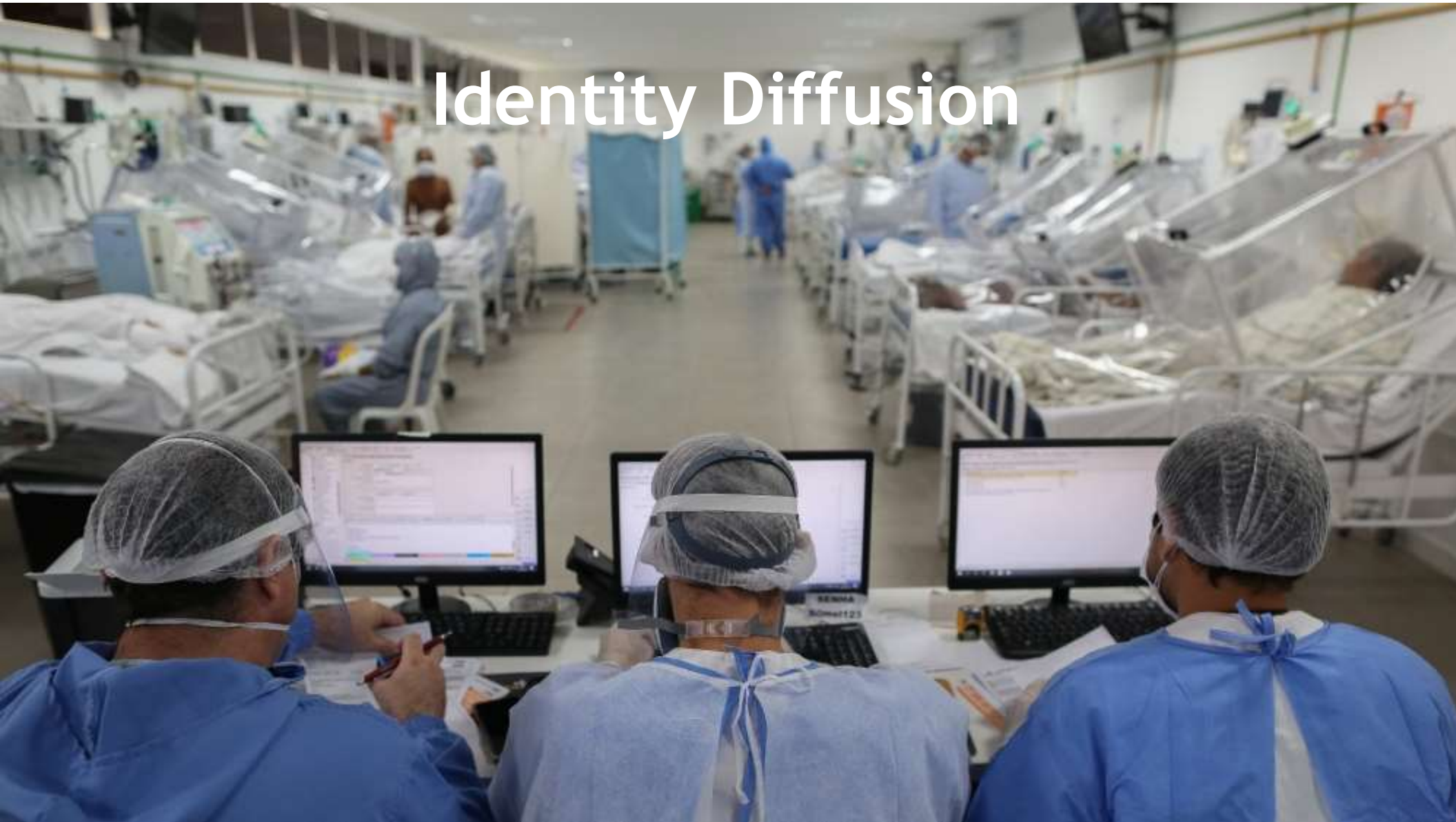
Identity Achievement

Crisis has been worked through, identity explored, new commitments forged, new identity achieved (locus of identity is often more internal than external)

Identity Foreclosure



Identity Diffusion



Identity Moratorium



Identity Achievement



Identity Status Model developed by James Marcia

**Identity
Foreclosure**

Status is created or inherited without exploring alternatives; often based on pressure or need

**Identity
Diffusion**

May be experiencing a crisis, in isolation, suffering from existential dread, lacking exploration

**Identity
Moratorium**

Actively exploring alternative identities, in crisis but open-minded, order is sought over chaos

**Identity
Achievement**

Crisis has been worked through, identity explored, new commitments forged, new identity achieved (locus of identity is often more internal than external)

— Stay Safe &

BE INFORMED ABOUT COVID-19

Stay Aware of the Coronavirus, Stay Home & Safe For You and Others, And Maintain All the Safety Measures by Medical Professionals to Defeat It!

 [LEARN MORE](#)

 [WATCH VIDEO](#)



Your New Brand: “COVID-19 Health System™”

- Consumers were saturated with COVID messaging
 - 41 percent reported ‘hearing the same message’ from all healthcare stakeholders in their local area
 - 20 percent reported messaging differences
- Our powerful show of unity has left behind a brand blur
- Health systems are struggling to send new messages
- Without COVID to define us, who are we?

Outside Healthcare





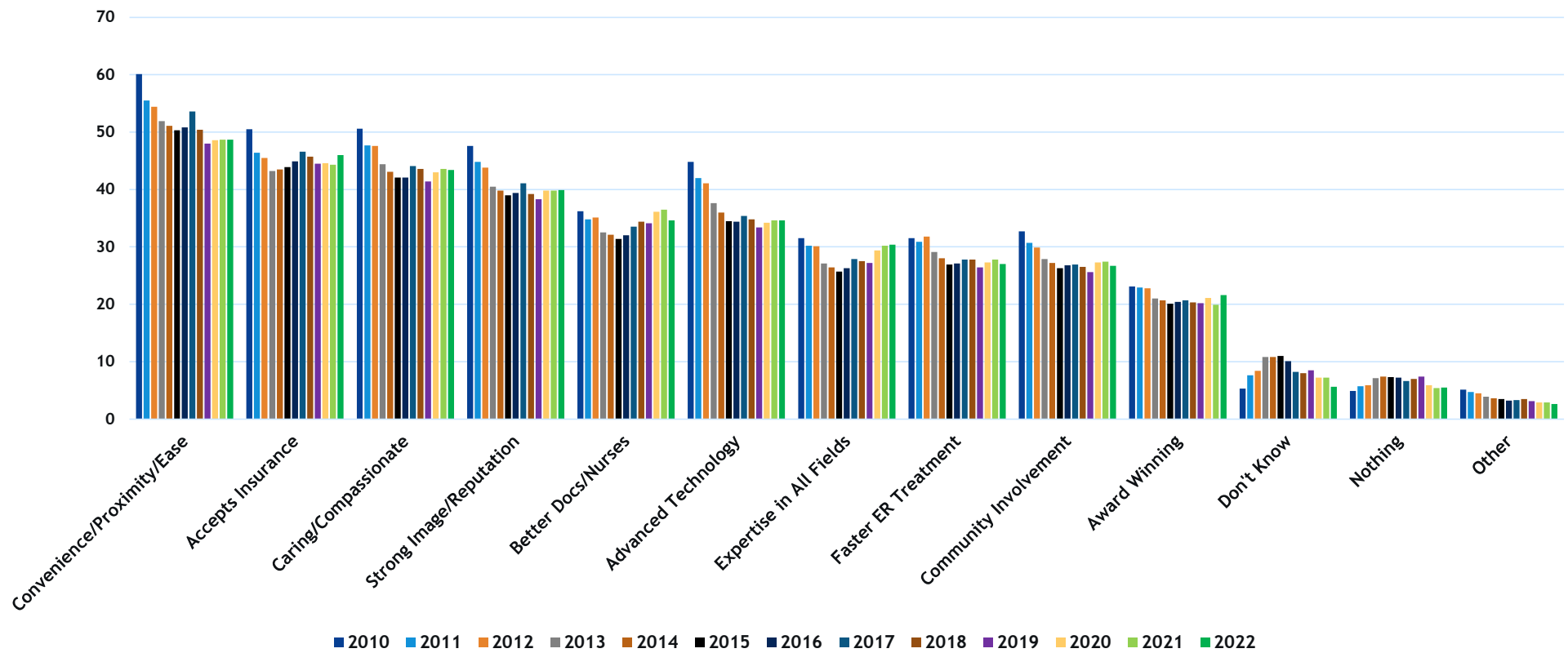
Forging a Future Identity



5.1%

increase in marketing recall
from the lowest point of
59.4% in 2020

National Comparison of Brand Differentiators



Source NRC Health's Market Insights, national market trend, 2010-2022, n = 284,111 (annual average)

What All Constitutes Our Brand?

BUSINESS AND COMMUNICATION TOOLS

Advertising
Public Relations
Collateral
Direct mail
Publications
Forms
Patient bills

DIGITAL CHANNELS

Content Marketing
Social media
Websites
Mobile app
Wearables



EMPLOYEE AND PHYSICIAN INTERACTION

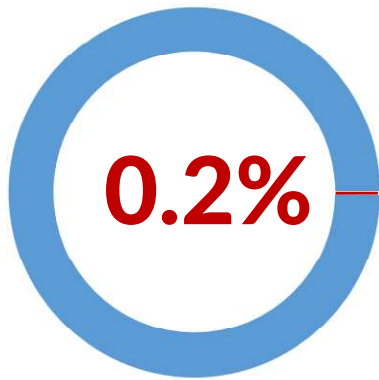
Staff attitude
Staff knowledge
Staff presentation
Service response & follow-up

FACILITY

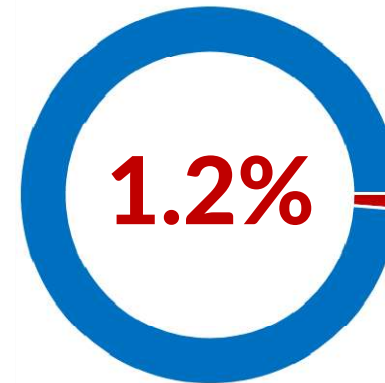
Parking
Presentation & appearance
Way-finding
Cleanliness
Care environment



We Don't Have Much Traditional Time in Front of Patients



99.8% of life happens beyond the outpatient setting*



98.8% of life happens beyond the inpatient setting**

*16 waking hours/day x 365 days/year vs one 15-minute visit every week of the year

**365 days/year vs one hospital stay in a year at the national average LOS of 4.5 days



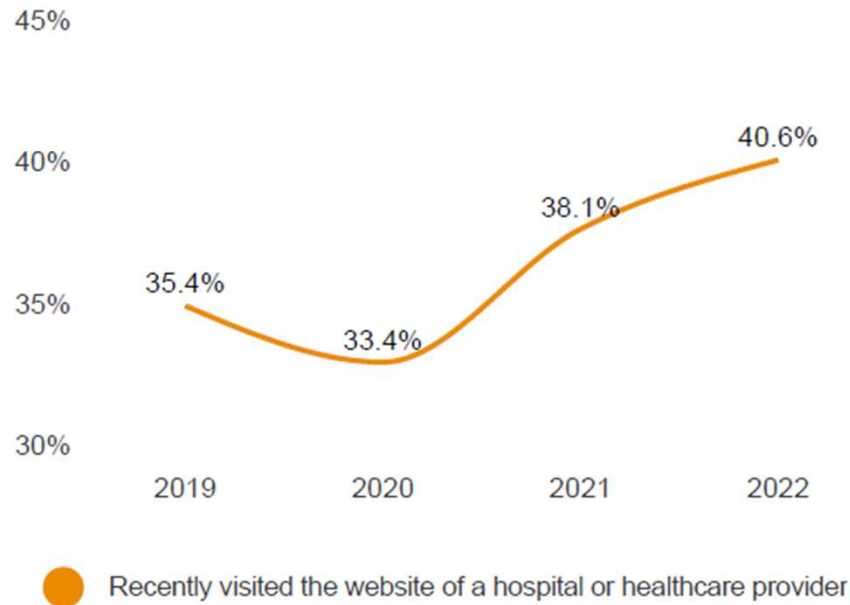
Healthcare Journey: What's the First Step?

Which of the following do you consider the start of your healthcare journey?



SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2022-2023, n size = 75,364

Digital Front Door is the Ticket to the Game for Consumers

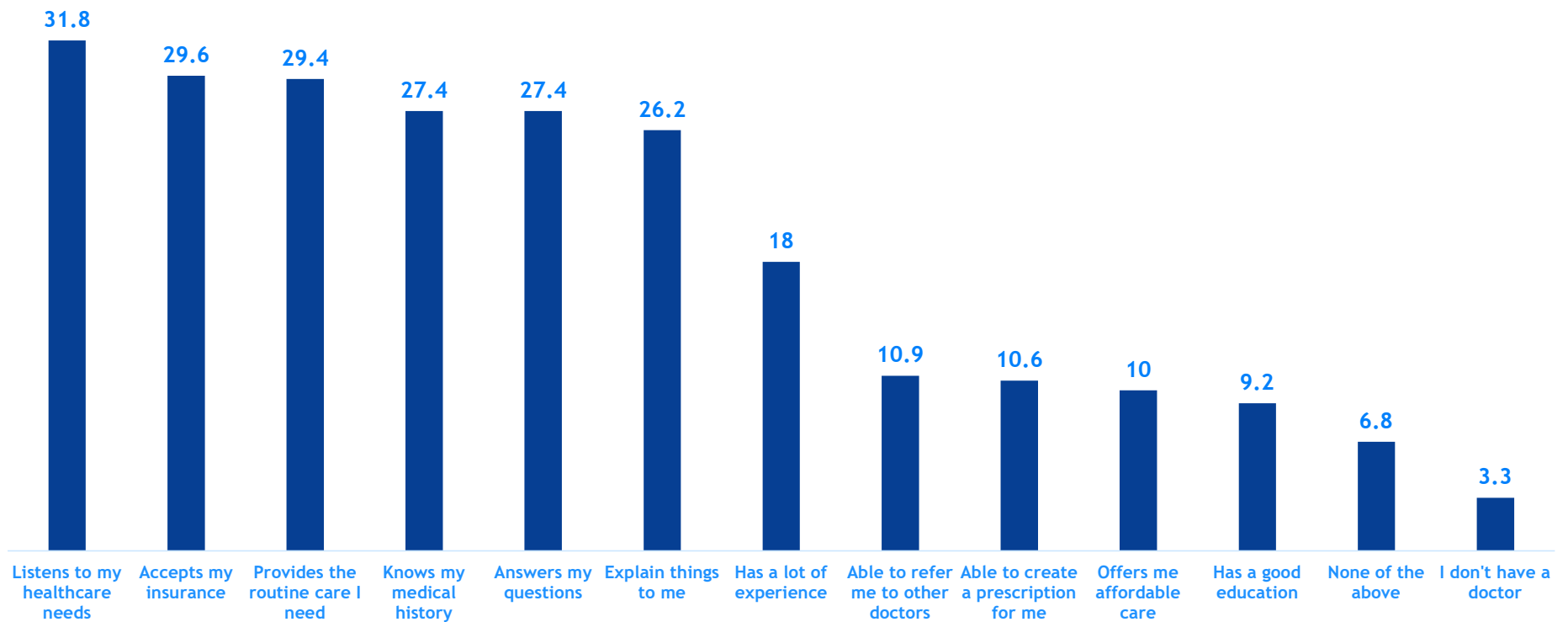


When visiting the website of a hospital or health care provider, what information is most important to you?

- 29.5%** How to find a physician
- 24.8%** Patient ratings/reviews of doctors
- 24.0%** Hospital specialty/service lines
- 22.7%** How to find the hospital
- 21.7%** Doctor bios

Why Do You See Your Doctor? What Makes Them Valuable?

When you think about the value of having a doctor, what are the most important reasons why you see your doctor?



SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2022-2023, n size = 75,364

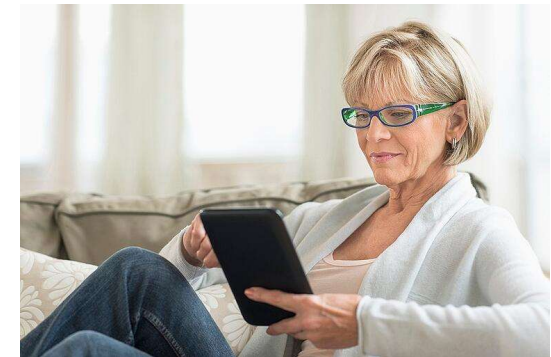
HEALTH

Companies Bet You're Ready to Test at Home for More Than Covid-19

Developers pursue rapid flu and strep-throat diagnostic products, as pandemic raises consumers' comfort level with monitoring own health



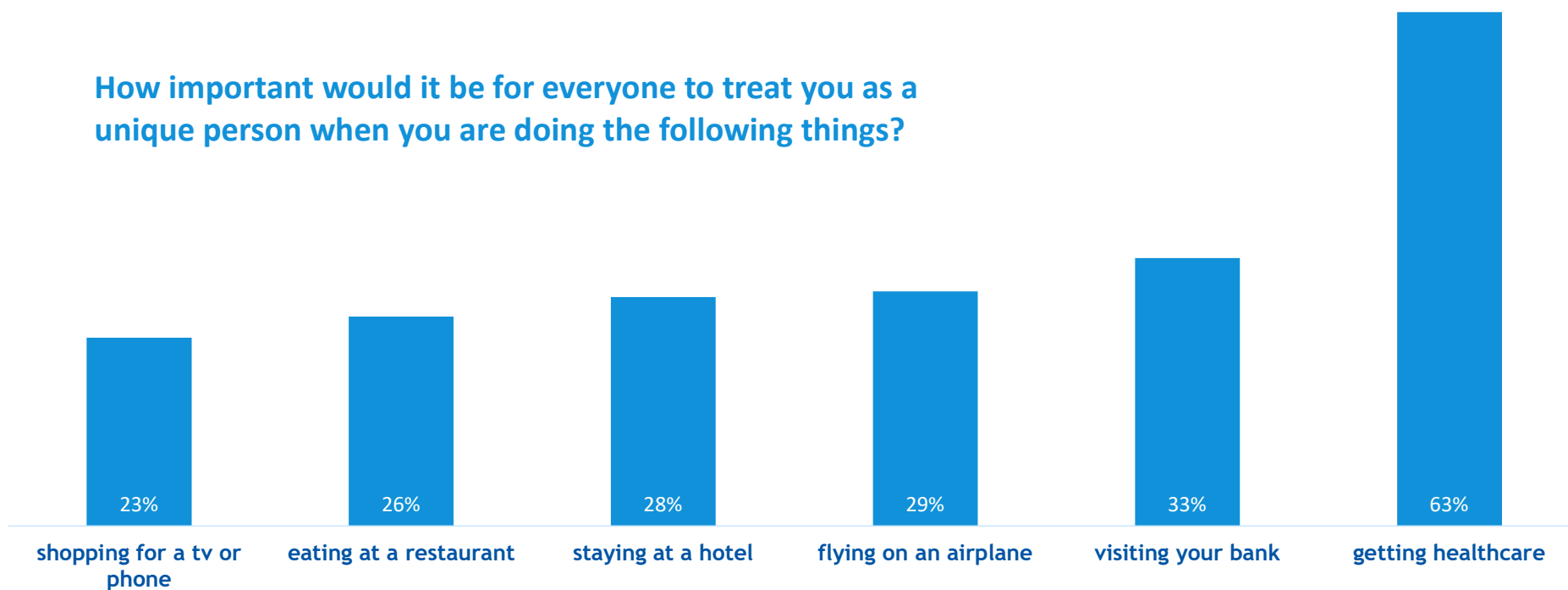
An at-home Covid-19 test from Cue Health uses an electronic reader.
PHOTO: CUE HEALTH



Source Wallstreet Journal, 2022, LetsGetChecked.com, 2022

Does Personalization Matter in Healthcare?

How important would it be for everyone to treat you as a unique person when you are doing the following things?



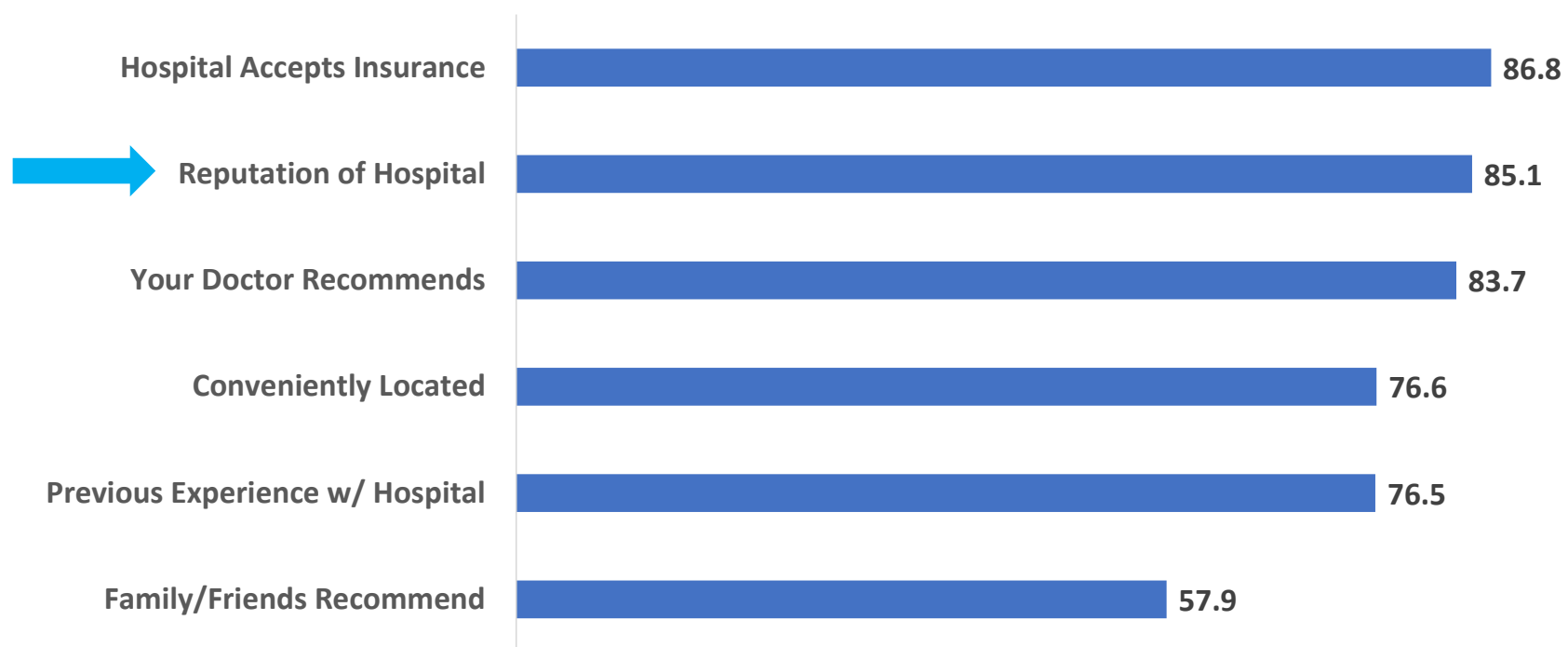
N = 68,613 national survey



People who felt they were treated as unique are **312%** more likely to rate an organization's overall image/reputation as 'excellent'.

Reputation is a “Big Three” Selection Factor for Consumers

How important would the following factors be to you when selecting a facility?



SOURCE NRC Health's Market Insights survey of consumers, 2020, national n size = 292,510



Five-Step Framework for Strategic Branding

CURRENT STATE	<ul style="list-style-type: none">• What is our current brand according to consumers?• What is the current position of our brand?
TARGET	<ul style="list-style-type: none">• What are their needs?• How have their priorities shifted?
FRAME OF REFERENCE	<ul style="list-style-type: none">• What is the competitive set?• What does the target audience think of them?
POINT OF DIFFERENCE	<ul style="list-style-type: none">• Why should they choose you over competitors?<ul style="list-style-type: none">– Benefits provided, beyond functional, to create uniqueness– Identity of the brand: what the brand stands for; reinforcing characteristics
REASONS TO BELIEVE	<ul style="list-style-type: none">• How should the brand deliver on the value proposition positioning and deliver the promised benefits?<ul style="list-style-type: none">– Supporting “facts”, big or small, that provide a basis for the consumer to believe that the brand can deliver on the positioning; builds long-lasting relationship





Four Priorities for 2023 and Beyond

- **COVID's chaos is chronic but it's not all bad news**
We have opportunities amidst the craziness and must take them
- **Consumers are back and they are ready for something better**
More than switching brands, they want us to prove we are worth it
- **An identity crisis is always a precursor to a new you**
Our brand's fate rests with our audience and how they feel is our reality - this is the fuel we need to make ourselves better
- **Future care must align to future journeys**
Consider the consumer - including employees - your starting point
- **Bonus Point:** Don't let outside forces determine your identity



Patient No Longer Donohue



Join ACHE Contact Us Membership Directory Blog Donate LOGIN Search by keyword

ABOUT ACHE FACHE LEARNING CENTER CAREER RESOURCE CENTER CHAPTERS MEMBERSHIP

CONTENTS

Learning Center

EDUCATION AND EVENTS

PUBLICATIONS

Journals

Books

New Releases

Book By Topic

Higher Education

Professional Learning

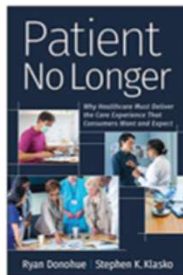
General Information

Newsletters

Healthcare Executive Magazine

RESEARCH

HAP Summer Sale - Order any book or self-study course now through Sept. 30 and receive a 20 percent discount when you use the promo code SUMMER20 at checkout. This discount excludes any already discounted bundles, Futurescan 15-packs, and the Board of Governors Exam Study Set and Flashcards



Patient No Longer: Why Healthcare Must Deliver the Care Experience That Consumers Want and Expect

Ryan Donohue, Stephen Klasko, MD
ISBN: 978-1-64055-180-0
Softbound, 179pp, 2020
Order Code: 24151
ACHE Management

ADD TO CART

REQUEST EXAM COPY

Member Price: \$33.60
Non Member Price: \$48.00

By Topic: Patient Experience Patient-Centered Care



Ryan D. Donohue

@RyanDDonohue



"Patient No Longer" Podcast