

Identity Crisis

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

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Roadmap

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

Healthcare's Chronic Chaos



Source Tatiana O'Toole, dribbble.com

Healthcare's Chronic Chaos

- COVID united then divided; financial and workforce challenges feel like a new phase of the pandemic
- 1 in 3 potential patients are current deferring their care
- 1 in 3 returning patients lack any brand preference
- Telemedicine and Virtual Care usage has predictably plateaued

"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*

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

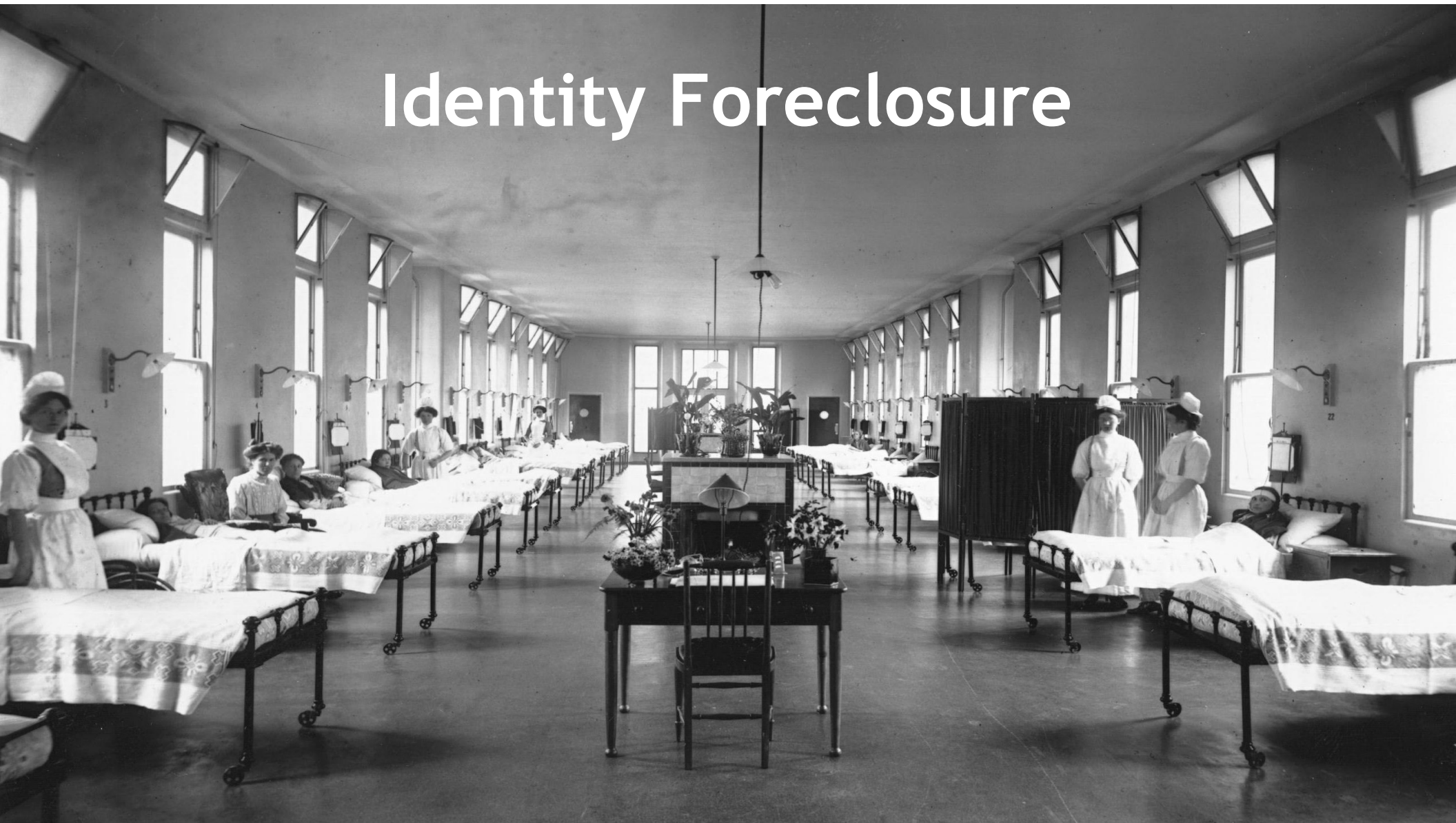
Identity Moratorium

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

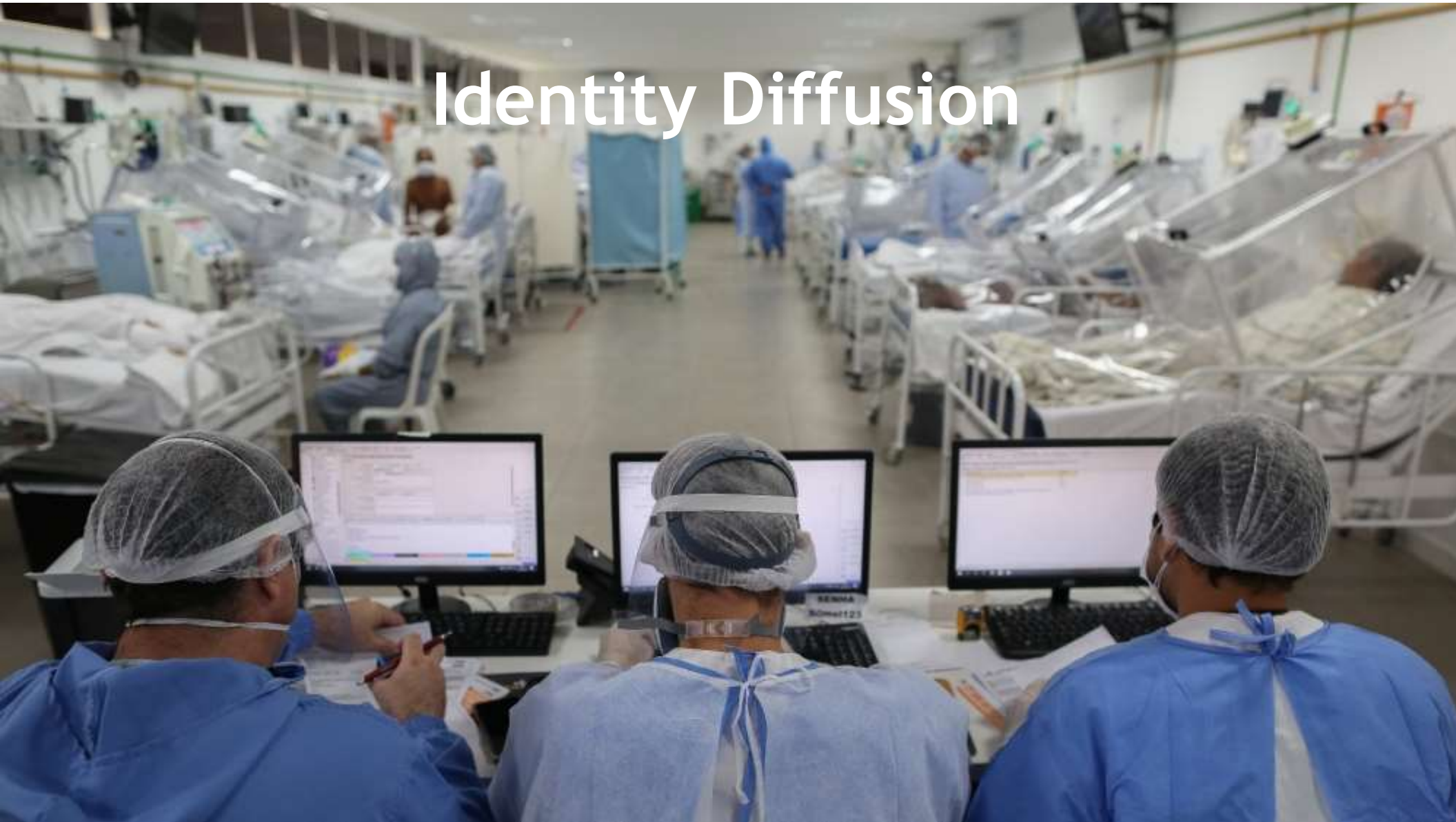
Identity Achievement

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



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— 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: The COVID-19 Health System™

- Our powerful show of unity left behind a blur of brands
- 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
- Health systems are struggling to send new messages
- Without COVID to define us, who are we?

Consumerism's Big Comeback

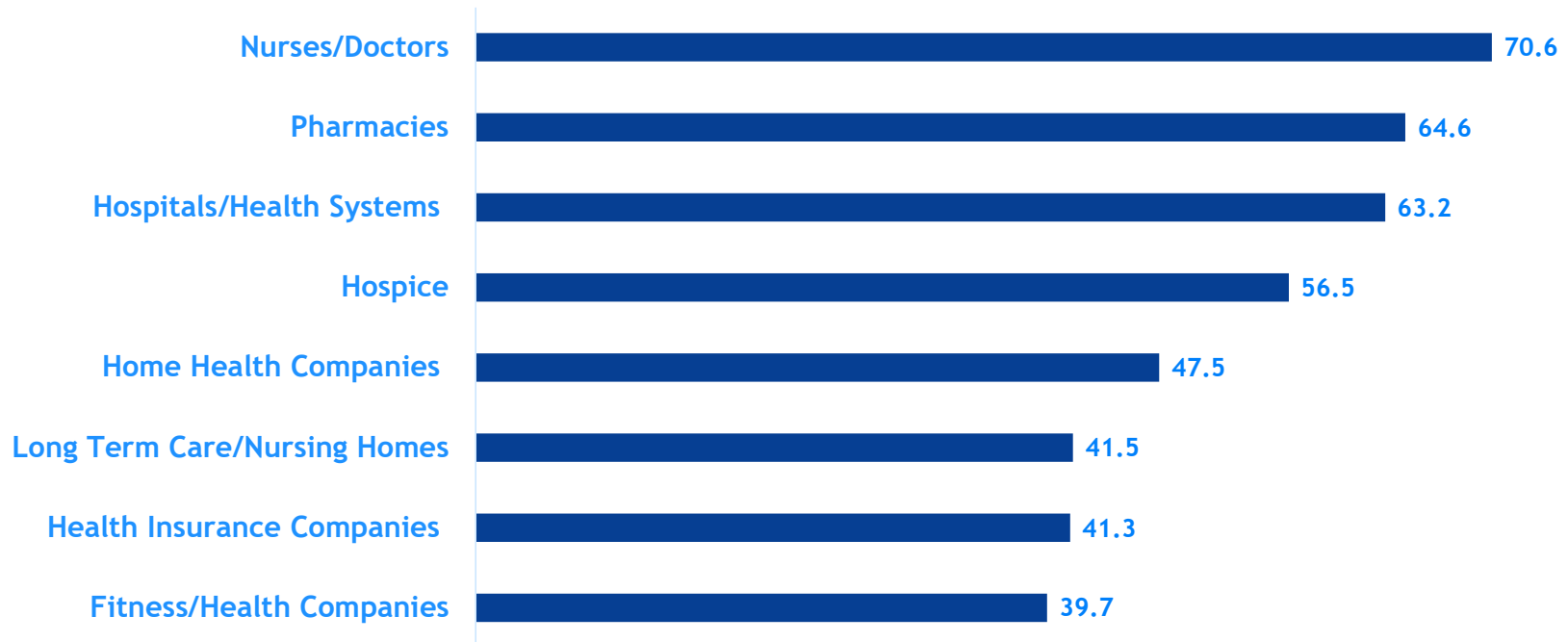


How Do Consumers Perceive Us Right Now?

- ‘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)

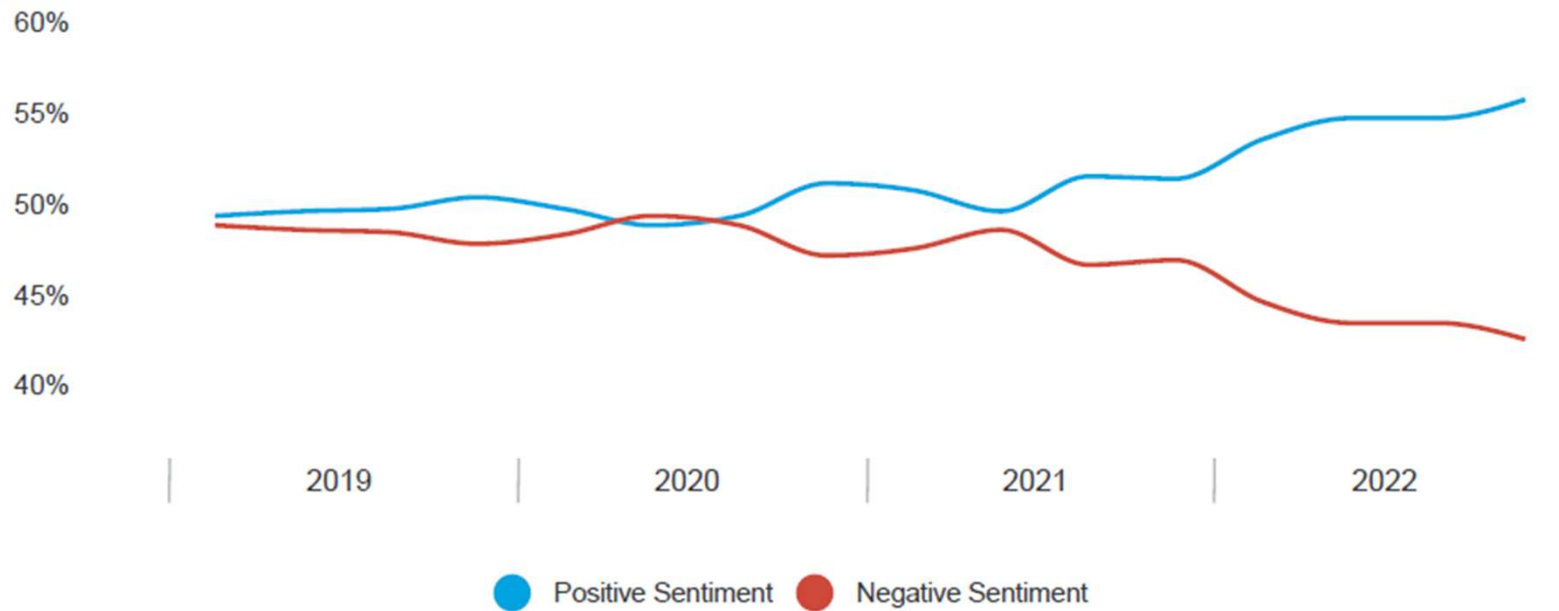


SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2022-2023, n size = 75,364

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 to receive 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

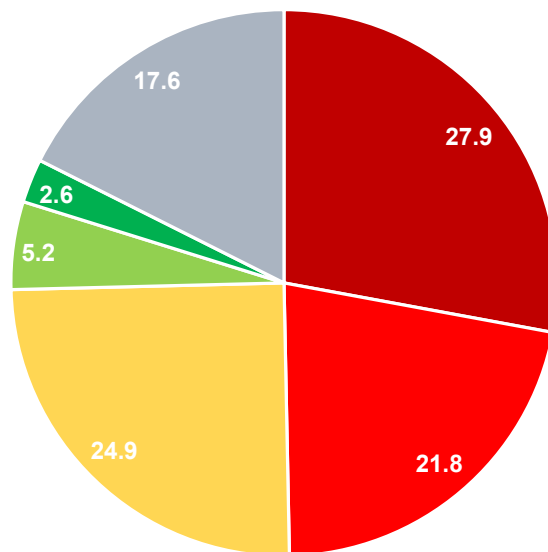
Consumer Sentiment Toward Care in Retail Settings



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

Affordability Continues to Elude Healthcare Consumers

Agree or Disagree: Prices charged by doctors and hospitals have risen just as much as other expenses (gas, food, rent, etc.) over the past year?



■ Strongly agree ■ Somewhat agree ■ Neither disagree nor agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know/Not sure

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

Healthcare is a message away

Get treatment for common health concerns at your convenience—no appointments or video calls required.

Find a treatment

Featured

UTI

COVID-19

Erectile dysfunction

Pink eye

Birth control



No appointment needed

Start a visit quickly and discreetly, whenever works best for you.

Personalized treatment

Your clinician will review your symptoms and prescribe treatment.

US-licensed clinicians

We work with qualified doctors and nurse practitioners.

Your health data is secure

All of your information is protected by our practices and by law.

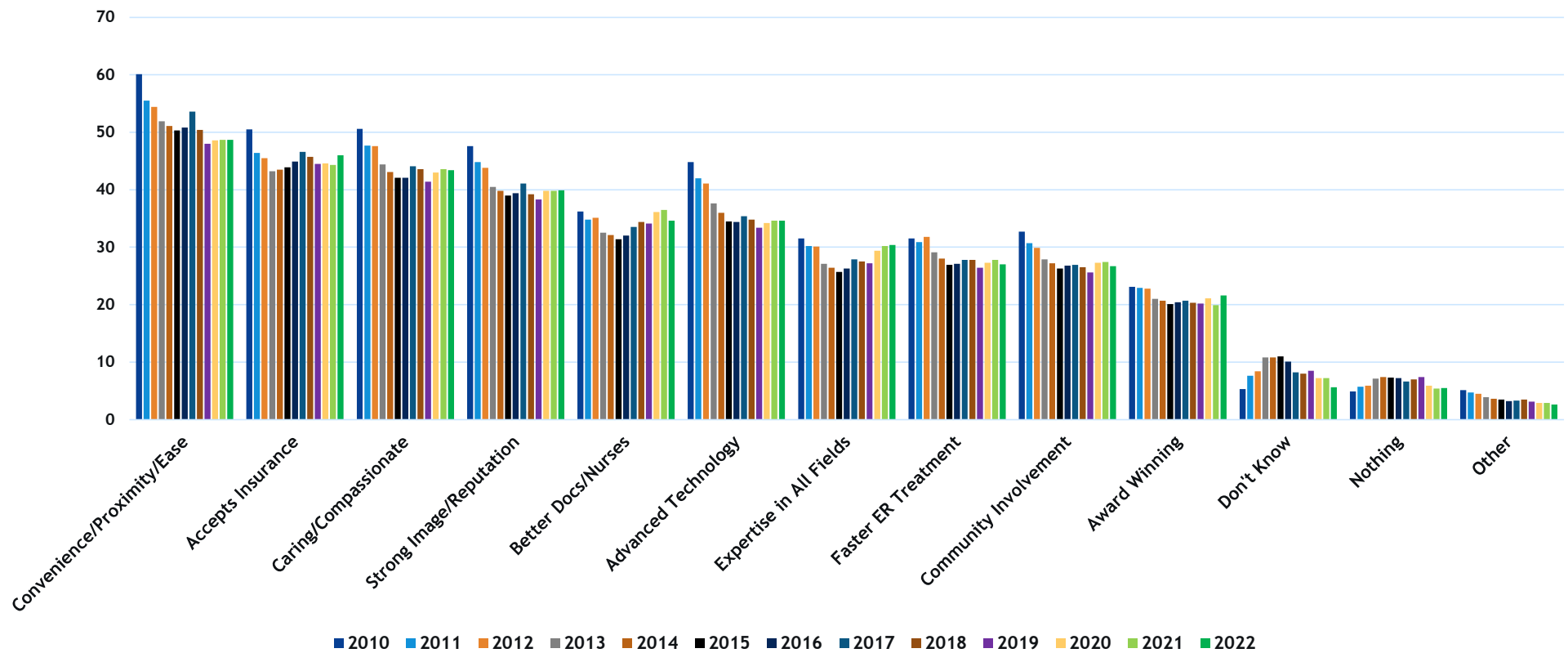
Outside Healthcare





Forging a Future Identity

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

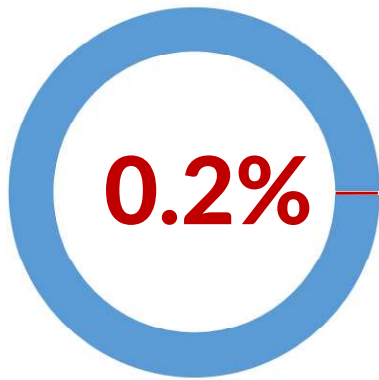
Staff attitude
Staff knowledge
Staff presentation
Service response & follow-up

FACILITY

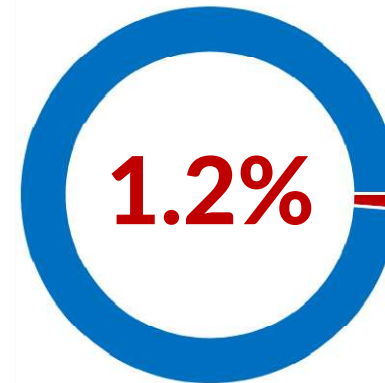
Parking
Presentation & appearance
Way-finding
Cleanliness
Care environment



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?

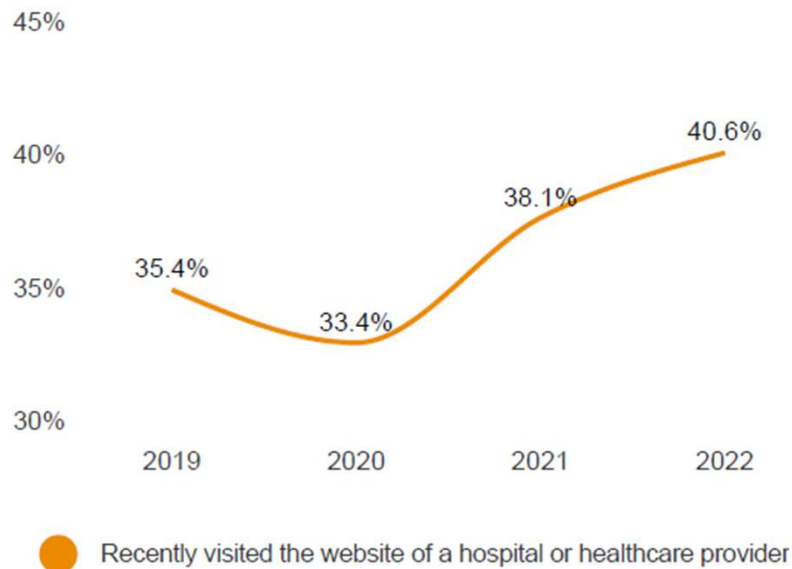


Kickstart my care

Come my way

Make it personal

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

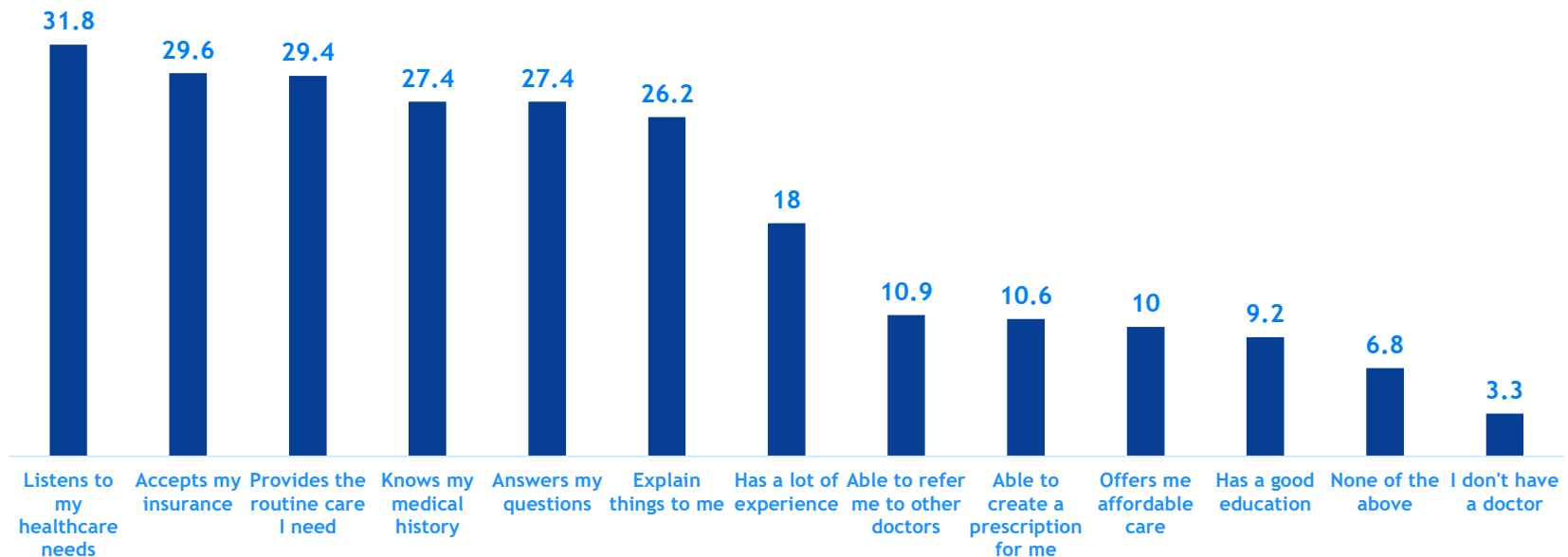
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Why Do You See Your Doctor? What Makes Them Valuable?

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



Kickstart my care

Come my way

Make it personal

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

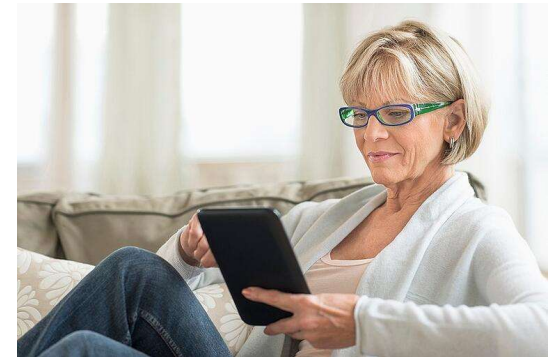
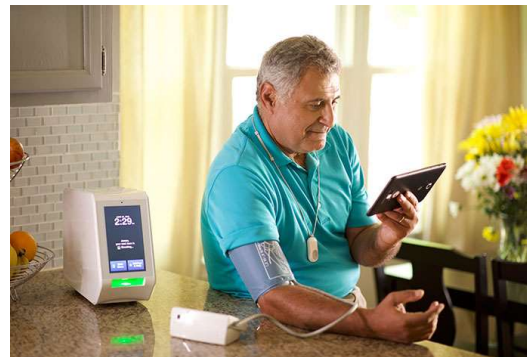
HEALTH

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



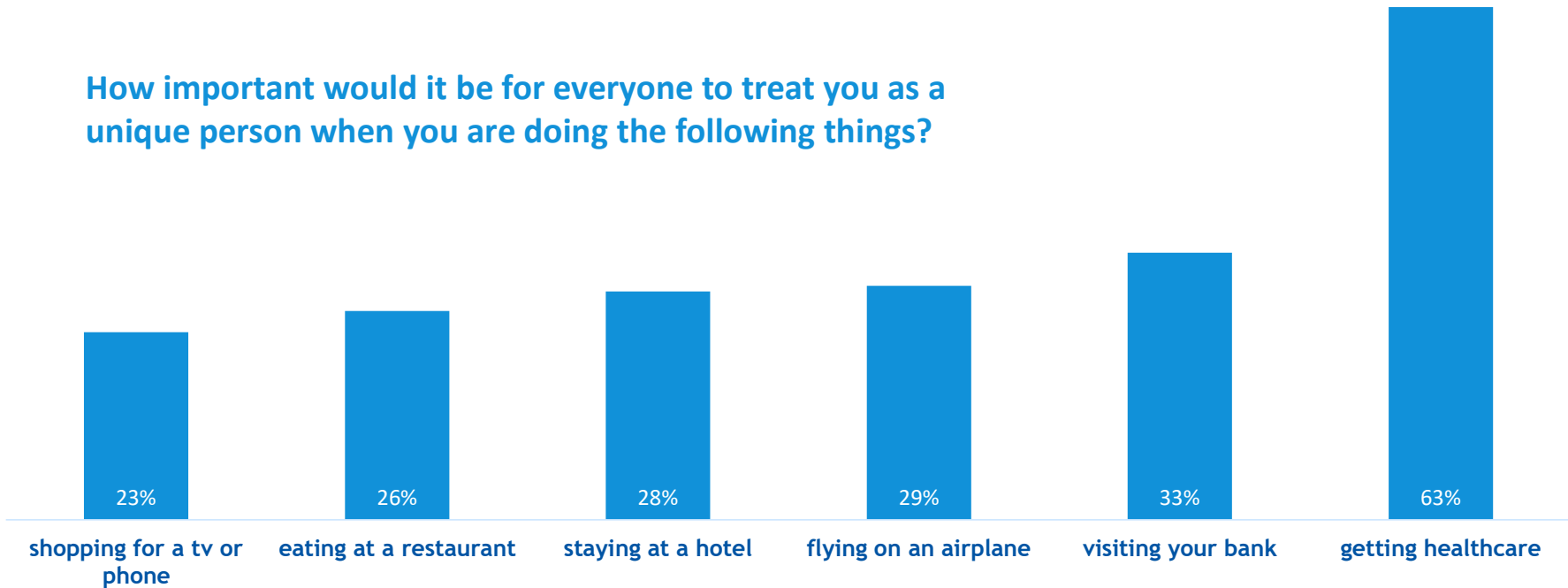
Kickstart my care

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Make it personal

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?



Kickstart my care

Come my way

Make it personal



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

Kickstart my care

Come my way

Make it personal

Reputation is a “Big Three” Selection Factor for Consumers

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



Kickstart my care

Come my way

Make it personal

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



Brand Questions at the Board Level:

→ **What is our current brand?**

Do consumers agree with our assessment?

→ **What do we clearly do best?**

Can consumers get it anywhere else?

→ **How do we measure our brand?**

How *should* we measure our brand?



Four Priorities for 2023 and Beyond

1 COVID's chaos is chronic but it's not all bad news

We have opportunities amidst the craziness and must take them

2 Consumers are back and they are ready for something better

More than switching brands, they want us to prove we are worth it

3 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 our motivation to build ourselves up

4 Future care must align to the individual receiving care

Consider the consumer - including employees - as your starting point



Patient No Longer Donohue



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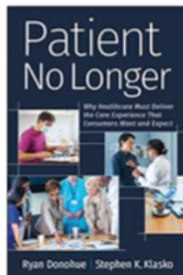
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Patient No Longer: Why Healthcare Must Deliver the Care Experience That Consumers Want and Expect

Ryan Donohue, Stephen Klasko, MD
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