

**PROPHET**

# Making the Healthcare Shift: The Transformation to Consumer–Centricity

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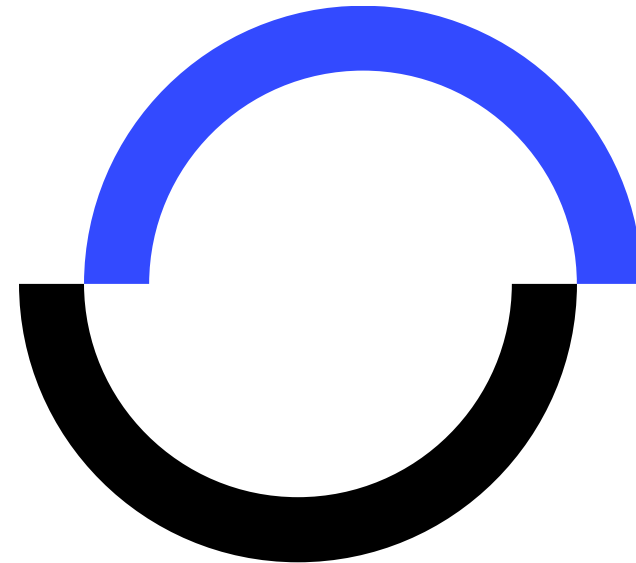
**Scott Davis**

Chief Growth  
Officer, Senior  
Partner

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**Jeff Gourdji**

Partner,  
Healthcare  
Practice Lead



# Prophet is a growth and digital transformation firm that helps client – in and out of healthcare - drive uncommon growth

## Marketing & Branding

How can we accelerate growth? What growth moves?

How can we use data and digital marketing more effectively?

How can sales adapt to a more omni-channel buying environment?

## Brand & Activation

How can we increase brand relevance?

How can we best organize the brand portfolio to support business growth?

## Experience & Innovation

How do we re-envision our customer experience to drive our next wave of growth?

What customer touchpoints can be redesigned or created to deliver a better experience?

How do we create new digital products that enable market disruption?

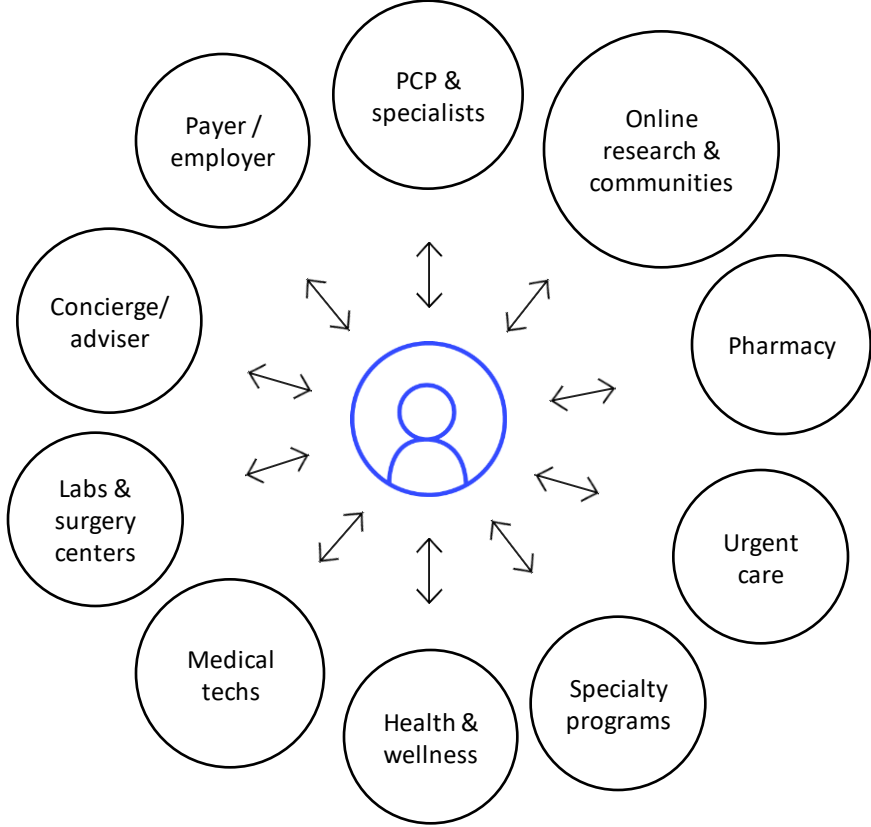
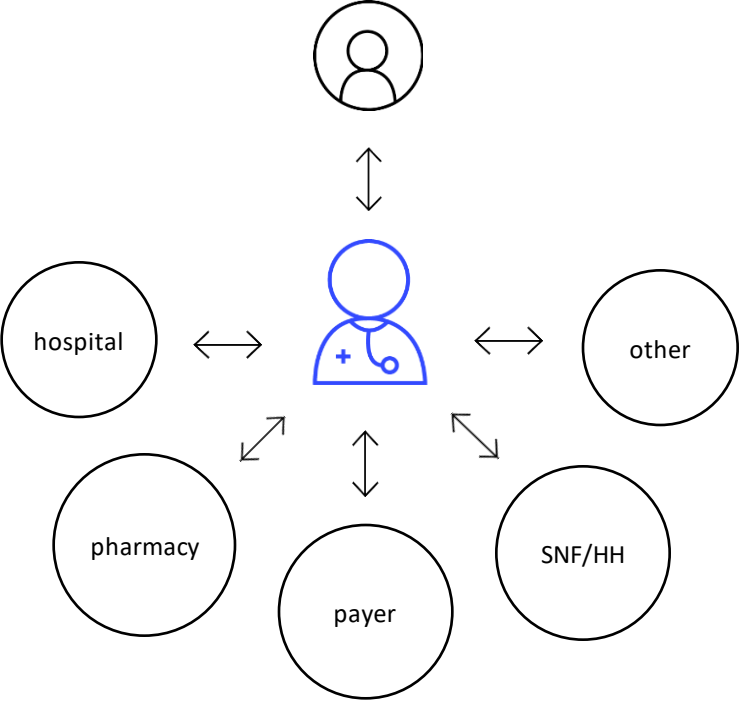
## Organization & Culture

How might we transform our organization to power growth?

How might we build and sustain the capabilities we need to win in a digital world?

How might we create a culture that thrives on change?

# Macroeconomic forces and changing needs continue to reshape the doctor/patient relationship



Greatest Generation

Baby Boomers

Generation X

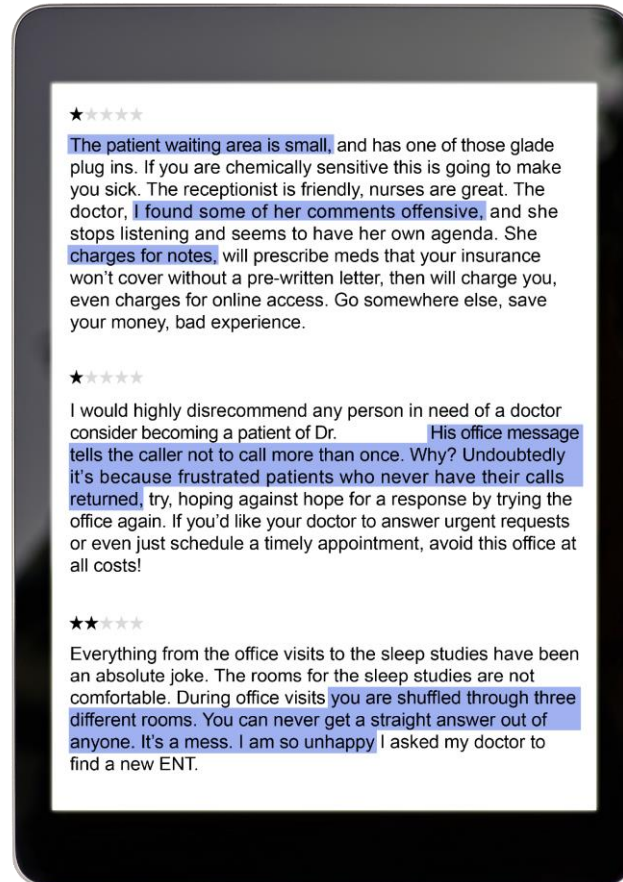
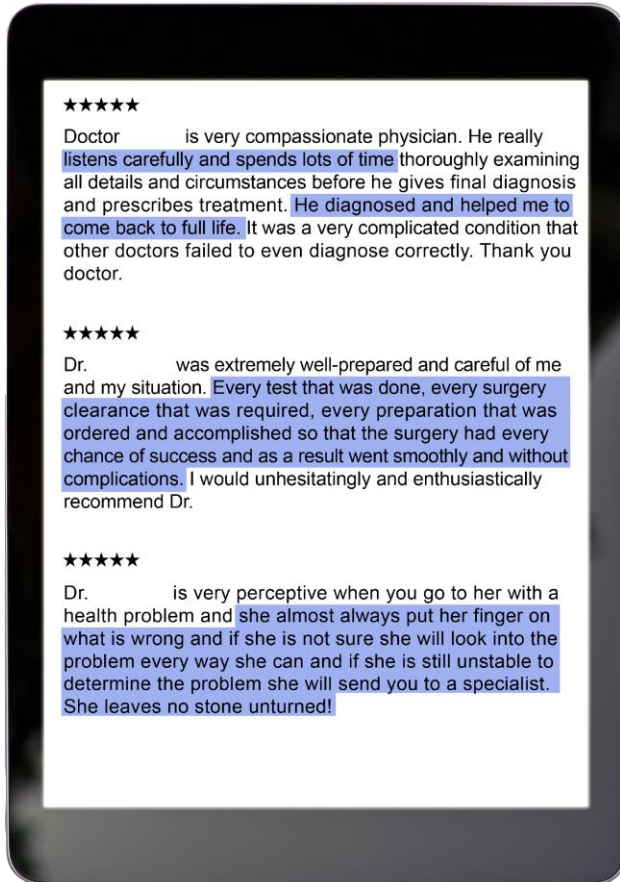
Millennials

Generation Z

# Today's physicians are rewarded for empathy, and penalized for lack of consumer-centricity

★★★★★ = Care & Empathy

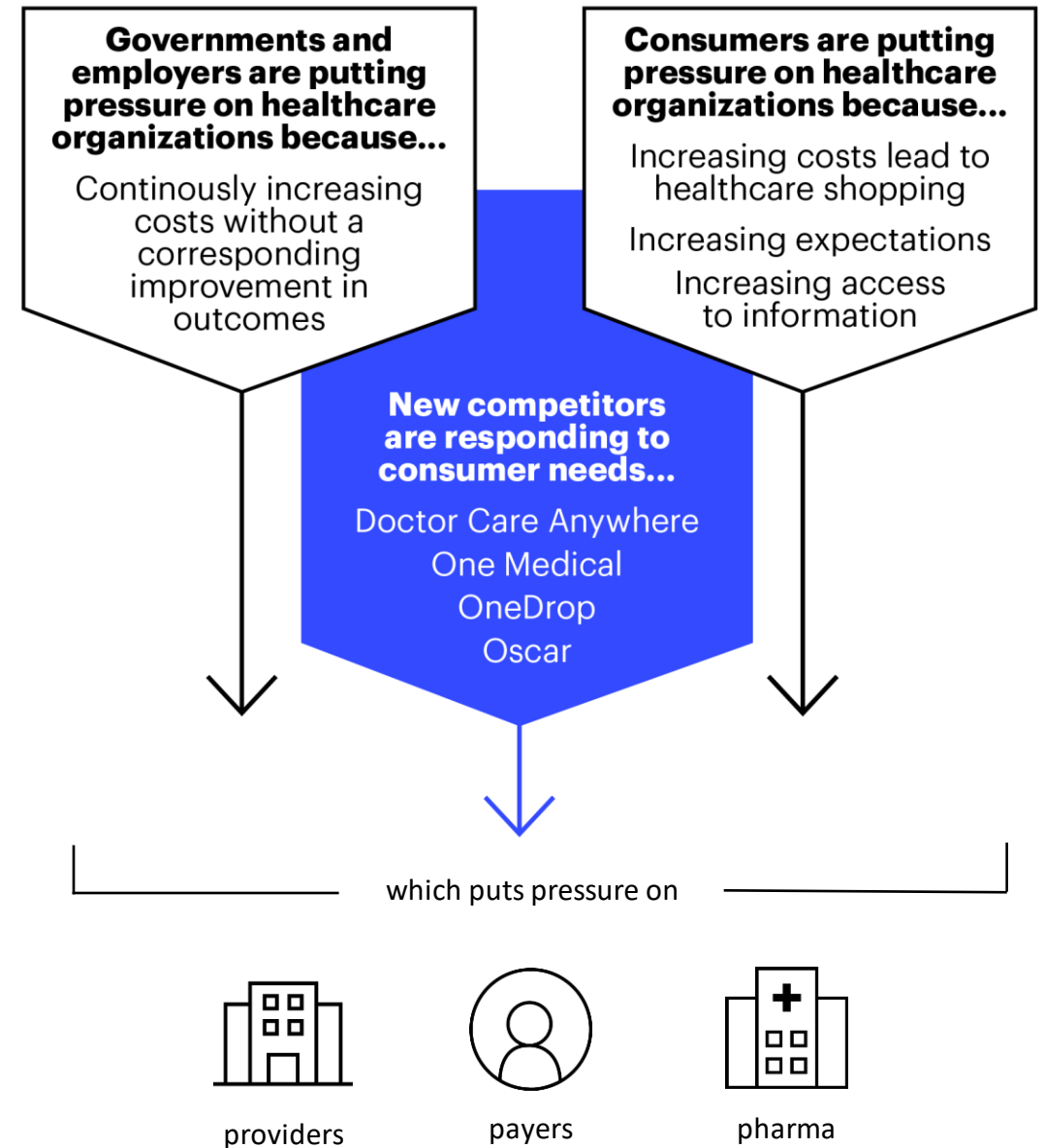
★ = Inconvenience & lack of empathy



# The pressure to become more consumer-centric will continue

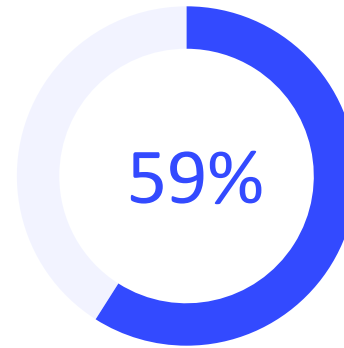
Consumer-centricity in healthcare means having a consumer-first mindset in order to create relevant products, services, and experiences to:

- Win with those who are shopping
- Lower costs and improve outcomes by helping patients take greater ownership of their own health

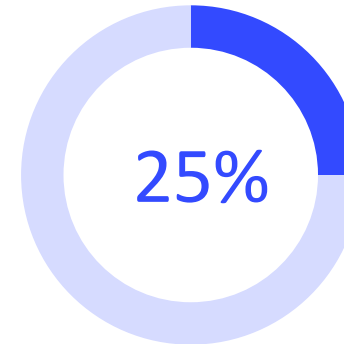


# There is pressure from governments and employers to lower costs and improve outcomes

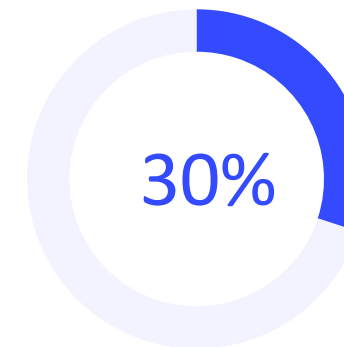
As healthcare costs rise across the world, governments and employers who ultimately pay for healthcare are being squeezed. As resources dwindle, healthcare organizations are considering different business models



of all payment models by 2021 will be a mix of capitation, pay-for-performance, and episodic payment—all various forms of value-based care.



of health plans already have at least one outcomes-based contract with a drug manufacturer



of health plans are currently negotiating one or more such contracts.

# While the path to success remains unclear, a wide array of healthcare organizations are moving to greater consumer–centricity

**MetLife**



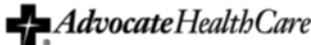
Anthem



Geisinger Health Plan



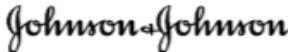
**aetna**



patientslikeme



Indiana University Health



# Based on these conversations, we identified five key shifts that healthcare organizations need to make to become more consumer-centric

●  
THE FIRST SHIFT

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From Tactical Fixes to a Holistic Experience Strategy

●●  
THE SECOND SHIFT

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From Fragmented Care to Connected Ecosystems

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THE THIRD SHIFT

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From Population-Centric to Person-Centered

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THE FOURTH SHIFT

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From Incremental Improvements to Pervasive Innovation

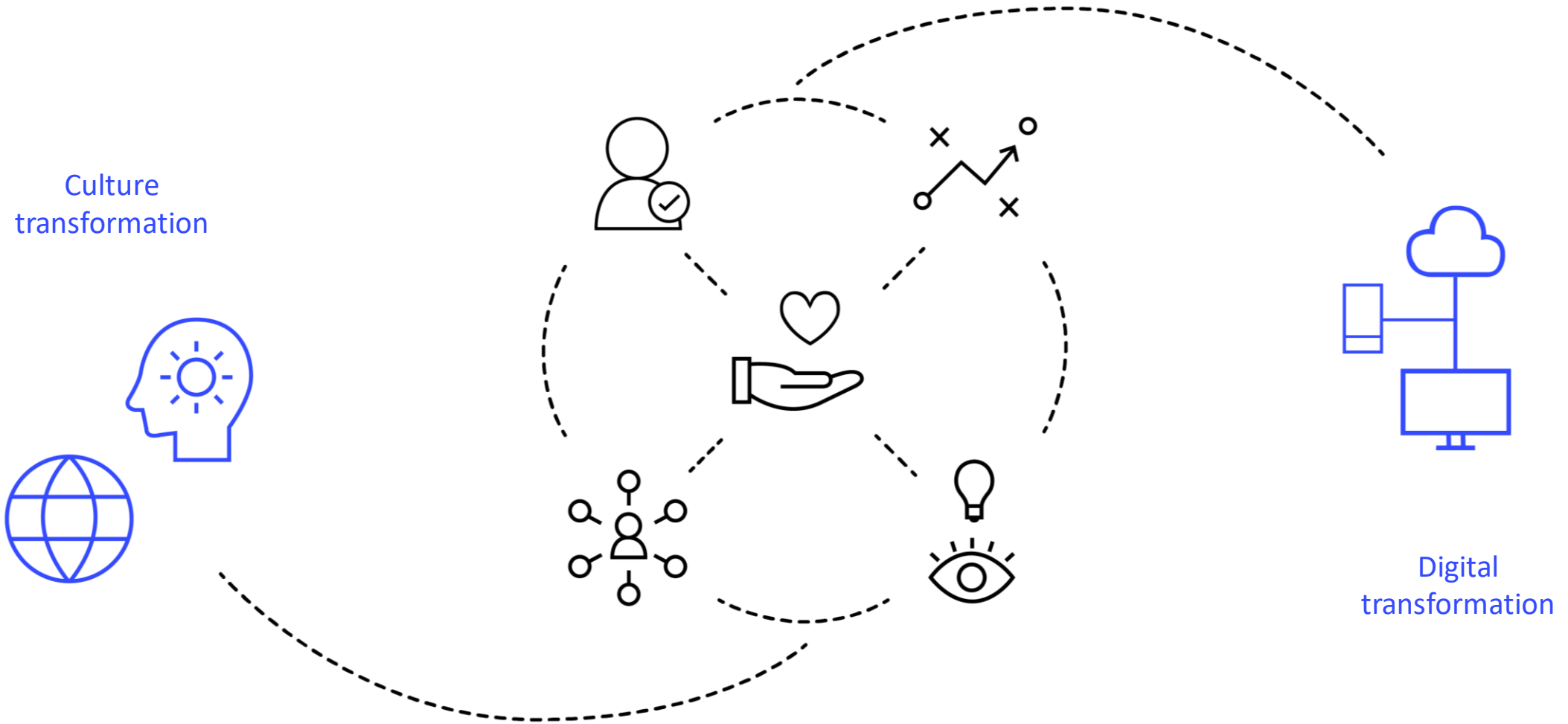
●●●●●  
THE FIFTH SHIFT

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From Insights as a Department to a Culture of Consumer Obsession



# Culture and digital transformation also play key roles throughout





# From Tactical Fixes to a Holistic Experience Strategy

*At Novant Health, consumer experience is approached holistically. It is built into every strategic element we have.*

CARL ARMATO

CEO, Novant Health



# By considering the entire health journey, healthcare organizations can elevate CX to a strategic priority

FROM

CX as a *to-do* item

Touchpoints-oriented

Fixing what is broken

TO

CX as something the business organizes around

Relationship-oriented

A brand experience

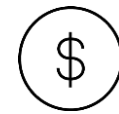
# Geisinger

Geisinger Health System's proven Experience Refund Program elevated CX to a strategic priority by putting money on the line

*When you go into a Starbucks and you don't like the coffee, I've never heard a barista say, 'No, we made it the right way, you have to drink it.' They just take care of you. This is about patient care, people taking care of people. We want to get it right every time with every patient.*

DR. DAVID FEINBERG  
CEO, Geisinger Health System

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\$500,000 was refunded within the first year, resulting in



- Better relationships with patients



- Understanding of experience pain-points



- Publicity and media coverage



# From Fragmented Care to Connected Ecosystems

*The system is so fragmented.  
It is a burden on patients and  
it is incredibly disempowering.*

JEFF DACHIS

CEO, One Drop



The healthcare industry is fragmented among its players, putting undue burden on patients who must manage these stakeholders without guidance

FROM

TO

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Discrete responsibilities

Empowered problem solvers

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Exclusive in-house design

External collaboration and partnership

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Owning your piece

Owning the entire journey

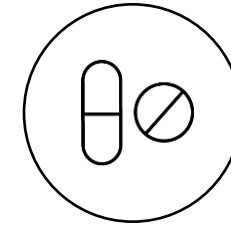


# Providers need to develop solutions that take into account all factors impacting health and recovery

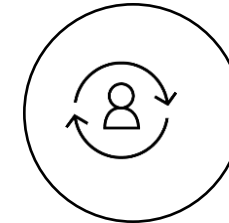
Mount Sinai Health System began offering a bundled total joint replacement package program including...

- Physical Therapy
- Care Guide
- Price Reference

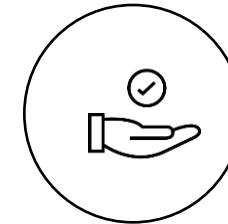
## How to get to “plus product” solutions:



**PRODUCT**  
Drug, service or plan is the primary product



**PLUS PRODUCT**  
Drug, service or plan is part of a solution ecosystem package



**PRODUCT PLUS**  
Drug, service or plan comes with wrap-around services



# From Population–Centric to Person–Centered

*People define value differently. For someone like myself who is healthy and busy, high-value care is all about convenience and access. And that's very different from someone who has two different chronic diseases and moves in out and out of homelessness.*

NIYUM GANDHI

EVP and Chief Population Health Officer,  
Mount Sinai Health System





THE THIRD SHIFT

Healthcare organizations typically paint patients with a broad brush when it comes to experience design and should consider greater customization

FROM

TO

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Disconnected collections of data

Data that tell a patient's story

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Universal experiences

Customizable experiences

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A demographical view of patients

A multidimensional view of patients



# From Incremental Improvements to Pervasive Innovation

*You fight the hesitation by innovating in small ways and proving yourself. You fight it by proving a positive ROI and always bringing the customer voice to the table.*

MARGARET COUGHLIN

Senior Vice President,  
Mount Sinai Health System



Healthcare organizations need to create a culture in which commercial innovation isn't stifled by scientific methods

FROM

TO

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Optimizing irrelevant experiences

Launching new ideas that resonate

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A culture modeled after the lab

A culture modeled after a start-up

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Perfection the first time

Tests that learn and evolve over time

Advocate Healthcare started offering same day scheduling in mammography, continued to improve the offering and expand it across the system

Program development:



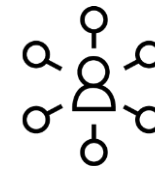
VERSION 1.0

Call today, be seen today in mammography



VERSION 2.0

Call today, be seen today, get your results today, in mammography



GOAL

Call today, be seen today, for all appointments



# From Insights as a Department to a Culture of Consumer Obsession

*We have to put ourselves in the shoes of patients and make sure that everything we are doing from drug development through market launch is with the patient front and center. From the differences between medical needs to the differences between how each patient receives information, this deep understanding is key.*

ANGELA HWANG

Global President,  
Inflammation and Immunology, Pfizer



Healthcare organizations have an opportunity to use insights to create products, services, and offerings that are better tailored to consumer needs

FROM

How we are doing

Insights that influence marketing decisions

Asking consumers

TO

What we should be doing

Insights that influence a range of business decisions

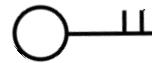
Asking, observing, and analyzing consumers



To become insight-driven, organizations must be able to surface relevant consumer knowledge that will influence decision-making

INSIGHTS OPERATING SYSTEM (IOS):

An organizational structure that is equal parts consumer-insight processes and outcome-oriented decisions



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KNOWLEDGE

Once insights have been uncovered, organizations need mechanisms in place to act on them and incorporate into decision making



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ACTION

Organizations need to develop the capability to uncover consumer insights

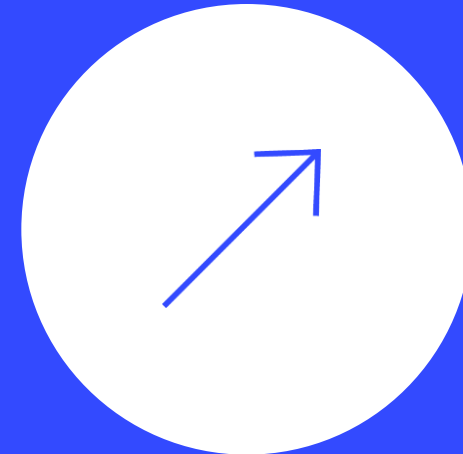
# These five shifts will have great payoffs



more engaged  
consumers



lower costs



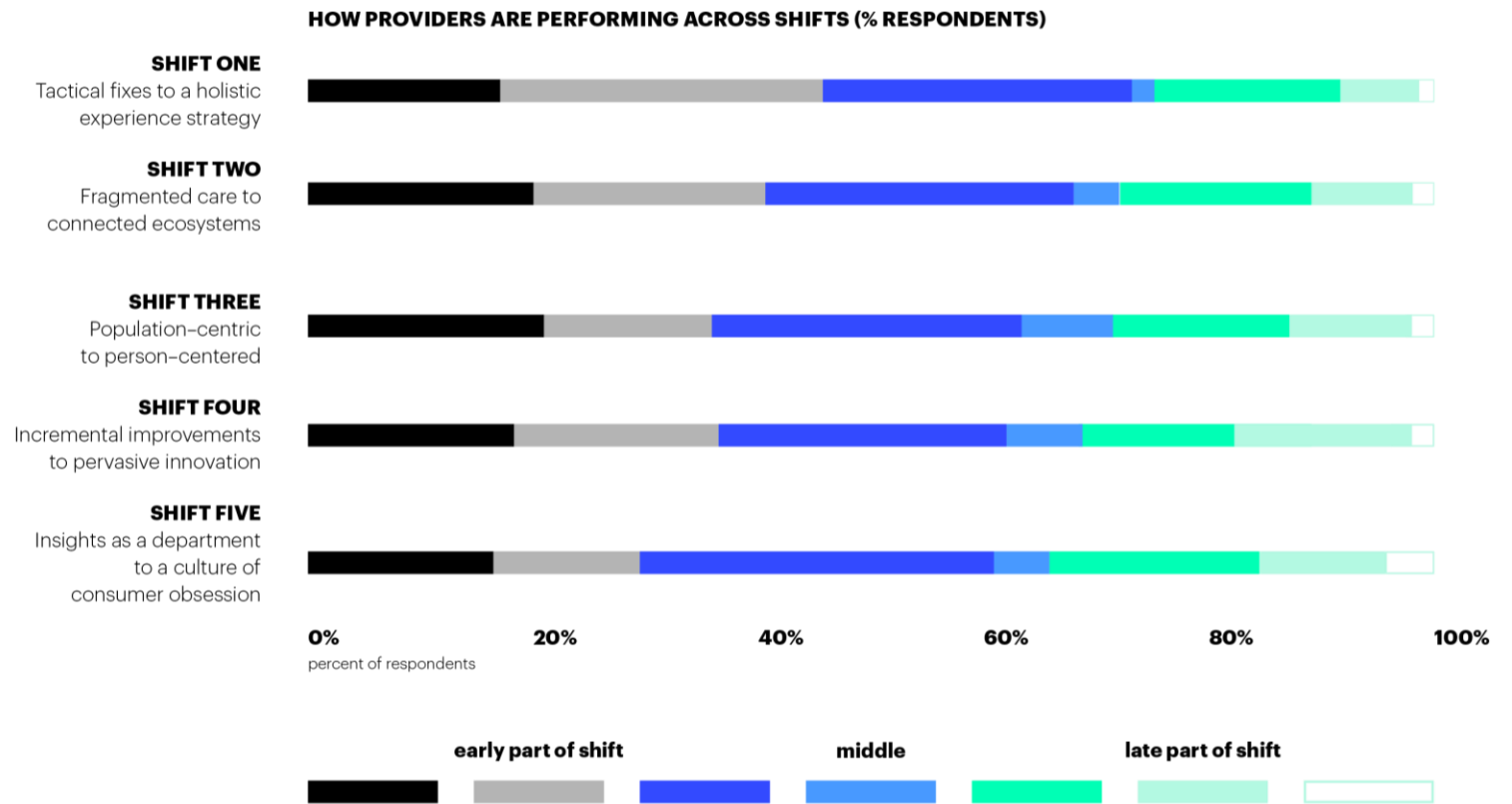
greater outcomes



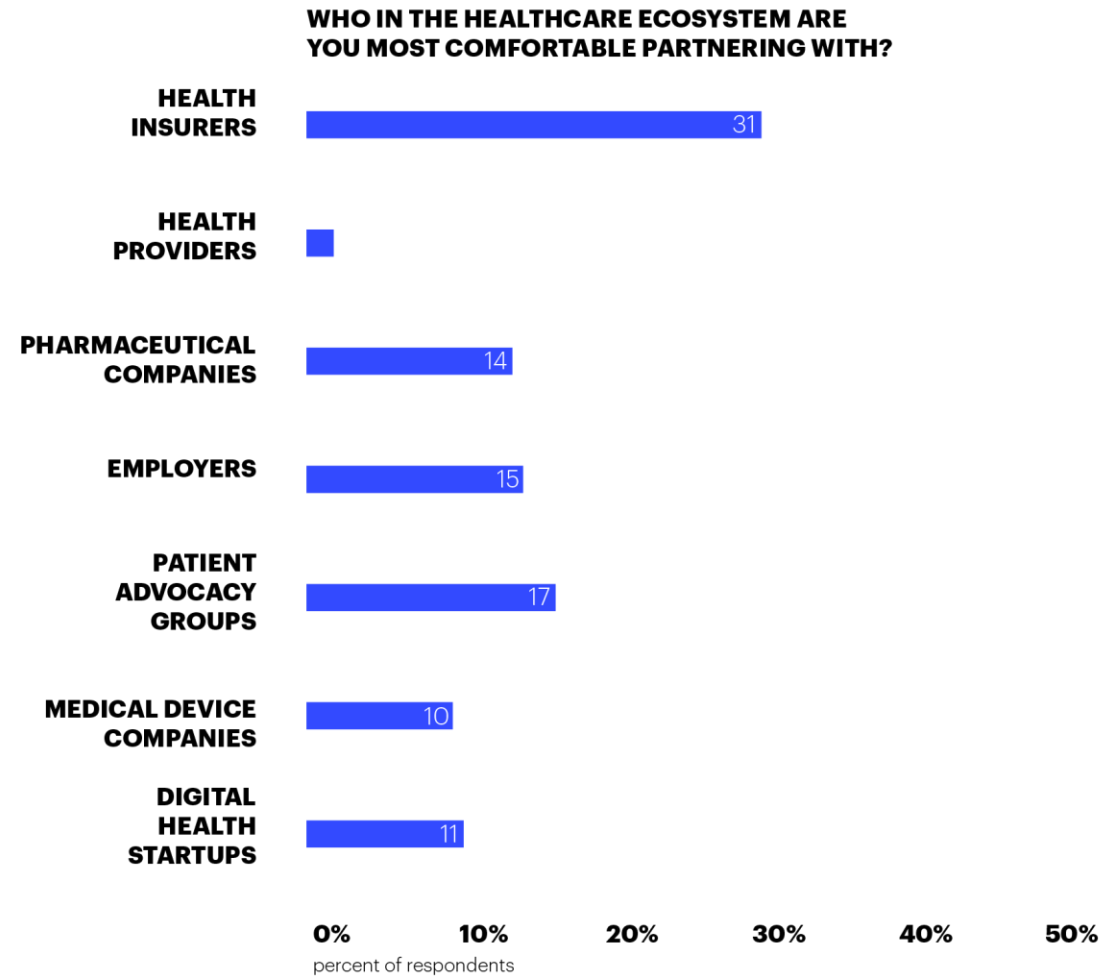
# The state of consumer–centricity: progress on the shifts

Providers have made the most progress on the Fifth Shift, and the least on the First Shift

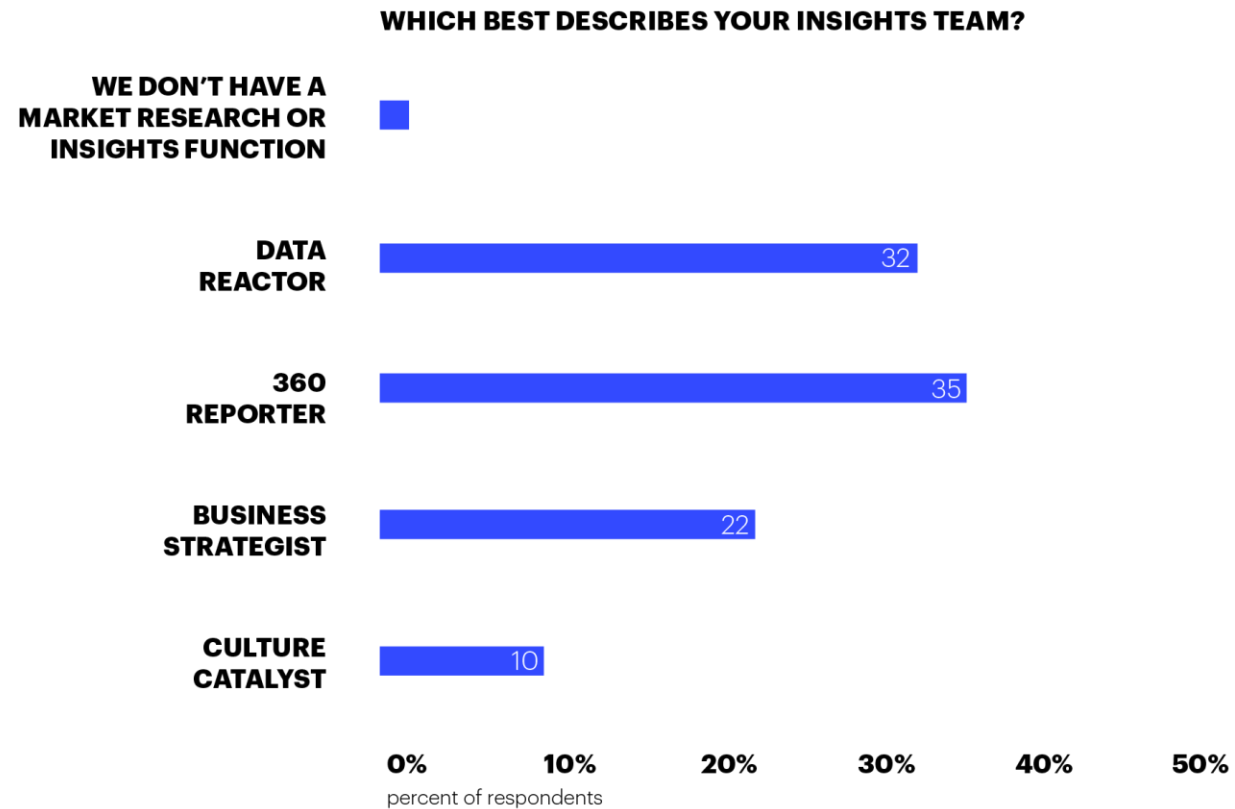
Historically providers have only seen their role with patients while they are in the clinic, but with value-based care becoming increasingly important, providers need to discover ways to build an experience that spans the healthcare journey.



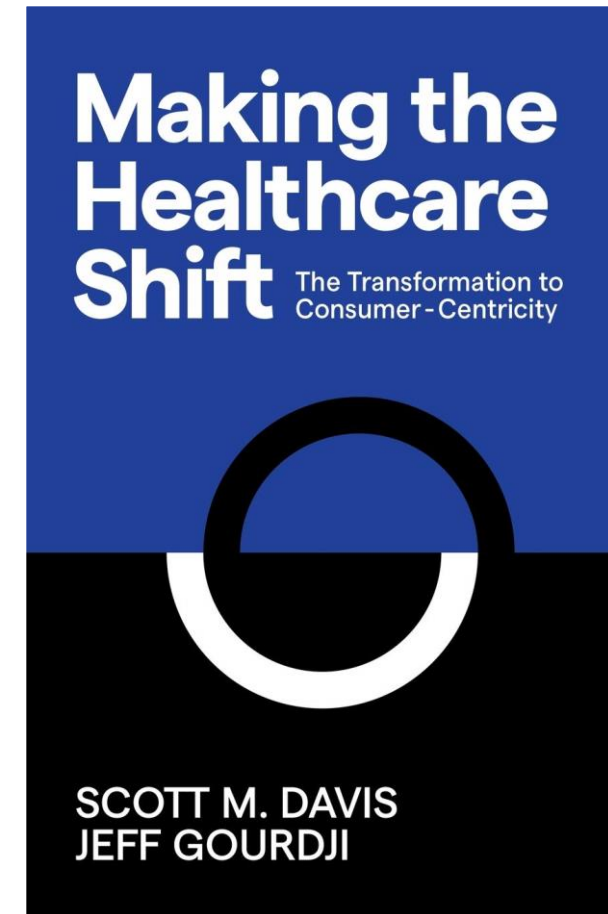
# The state of consumer–centricity: partnership willingness



# The state of consumer-centricity: role of the insights function



For more stories of how providers are making the shift and what they can do to win in a consumer–centric world, look for your copy of [Making the Healthcare Shift: The Transformation to Consumer–Centricity](#)



# Thank you for joining!



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Scott Davis  
Senior Partner



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Jeff Gourджи  
Partner