

In healthcare and telehealth, brand matters: brands in the era of pandemic-driven change

The third in a series of weekly perspectives from physicians on the challenges of fighting Covid-19

Contributors:
Craig Konieczko
Strategy Director
Steven Lee
Analytics Director

This week we delve into understanding, from a physician's perspective, the role of telehealth and health-tech brands in the Covid-19 and post-Covid-19 world. We've chosen to survey physicians about what areas they feel will change.

As we move forward into a new normal in healthcare, we believe these learnings can be applied to any brand looking to enact positive transformation and demonstrate lessons learned from the most significant chapter in healthcare's recent history.

We understand that these are challenging times for all brand leaders, and so please know we're here to help you navigate. We hope that these findings can lead to new thinking and responses that help us all get to a safe and speedy resolution.

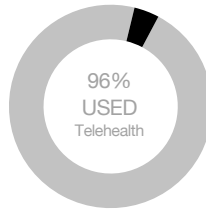
Until a few months ago, the expectation was that face-to-face interactions were the best way to deliver great healthcare. Then Covid-19 happened. A surge of patients with a communicable disease forced providers to use telehealth. Most realized the benefits. We asked physicians for their new perspective. What we learned is that in-person is not always the optimal way to deliver great care.

Data points

Telehealth can deliver a higher level of human touch and deepen patient-physician relationships, while also helping doctors maintain distance or extend reach.

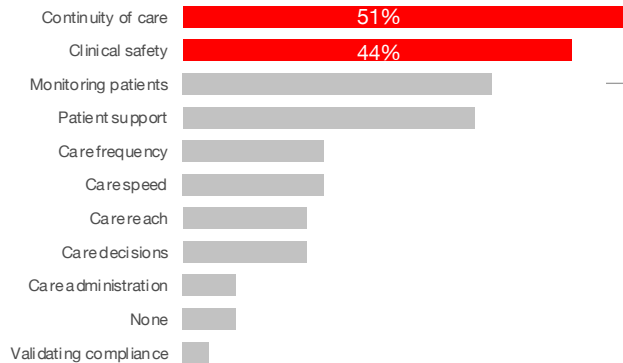
Q1

What are the top benefits that Telemedicine and Telehealth have offered your practice over the last 12 months?



We see opportunities for health-tech to go beyond facilitating real-time, emergency interactions. As doctors seek new ways to deepen their relationships with patients, they want telehealth to emerge as a preferred medium that helps them to address patient needs as no other healthcare channel can.

The role of telehealth will be discovered in gaps along the care continuum.



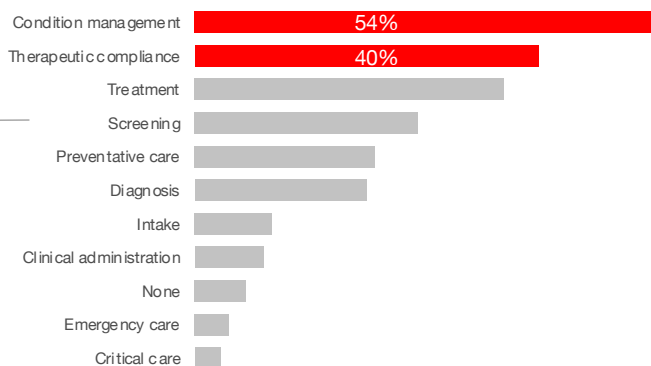
Physicians say they want telehealth tools to enhance continuity of care going forward.

Q2

What are the greatest opportunities for Telemedicine or Telehealth tools to make a greater impact on your practice within the next 12 months?

Data points

Rather than trying to be a general replacement for all in-person visits, telehealth brands can specialize in condition management over time and across distances.

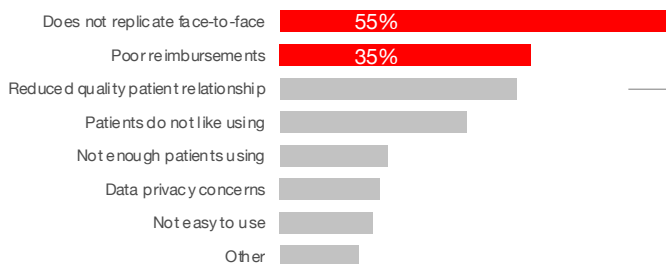


Q3

Where in the care continuum do you anticipate benefits of Telemedicine and Telehealth are most likely to be realized within the next 12 months?

Rather than trying to be a general replacement for all in-person visits, telehealth brands can specialize in condition management over time and across distances. In this way, health-tech brands may be better served by 'connecting the dots' in between in-person care interactions. This extends physicians' reach and addresses the challenges that care gaps can cause, such as lapses in compliance and reduced patient outcomes.

Telehealth must not be a substitute but a main channel of care.



Q4

What are the greatest challenges you have faced using Telemedicine or Telehealth tools over the last 12 months?

The key is to build a brand around human truths pointing to places where physicians are not as well equipped as they want to be.

Don't look at telehealth as a substitute. Physicians want telehealth to connect them with patients. They want telehealth brands to make a better case to payers. They certainly seek tech-driven benefits such as integrated data or protocols, but their top needs are rooted in health not technology.

Look at any health-tech brand as a means to boosting the all-important patient-physician relationship. This happens if and when the service is used at the right time and right place to help physicians do their jobs better than any other channel or tool they have.

Key takeaways

01.

Use technology to bridge gaps along the continuum of care

Many physicians discovered telehealth because it helped them reach Covid-19 patients at home. But this does not mean they will expect telehealth to replace in-person care. Instead, they want telehealth brands to help them reach patients in between face-to-face interactions so they can better manage ongoing conditions and build deeper patient relationships over time.

02.

Offer a new possibility of accessing care with compassion where patients haven't experienced it before

Delve into the patient-provider journey to discover a key insight, or human truth, that surfaces an unmet need at a key moment along the care continuum. This is where you can use your brand and lexicon to help people understand how your technology, digital services and data can bring patients and physicians together, and get closer to the care experience they desire.

In today's interconnected healthcare ecosystem, any product, service or offering has the potential to become mission-critical. The imperative for all healthcare brands is to be prepared for that moment by clarifying their role and offering to every stakeholder. We hope these findings can lead to new thinking and responses that help us all get to a new place that is better equipped not only to handle a future crisis but also the healthcare needs of today.

How the COVID crisis will shape what the future of healthcare looks and feels like

The second in a series of weekly perspectives from physicians on the challenges of fighting Covid-19

Contributors:
Suzanne Martinez
Creative Director;
Barry Silverman
Strategy Director;
Steven Lee
Analytics Director

This week we delve into understanding, from a physician's perspective, what the future should be like as a result of the Covid-19 crisis. We've chosen to survey physicians about what areas they feel will change the most as well as what areas should be prioritized so health systems can incorporate these priorities into their planning for the future, not just for times of crisis but in day-to-day care management.

As we move forward into a new normal in healthcare, we believe these learnings can be applied to any brand looking to enact positive transformation and demonstrate lessons learned from the most significant chapter in healthcare's recent history.

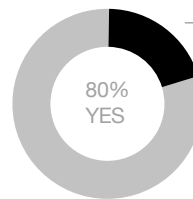
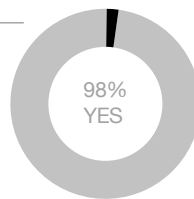
We understand that these are challenging times for all brand leaders, and so please know we're here to help you navigate. We hope that these findings can lead to new thinking and responses that help us all get to a safe and speedy resolution.

Pre COVID-19, the world of healthcare was already in the midst of significant change due to value-based care, the rise of disruptive competition and the desire for usable innovation from consumers as well as others from across the ecosystem. We asked physicians what changes would be most important and substantial post COVID-19 to help organizations prioritize and plan transformation that meets the needs of the future.

Data points

Physicians are confident and optimistic that in the future, the healthcare system will improve to better handle healthcare crisis

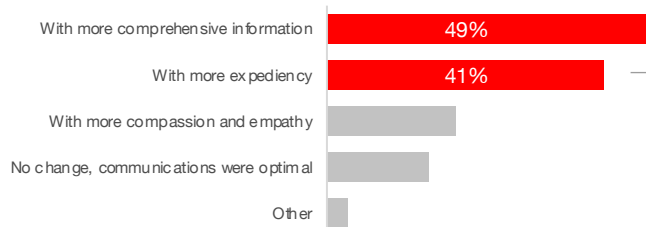
Q1
Will COVID-19 impact the way hospital systems manage their care in the future?



Q2
In the future, will hospital systems be better equipped to handle a healthcare crisis?

Physicians believe that, beyond changing how health systems handle future crises, COVID-19 will play a role in transforming every day / general care.

Physicians want health systems to communicate comprehensive information with expediency in the future



Q3
Given the learnings from the COVID-19 crisis, how might you suggest health systems change the way they communicate with patients and caretakers in the future?

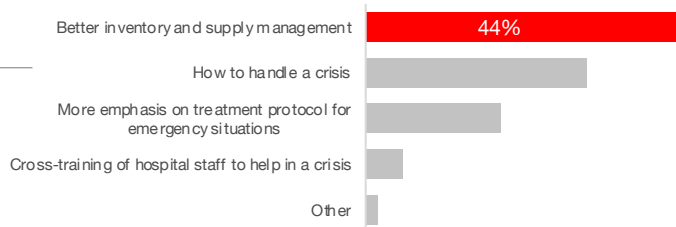
Not surprisingly, when it comes to improving communications physicians underscore the importance of getting timely and comprehensive information to those on the front lines.

The learning here is that when it comes to communication, the "how it's delivered" is just as important as the content itself.

In the future, health systems need to prioritize optimizing and updating communication channels & systems, so that they can insure seamless and efficient delivery of accurate information across entire organizations.

Data points

Physicians believe inventory and supply management were the greatest lessons learnt from COVID-19 crisis



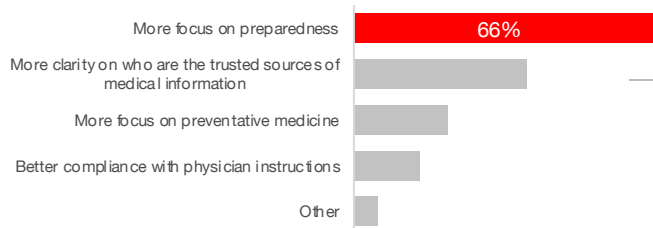
Q4
What will be the greatest lesson health systems should learn from the COVID-19 Crisis?

Interestingly, physicians place the greatest value on lessons learned around supply chain management over those related to crisis management.

Properly equipping physicians is not only a fundamental requirement for everyday care, but also an essential area that requires proactive planning in order to prepare for a future crisis.

Preparedness will be the main focus for improvements over others such as prevention, information and instruction.

Majority of the physicians think there will be more focus on preparedness as a result of COVID-19



Q5
How will the world of healthcare be different in the future as a result of COVID-19?

This focus on preparedness provides an opportunity to create transformation beyond the tangibles of inventory and supply management to include intangibles – such as confidence and certainty.

The implication for health systems is that moving forward, they should consider prioritizing activities that help to address the emotional side of preparedness amongst their physicians.

Key takeaways

01.

Preparedness means more than supplies

When we think about supplies and inventory we think about white boxes and closets full of equipment. Historically, it's not as sexy as innovation or cool science, which typically grabs headlines in healthcare. COVID-19 has taught us to pay more attention to the supply chain and the people who are on the front lines using it. At the end of the day, care can't happen without gloves, equipment, tests and medicine. But it's also taught us that the tools necessary to do the job of care go beyond physical supplies.

02.

Health systems must focus on putting systems and operations in place that give physicians both the physical as well as the emotional tools they need to do their job to the best of their abilities. For example, it means ensuring that they have enough PPE and gloves, but it also means ensuring that they have the correct information to feel safe, secure and supported. Information, guidance and communication are only half of the picture, they also need to feel certain that what they've got is timely, comprehensive and credible.

Moving into a post-COVID world, all health companies will be looking to apply learnings from the crisis to transform and improve how they conduct business. One of the biggest lessons, but perhaps toughest to solve because it is complex, is transforming the feeling of preparedness that ultimately comes from much more than supplies or equipment alone.

In today's interconnected healthcare ecosystem, any product, service or offering has the potential to become mission-critical.

The imperative for all healthcare brands is to be prepared for that moment by clarifying their role and offering to every stakeholder. We hope these findings can lead to new thinking and responses that help us all get to a new place that is better equipped not only to handle a future crisis but also the healthcare needs of today.

In healthcare and diagnostics, brand matters

Brands in the era of pandemic-driven change

Contributors:
Craig Konieczko
Strategy Director;
Steven Lee
Analytics Director

This week we delve into understanding, from a physician's perspective, of the role of diagnostics in this era of crisis-driven change.

Every part of the health care continuum matters. Know your brand's place and role within it.

We understand that these are challenging times for all brand leaders, and so please know we're here to help you navigate. We hope that these findings can lead to new thinking and responses that help us all get to a safe and speedy resolution.

We'll never take any part of healthcare for granted again.

Before Covid-19...

Did you have any idea what PPE means?

Did you think even once about the health care supply chain?

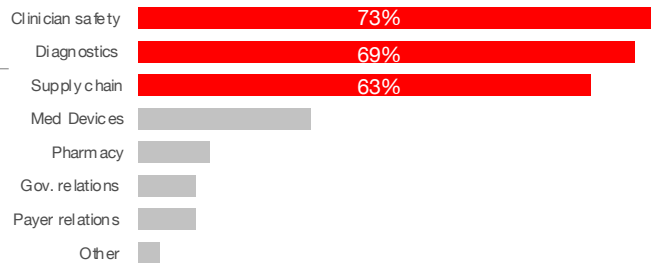
Did you imagine how much governments would depend on diagnostic testing to slow the spread of a global epidemic?

Now we all have a far greater sense of our dependence on even the "smallest" parts of healthcare to fulfill the greatest roles.

Q1
What is the most important area of focus for the health system?

Data points

Healthcare is interconnected, so all parts matter.



In the context of the Covid-19 crisis, doctors on the front lines said that the most important areas of focus have been personal protective equipment (PPE), diagnostic testing, and supply chain.

They also told us that they felt unprepared because maintaining adequate supplies in these areas were challenges for their health systems.

76%

say **diagnostics** has been **a top challenge** at this point in the Covid-19 crisis

At any moment, any healthcare brand has the potential to become mission-critical. No part of the supply chain may allow itself to go overlooked.

Even healthcare basics have the potential to halt global epidemics.

Diagnostic testing was one aspect of US healthcare that may have been viewed as a commodity until now.

But since Covid-19, we've learned that physicians can't effectively treat what they can't measure. They know what they need to be effective and told us how to make sure they are equipped moving forward.

"There is a slow turnaround time for testing which means a lack of guidelines on how to test more patients."

- **Infectious Disease**

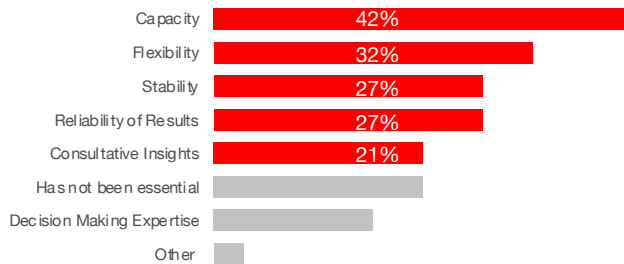
"We need a reliable rapid home test, and more remote access to results."

- **Pulmonologist**

Q2
What attributes of Diagnostics are most important in the fight against Covid-19?

Data points

Diagnostics brands deliver a range of benefits beyond test results



Post Covid-19, all diagnostics brands will have an even greater obligation to use language that guides payers, hospitals, regulators and the general public to understand the full value of their innovations, services and solutions.

Key takeaways

01.

Some things we take for granted in healthcare are the most important

It's easy to take PPE, devices, supply chain, and diagnostics for granted. But now it's clear that upstream investments yield downstream payoffs: Physicians say that better results would have led to improved safety, better triage, and less waiting time. Framed this way, compromises are no longer tenable. Once we have moved beyond this crisis, itemize the true costs of not having focused enough on key healthcare functions so the right investments can be made.

02.

Physicians excel when they know what they're caring for

Providers sometimes work in silos, so a breakthrough move for healthcare brands that also tend to get 'niched' will remind all stakeholders of the critical role they play as partners to physicians. Make connections across the continuum of care – and by association, assert your role to any health system's overall success. In this way, your brand messaging can resonate on an emotional level to complement the functional business case.

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