



HOT HEALTHCARE TREND FOR 2020-21: THE DIGITAL FRONT DOOR

By Mark Boudreau, *Healthfully*, Chief Operating Officer

The Digital Front Door is a hot topic within the industry and media these days. Much of the discussion is in reaction to COVID-19 and the importance of social distancing. However, before COVID-19, the Digital Front Door was already being considered as a key corporate imperative to being competitive and relevant in healthcare today. Given the growing regulatory support for offering digital healthcare services, the Digital Front Door will certainly remain a hot trend throughout 2020 -- and well beyond into 2021!

WHAT IS THE DIGITAL FRONT DOOR FOR HEALTHCARE?

The Digital Front Door is a strategy for engaging patients at the start of their health and wellness journey (and often throughout) using technology that patients have already adopted.

BATTLE FOR HEALTHCARE'S DIGITAL FRONT DOOR

Tech giants, industry behemoths, and niche providers seek to disintermediate legacy organizations by offering more convenient and frictionless access to healthcare services. Examples include:

- **Amazon Care.** Formed by Amazon.com, Berkshire Hathaway and JP Morgan Chase. First launched for Amazon employees in Seattle. Healthcare providers are available through video, chat, and in person house calls; also includes prescription delivery to home. Massive customer base.
- **CVS/Aetna Health Hub.** Reformatted drugstores into Health Hubs that look and operate similar to a doctor's office, with broad health and wellness services. Includes newly acquired Aetna health plans. Massive increase in annual revenue growth from 5% to 25%.
- **Walmart Health.** Recently launched 10,000 square-foot super center to provide basic healthcare services. Provides an array of primary medical services, dental care and behavioral health services. Established relationships with select providers.

Today, established health systems are competing with each other, as well as with many new entrants. Business models that excel at capturing the patient at the "front door" to healthcare, have a much greater chance at influencing downstream patient service decisions. Health systems are looking to enhance consumers' ease and convenience in accessing healthcare services (i.e. reduce friction) - or they risk becoming a downstream cost center.



A DIGITAL FRONT DOOR THAT GOES SOMEWHERE

Many health organizations have chosen faster inorganic growth strategies to get larger and more diverse. This has included acquisitions, joint ventures, affiliations, subsidiaries, and partnerships. As a result, health systems in general have many disparate care settings, as well as consumer apps and portals that are often confusing and frustrating for consumers.



Many health systems have launched branding exercises in an effort to expand care settings as a band-aid approach to providing a uniform service. Unfortunately, many underlying interoperability challenges continue to exist with this approach, resulting in an inconsistent brand experience. In response, others have implemented customer service programs at every major touchpoint of the patient journey; however, this focus becomes meaningless if patients encounter cascading issues, handoffs, and friction at subsequent points of their journey across disparate care settings.

As a result, health systems are increasingly searching for a Digital Front Door solution that engages the consumer and provides a seamless, unifying consumer experience across their digital and physical services.

CONSUMER DIGITAL EXPECTATIONS

Amazon.com and other leading digital consumer experiences have set the bar high for what consumers expect from digital health services. The Digital Health Collaborative and other consumer associations and advocates have long documented consumer digital health expectations. They include:

- On-demand, convenient health services (e.g. for those who want to be in control and don't want to wait);
- Simple, yet information-rich, and empowering;
- More engaging and context-aware interaction, when required;
- Holistic - seamless interoperability - seen as "one health system";
- Leverages social, communities, gamification, incentives, and rewards to help consumers "feel good" about their engagement and record a better consumer experience.



DIGITAL CONSUMER EXPERIENCE – A COMPETITIVE DIFFERENTIATOR FOR HEALTH SYSTEMS?

In general, it is difficult for health systems to differentiate from each other based on price or quality. The overall patient experience with health systems is relatively poor, providing ample opportunity for differentiation. More specifically, many consumers invest their loyalty based on experience -- and some convenient experiences can only be addressed through digital solutions. For the enterprise, this also has the added benefit of generating new revenue streams, additional digital access points, all at a lower cost of care -- while providing a better overall patient experience.

DIGITAL FRONT DOOR AT FLAGLER HEALTH+

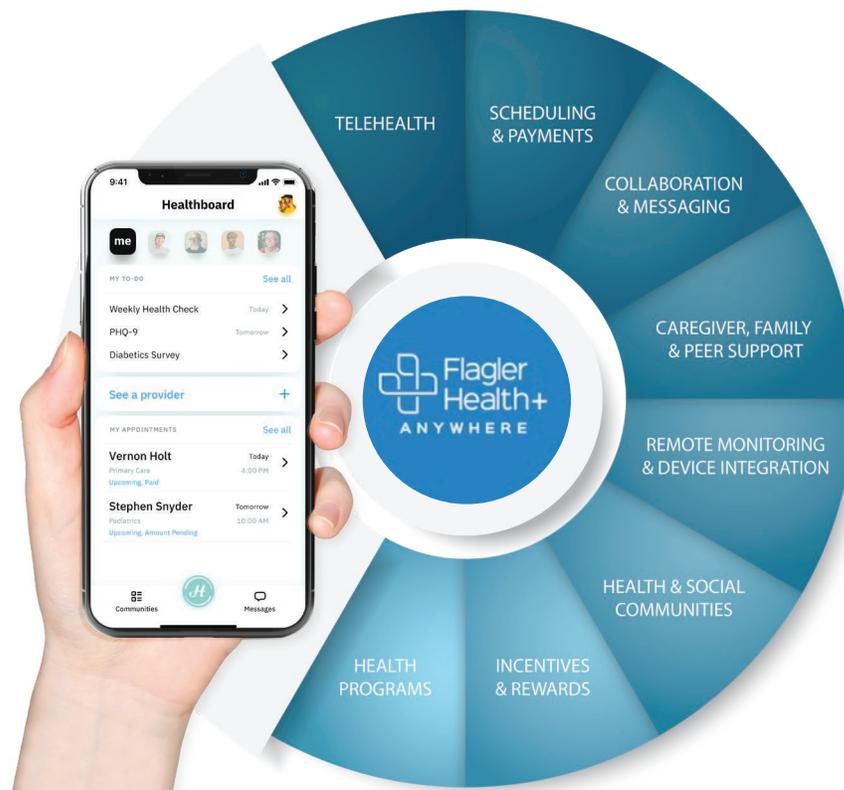
Flagler Health+, a health system in St Augustine Florida, recently deployed their consumer engagement platform, branded as the Flagler Health Anywhere App. This solution is deployed across wide range of care settings including: primary care, pediatrics, urgent care, orthopedics, surgical specialist, lab and diagnostic imaging, social and community services, and mental health. It provides a single Digital Front Door to access care across both digital and physical channels.

The solution was also deployed across different organization types, including their subsidiaries, partners, joint ventures, and affiliates. From this perspective it also:

- Establishes a consistent Flagler Health patient experience across care settings
- Maintains a direct relationship with patients across partners
- Creates stronger partner relationships and dependencies
- Establishes opportunities for increase referrals and patient uptake from partners

Flagler Health+ has added some new digital services that also offer additional revenue streams. For example, Flagler Health+ offers a complete digital COVID screening and exposure management program for employers within and beyond their traditional service geography.

The timing for the launch of Flagler Health+ was fortuitous during these challenging times: they deployed their digital consumer platform and alternative revenue



streams just as they were forced to close elective surgeries and other non-essential in-office services due to COVID-19.

The Flagler Health+ solution takes a very consumer-oriented approach to the Digital Front Door. Rather than trying to extend clinical systems and modify their user experience for consumers, Flagler Health+ started with an innovative consumer platform and integrated it into its clinical and administrative systems, thereby providing a consistent user experience desired by consumers. Built and deployed in less than a year, the Flagler Health+ Digital Front Door is effective, affordable, sustainable, and achieves their strategic goals. Flagler Health+ will be a strong digital consumer health player moving forward.

The Flagler Health+ case example is yet another reason why the Digital Front Door will remain a hot trend for 2020-21.

References

2019 State of Consumerism in Healthcare, KaufmanHall, 2019
Wheel Image courtesy of Flagler Health+ www.flaglerhealth.org.



Mark Boudreau

Healthfully, Chief Operating Officer

Co-founder Mark Boudreau is the COO of Healthfully and brings more than 30 years of success across the technology, product and service, and healthcare industries. Mark previously served as a partner at Accenture and Vice President of Strategy at Orion Health.