

# Trends Effecting Florida's Healthcare Providers

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# With you Today



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Based in St Petersburg Florida, Alex Obenauf is a managing director in KPMG's healthcare advisory practice serving large healthcare organizations remove friction from the patient experience across the care continuum. He drives significant improvement for clients through enabling new technologies, leveraging digital tools, deploying advanced analytics and implementing leading practices. .



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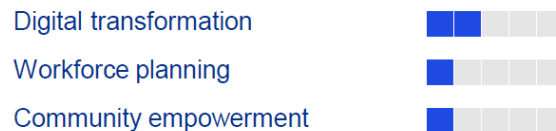


# The question is not whether we need to transform healthcare, but how healthcare will be transformed



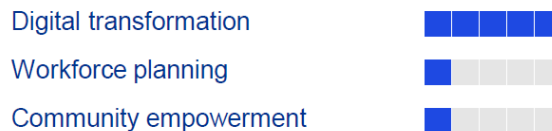
## Impoverished

- The result of a continued reliance upon an outdated model of care delivery.
- Emphasises the need for investment in traditional areas:
  - Workforce – but without addressing retention, burnout or care models.
  - Building new hospitals – but without shifting care in primary and community settings or increasing the workforce.
  - Technology – but without fundamentally changing models of care delivery.



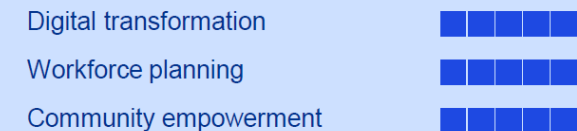
## Alienated

- The result of an overreliance of digital and technological solutions.
- Likely to be dominated by 'big tech'. They are well-placed to utilise huge quantities of data, have the necessary capital to develop market-leading platforms, and already have a vast customer-base.
- A two-tier system in which those with digital literacy and wealth will receive the highest quality service.
- Focused on *health*, not on *care*.

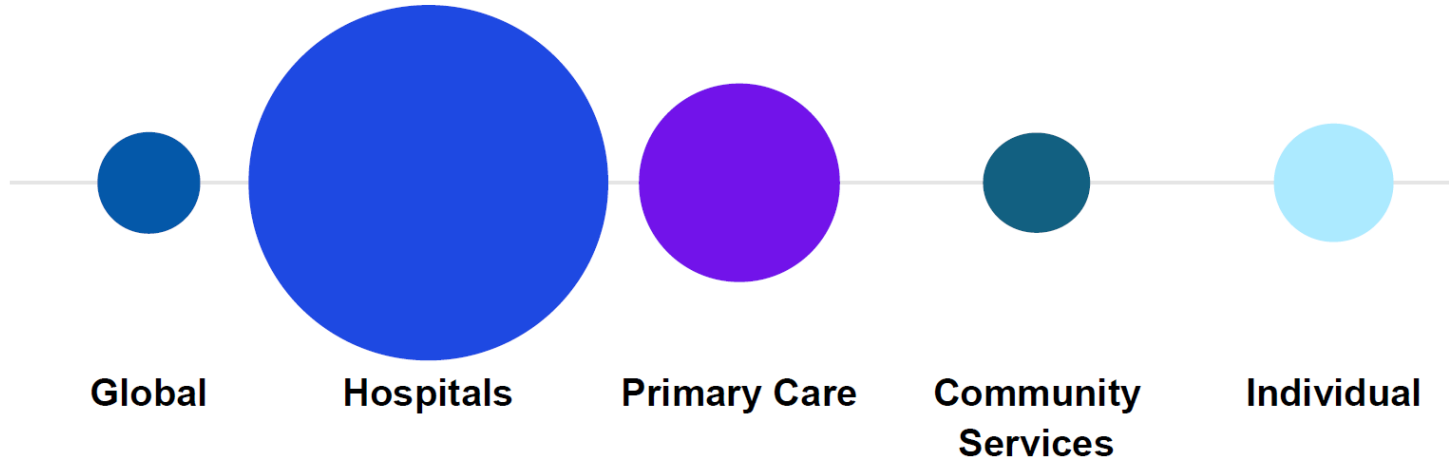


## Inclusive

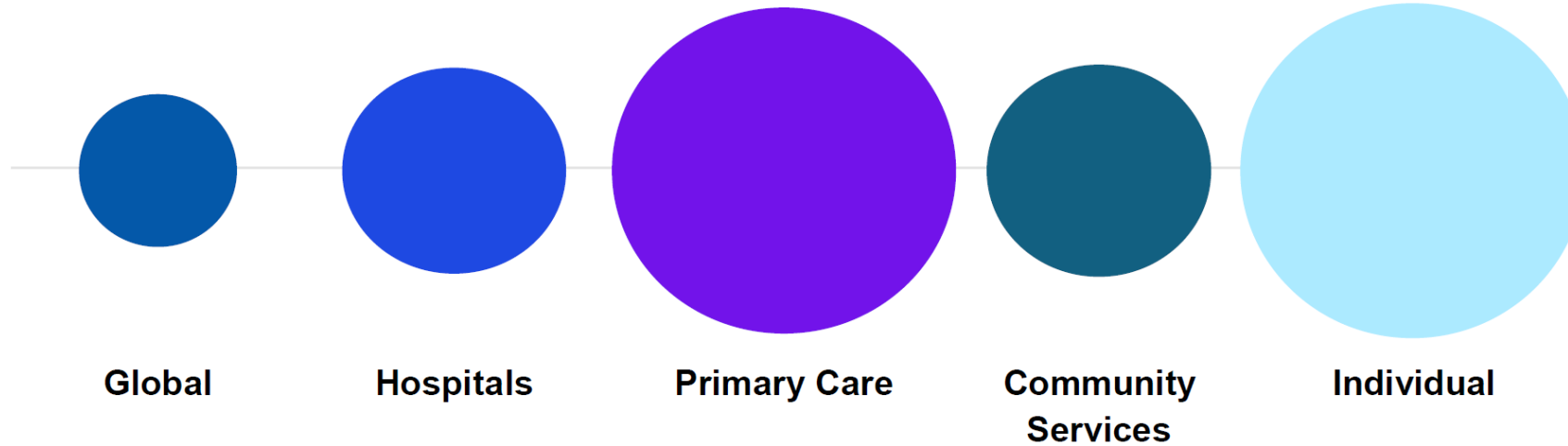
- The result of utilising technology and community assets to enable the workforce to provide high quality-care.
- Characterised by effective public-private partnerships, such as utilising the agility of start-ups to support digital transformation.
- An empowered workforce, with tech solutions enabling them to focus on providing care.
- Individuals and their communities are empowered to prevent ill health and intervene earlier.



# The healthcare ecosystem now...



... and 10 years from now



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# The Generational Divide

“Meet me where I am in my life – right time, right care, right place.”

**Generation Alpha**  
(0-10) 39M



**Millennials**  
(27-42) 72M



**Generation X**  
(43-58) 65M



**Boomers**  
(51-77) 69M

**Silent Generation**  
(78-95) 19M



<b>Life Events</b>	Birth – College	First job, starting families	Supporting children and aging parents- 47% have both	Retired. 41% of 55-64 households have \$0 saved for retirement
<b>Health needs</b>	Pre-healthcare, well care/growth and development, and/or as needed	Wellness focused, figuring out how to be a healthcare consumer	Healthcare consumers and beginning preventative care	Chronic care and/or longer-term care
<b>Preferences</b>	May be the 1 <sup>st</sup> generation to use virtual care on a regular basis	Trust retail and telemedicine over traditional healthcare systems	Technology savvy, open to change and price sensitive	Typically aligned to traditional model. Often care is coordinated through others.
<b>Financial model/impact</b>	Parental support	Employer supported and/or out-of-pocket	Employer supported and/or out-of-pocket	Medicare and/or out-of-pocket
<i>Top-of-mind healthcare programs</i>	Virtual care	Retail/virtual care	Connected care	Chronic disease management
	Screening	Wearables	Wearables	Symptom monitoring tools
	Minor chronic care, e.g., allergies, asthma	Wellness programs	Wellness and prevention	Home and long term care



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# Any patient experience-focused solution needs to account for the 6 pillars



## Integrity

*We deliver on our promises and consistently demonstrate our trustworthiness*

- ✓ Alignment of experience and expectations
- ✓ Pricing transparency
- ✓ Information accuracy
- ✓ Timely and accurate information for care



## Resolution

*When things go wrong we offer a sincere apology then act with urgency to resolve the issue*

- ✓ Proper policies / workflows to troubleshoot issues
- ✓ Clear escalation protocols
- ✓ Proactive identification of issues and customer outreach



## Expectations

*We effectively manage and then meet or exceed our patients' expectations*

- ✓ We do what we say we will do
- ✓ Agent understanding of pre-visit requirements
- ✓ Real-time information updates



## Time and Effort

*We strive continuously to make it quicker and easier to get access to care information and support*

- ✓ Provider Access
- ✓ Streamlined Communications
- ✓ Easy to navigate information portals / self-serve tools



## Personalization

*We understand our patients needs and will adapt their experiences to meet them*

- ✓ Personal Care Coordination
- ✓ Multi-channel access
- ✓ Patient Recognition
- ✓ Health coaches



## Empathy

*We put ourselves in our patients shoes then go the extra step because we understand how they feel*

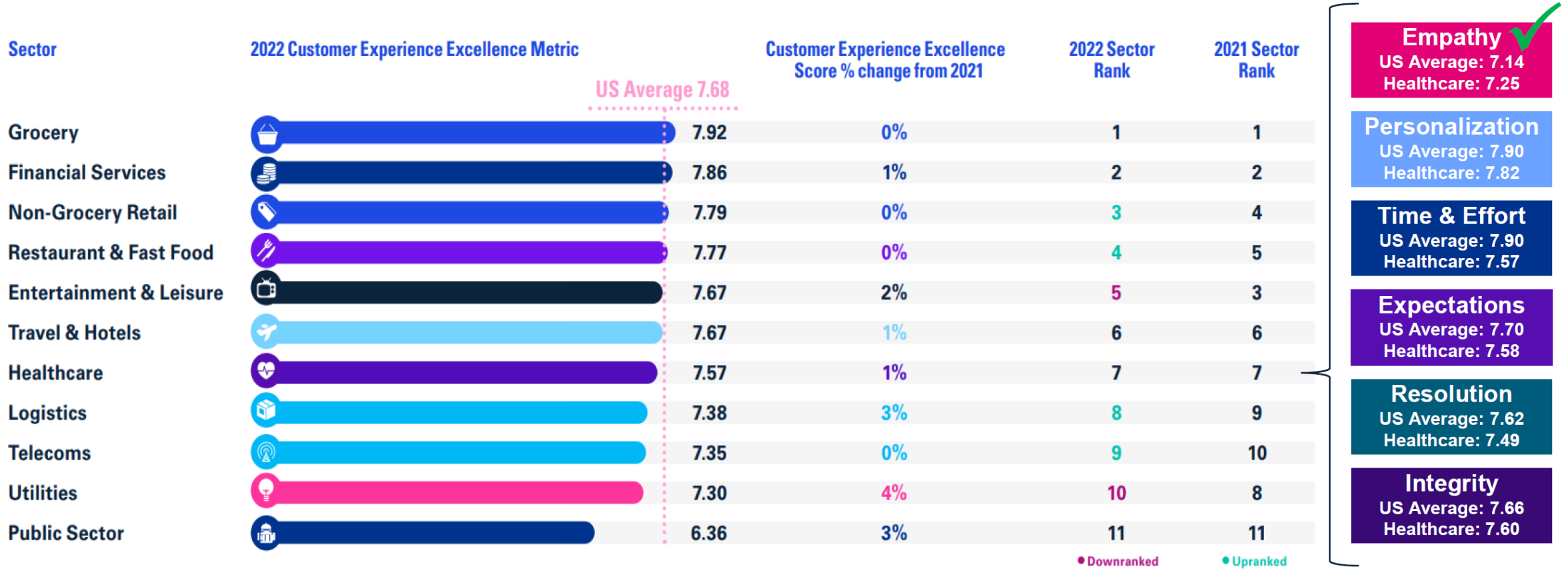
- ✓ Recognition of Human factors in interaction
- ✓ Financial counseling / understanding financial burden
- ✓ Patient with frustration

### Key Takeaways:

- It requires **discipline** and **sustained focus** across multiple areas that most large provider organizations have traditionally **let operate in silos** – or left to practice managers across dozens or even hundreds of locations
- KPMG's '6 pillar framework' can help Evernorth design a platform **based on experience expectations** defined through years of research
- The pillars are based on nearly a decade of cross-industry research spanning **2 million consumer evaluations in 14 countries**
- The exercise of aligning, prioritizing, and implementing specific initiatives to the pillars can be a useful way to ensure the organization remains focused on capabilities that will best **drive patient satisfaction and increase patient loyalty** to the system and its providers

# US Sector Performance

Survey ranks Individual companies using the Consumer Experience Excellence Score on a scale of 1-10.  
 This year 237 US Companies were included across 11 sectors and included interviews of over 7,700 customers  
 Rankings were across 3 main areas: Advocacy, Loyalty, and The 6 Pillars

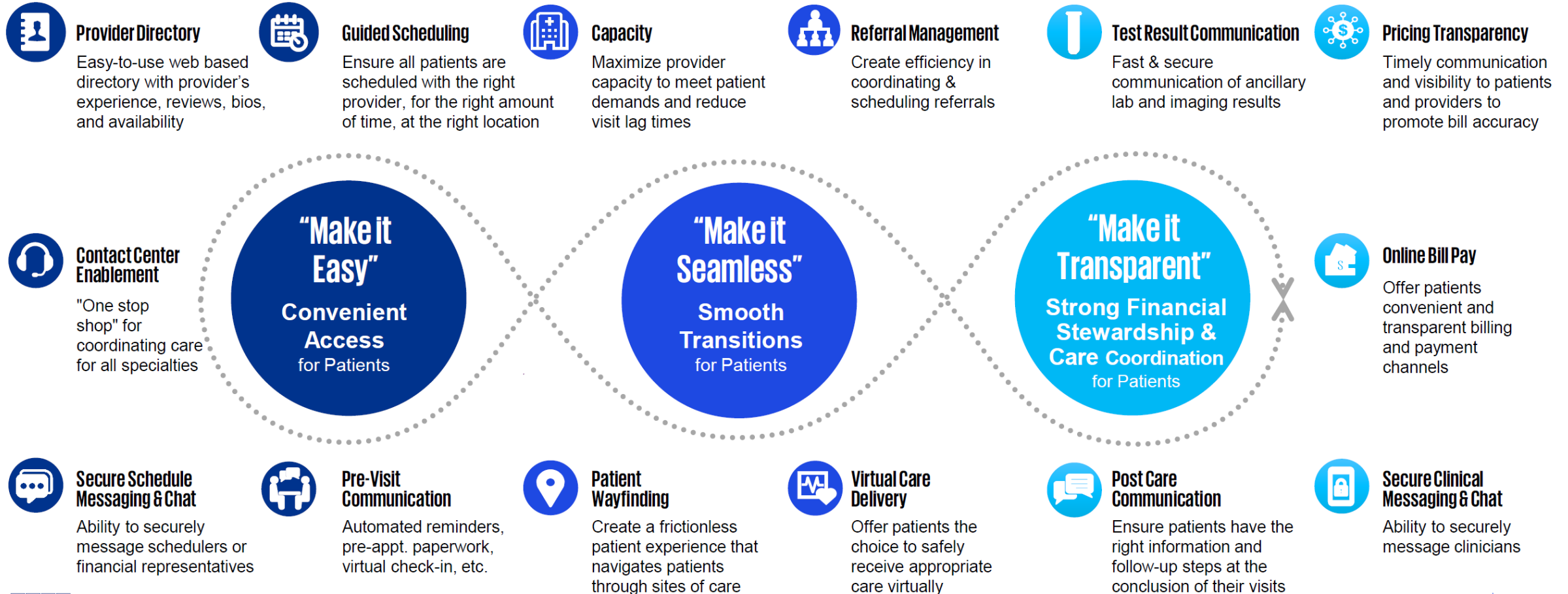


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# The Patient Experience needs to be an easy, seamless, and transparent process

## Seeking Care      Time of Service and Afterward      Navigating Payment and the Care Continuum



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