# Trends Effecting Florida's Healthcare Providers

**October 5th, 2023** 



## 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.



# Let's start with a quick view on macro level challenges...

We are approaching a tipping point for change in the healthcare industry.
While other industries have experienced greater transformations to date, a combination of disruptive forces is driving this in healthcare including:



**Cost** – Healthcare is no longer "recession proof". Continuously rising costs are applying continued pressure on healthcare systems, as well as on payers and other convergence employers.

Demographic Shifts, Access to Care, SDOH and Post-Covid Impacts – increasing expectations for lower cost and convenience on the one hand and for more integrated chronic care on the other. Covid exposed a real disparity.

**Consumerism** – Patients as consumers, and their expectations, will continue to grow in importance through demands for more convenient experiences that are integrated with the rest of their daily lives.

**People/Labor/The Future of Work** – we focus heavily on the Patient, but the Caregiver is in a crisis mode. How can we make their lives easier, reduce stress, retain quality employees and improve patient care all at the same time?

**Growth, Scale, New entrants & Convergence** – In the face of the above challenges, new technology startups, as well as large players from other industries, are entering the healthcare space.

**Regulatory** – Compliance implications for price transparency, security and privacy, payment reform, federal and state regulations, and ESG.

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



- The result of a continued reliance upon an outdated model of care delivery.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.

Digital transformation

Workforce planning

Community empowerment





#### **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 marketleading 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.

Digital transformation

Workforce planning

Community empowerment





#### **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.

Digital transformation

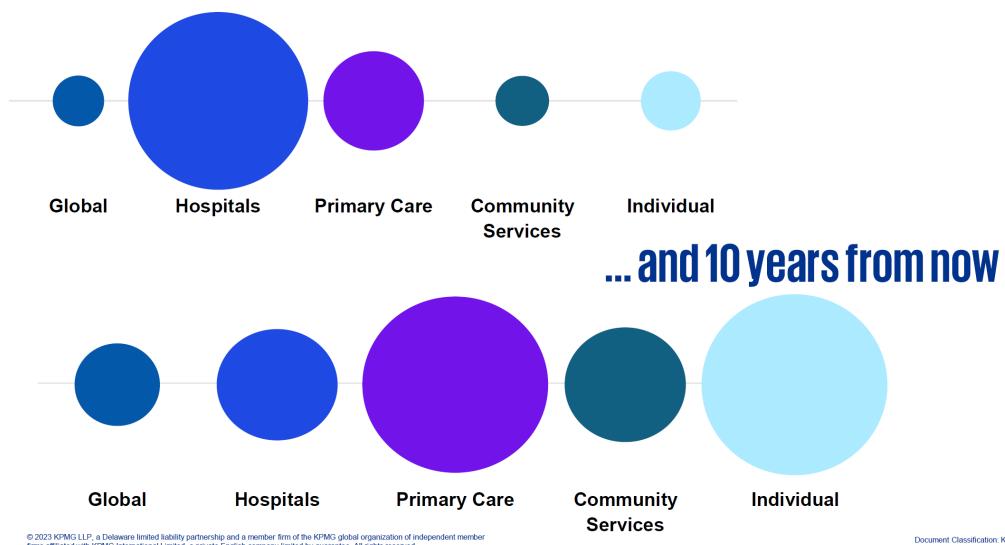
Workforce planning

Community empowerment





# The healthcare ecosystem 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 Generation Z (10-26) 69M

Millennials (27-42) 72M



Generation X (43-58) 65M Boomers (51-77) 69M Silent Generation (78-95) 19M



Life Events	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
Health needs	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
Preferences	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.
Financial model/impact	Parental support	Employer supported and/or out-of-pocket	Employer supported and/or out- of-pocket	Medicare and/or out-of- pocket
Top-of-mind healthcare programs	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

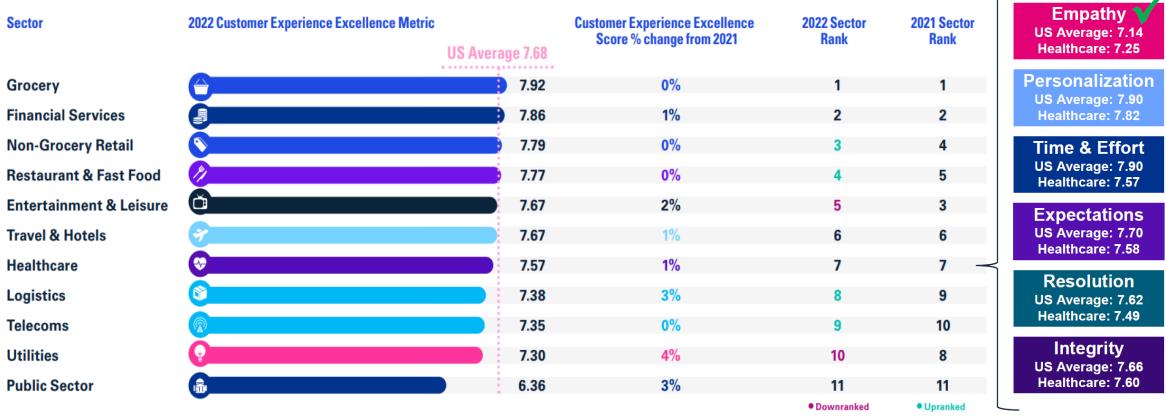


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## **US Sector Performance**

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



#### **Provider Directory**

Easy-to-use web based directory with provider's experience, reviews, bios, and availability



#### **Guided Scheduling**

Ensure all patients are scheduled with the right provider, for the right amount of time, at the right location



#### Capacity

Maximize provider capacity to meet patient demands and reduce visit lag times



#### **Referral Management**

Create efficiency in coordinating & scheduling referrals



#### **Test Result Communication**

Fast & secure communication of ancillary lab and imaging results



#### **Pricing Transparency**

Timely communication and visibility to patients and providers to promote bill accuracy



#### Contact Center Enablement

"One stop shop" for coordinating care for all specialties

#### Make it Easy"

Convenient
Access
for Patients

#### "Make it Seamless"

Smooth Transitions for Patients

#### "Make it Transparent"

Strong Financial Stewardship & Care Coordination for Patients



#### Online Bill Pay

Offer patients convenient and transparent billing and payment channels



#### Secure Schedule Messaging & Chat

Ability to securely message schedulers or financial representatives



#### Pre-Visit Communication

Automated reminders, pre-appt. paperwork, virtual check-in, etc.



#### Patient Wayfinding

Create a frictionless patient experience that navigates patients through sites of care



#### Virtual Care Delivery

Offer patients the choice to safely receive appropriate care virtually



#### Post Care Communication

Ensure patients have the right information and follow-up steps at the conclusion of their visits



#### Secure Clinical Messaging & Chat

Ability to securely message clinicians



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Data Makes the Difference.

