



WHO MOVED MY PATIENT?

Current and Future Practices in Virtual Medicine

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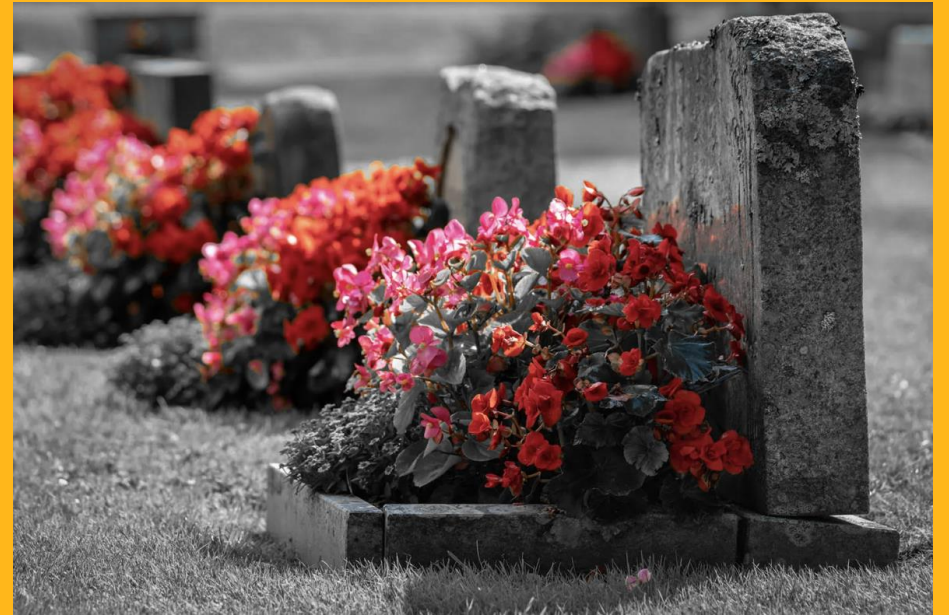
My Journey



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"Womb to Tomb"



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Why is change necessary?

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Market Relevance

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U.S. DIGITAL HEALTH FUNDING AND DEAL SIZE

2012-H1 2022

ROCK
HEAL+H



Note: Includes U.S. deals >\$2M; data through June 30, 2022
Source: Rock Health Digital Health Venture Funding Database

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Power Consolidation

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Vertical Integration

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Large Payer: Vertical Integration

Insurer	 UnitedHealthcare			
PBM	 OPTUMRx [®]			
Pharmacy	 briova _{Rx} [®]			
Provider	 OPTUMCare [™]		 	

 Baylor Scott & White HEALTH

Consumerism

amazon

Pill
Pack

 TELADOC®

one medical

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Staffing and Burnout

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PHYSICIANS



- Over the past year, nearly half (46%) of physicians considered leaving their current role to work for a new healthcare employer, and 43% considered early retirement.
- Most physicians (62%) cite their burnout is being caused by their current employer, and only 25% attributed their burnout to COVID-19 pandemic stress

MGMA 2021 Data

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NURSING



- 34% of nurses say it's very likely that they will leave their roles by the end of 2022
- 44% cited burnout and a high-stress environment as the reason for their desire to leave

REASONS

- Higher pay
- Search for a different role
- Improved schedule
- Preferred location
- Career advancement or training opportunities
- Better staffing overall

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MEDICAL GROUP TRANSFORMATION

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NT + OO = COO

NT + OO = COO

**NEW
TECHNOLOGY**

**OLD
ORGANIZATION**

**COSTLY OLD
ORGANIZATION**

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EXECUTIVE AND BUSINESS LEADERSHIP

TRANSFORMATION LEADERSHIP

FIND CARE

CUSTOMER
ACQUISITION

WEBSITE
OPTIMIZATION

ACCESS CARE

SCHEDULING

24/7 ACCESS

CONSUME CARE

ENHANCED CARE
TEAM

EXTENDED HOURS

NAVIGATE CARE

REFERRALS

PATIENT
NAVIGATION

PRACTICE
SIMPLIFICATION

CARE TEAM
EMPOWERMENT

PROVIDER
EMPOWERMENT





How does a healthcare system add or expand a virtual care option that their providers actually want to use??

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Classic system strategy:

- Cost
- Quality
- Patient Experience



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Classic system strategy:

- Cost
- Quality
- Patient Experience



Enhanced system strategy:

- Cost
- Quality
- Patient Experience
- Provider Experience



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System Goal:

Smooth adoption of
virtual care by providers



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Reality:

- Provider pushback
- Lack of engagement
- Slow adoption





What drives provider behavior?

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FAIR

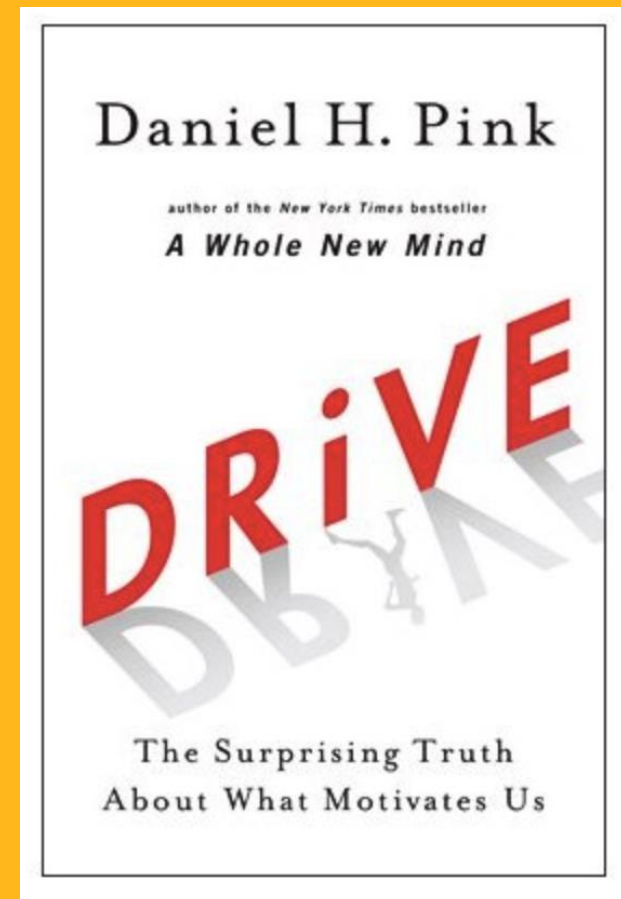
Compensation:

- Fair
- Incentivize the desired behavior



Key drivers for sustaining desired behavior:

- Autonomy
- Mastery
- Purpose



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Autonomy:

- Allow some degree of flexibility & customization
- Create “guardrails”
- What data will be tracked?



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Mastery:

- Coaching & training- new skill set
- Provider champions
- Provider feedback



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Purpose:

- Big picture- link to mission statement
- Patient stories & feedback
- Improved access to care



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Connection:

- Part of team- especially remote workers
- Celebrate victories
- Mentors



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Q&A

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