



Digitizing the Consumer Healthcare Journey

December 12, 2019

Agenda

- **Welcome & Introductions**
 - Claudia Ellison, *Director of Programs, eHealth Initiative*
- **Presentation:**
 - Aaron Martin, *Executive Vice President, Chief Digital Officer, Providence St. Josephs Health*
 - Graham Gardner, *Co-Founder and CEO, Kyruus*
- **Q&A**



SPEAKERS



Aaron Martin

*Executive Vice President, Chief
Digital Officer, Providence St.
Josephs Health*



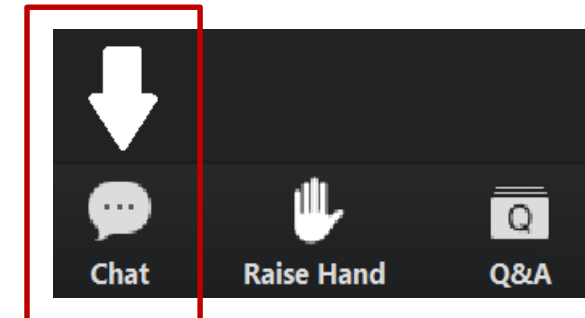
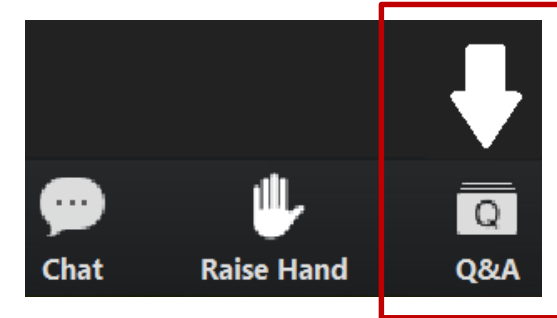
Graham Gardner

Co-Founder and CEO, Kyruus



Housekeeping

- **All participants are muted**
- **To ask a question to be answered by speakers:**
 - Use the “Q&A” box found on the bottom of your screen
 - We will address as many as possible after the presentations
- **For help with technical difficulties and non-speaker questions:**
 - Use the “chat” box and we will respond as soon as possible
- Slides and a recording of today’s presentation will be available for download on eHI’s Resource page: www.ehidc.org/resources



Our Mission

Convening executives from every stakeholder group in healthcare to discuss, identify and share best practices to transform the delivery of healthcare using technology and innovation.



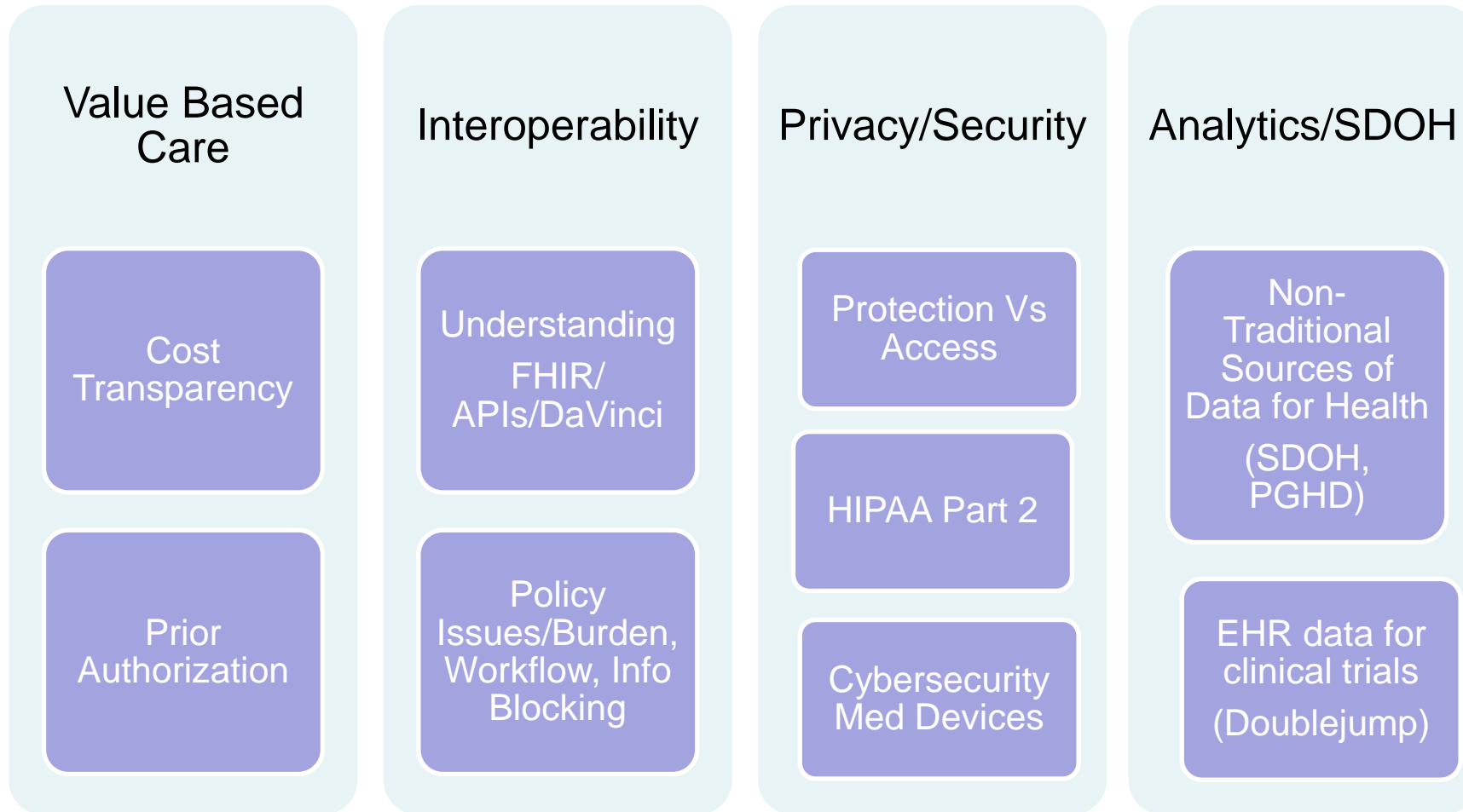
Our Members



**We thank eHealth Initiative member,
Providence St. Joseph Health, for their
commitment to us and their support of our
mission.**



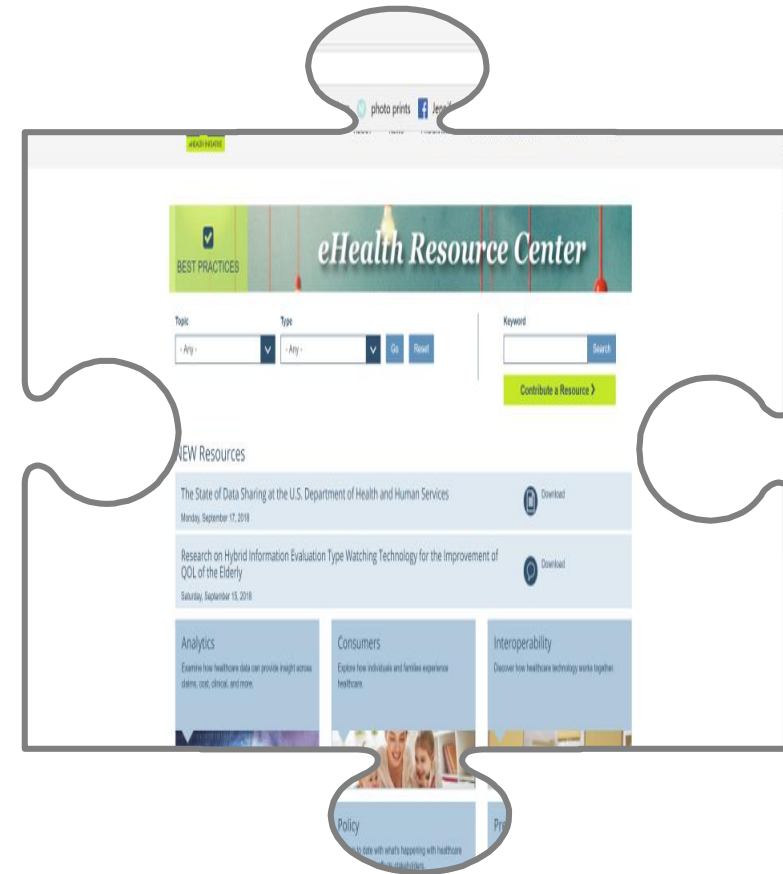
Current Areas of Focus



eHealth Resource Center

www.ehidc.org/resources

- eHealth Resource Center available with best practices & findings identifying and disseminating best practices
- Online Resource Center: Over 600 new pieces of content, 125 best practices added this year





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December 12, 2019

*Aaron Martin
EVP, Chief Digital Officer
Providence*

*Graham Gardner, MD
CEO & Co-Founder
Kyrus*

Commercially Insured Patients are in the Driver's Seat

- They fund the health system missions
- High deductible health plans have made them "Free Agents" (with plenty of choice)
- Demanding digital convenience and access – they are digitally enabled

REIMBURSEMENT TO COST

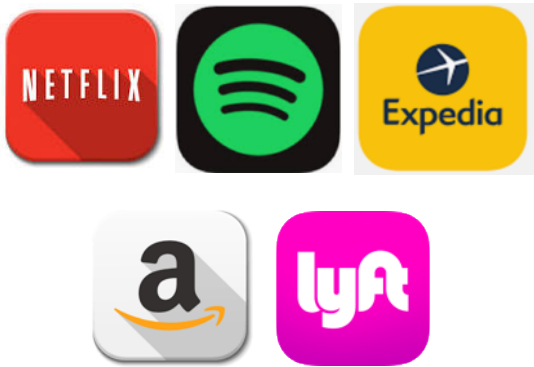
COMMERCIAL
140-150%

MEDICARE/MEDICAID
80-90%



Health Systems Aren't Keeping Pace

DIGITAL LIFE



CONSUMER EXPECTATIONS

ON-DEMAND

AFFORDABLE

TRANSPARENT

DIGITAL

HEALTH SYSTEM REALITY

Analog – phone, paper, fax

~30 Day PCP Wait Times

Opaque, complex pricing

Information silos

Fragmented care

Where Health Systems Fail, Others Quickly Fill the Gap

NEW PLAYERS ARE DISRUPTING INCUMBENT HEALTH CARE SYSTEMS

BIG TECH



*"Healthcare built
around you"*

Virtual (video, chat)
Mobile (office, home)
Rx Delivery

DISRUPTORS



*"On-demand, text-based
primary care"*

On-Demand PCP
Virtual (Chat)
24/7/365

RETAILERS



*"All in one place;
All on your schedule"*

Minor Injuries & Illness
Chronic Care
Wellness

3 (Basic) Ways Consumers Search for Health Care Online

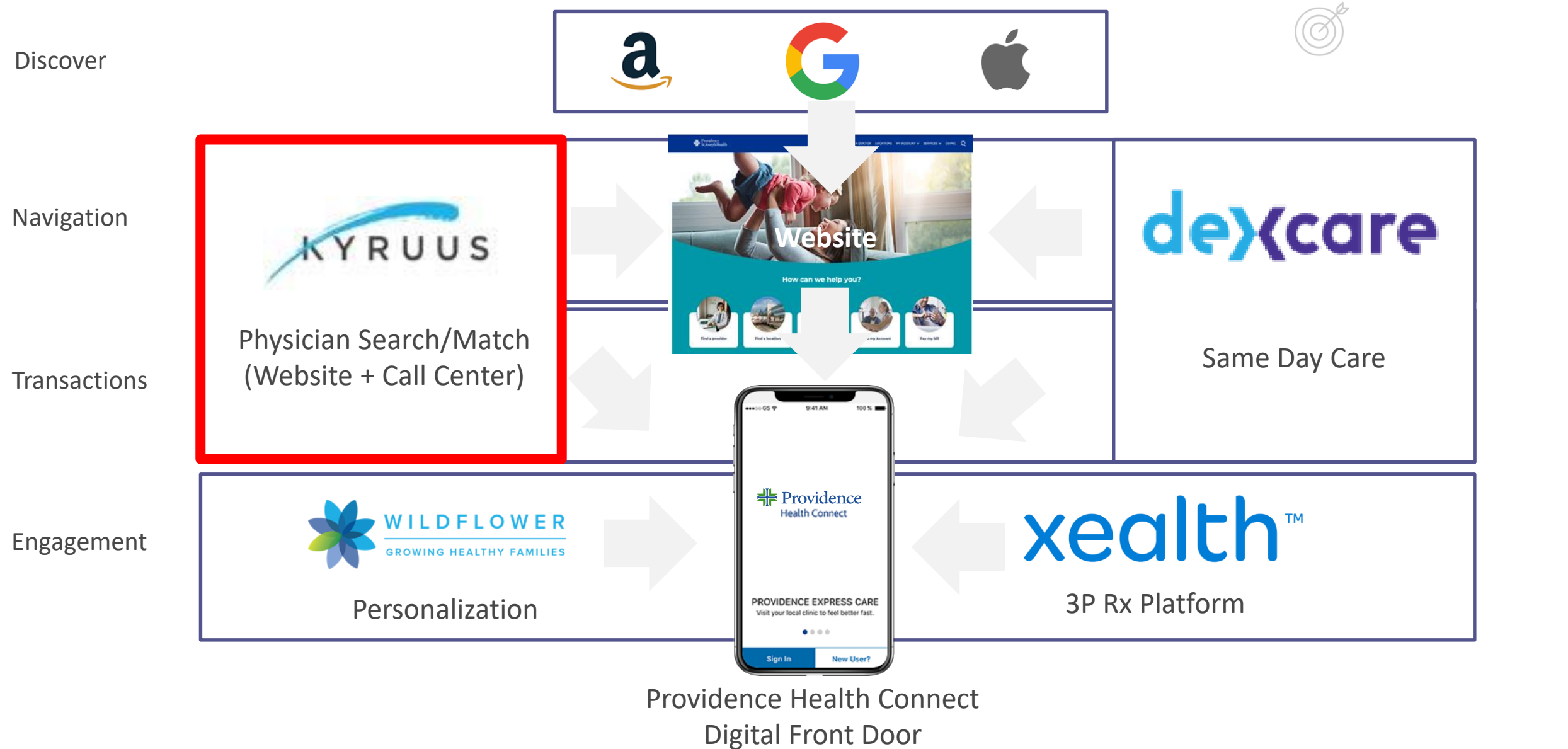
Research

- **Research a Condition:** Branded, Reliable, Personalized Content
 - Credible Clinical Content (Wildflower Health, Mayo Clinic, etc.)
 - Diagnosis Bots (Babylon, Buoy, etc.)

Ready to Transact

- **Find a Physician:** Need a PCP or referred to a Specialist
 - Insurance, Qualifications, Scope of Practice, Quality (rarely available)
- **Same Day Care:** Need something done with 12-24 hours
 - Trusted Brand, Location/Convenience, Scope of Practice

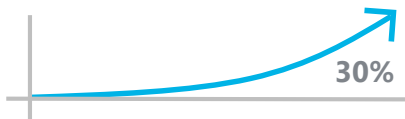
PROVIDENCE DIGITAL PLATFORM: DRIVING GROWTH



MULTIPLE FACTORS ARE DRIVING THE URGENCY TO IMPROVE ACCESS



Consumers demand the experience they have in other industries



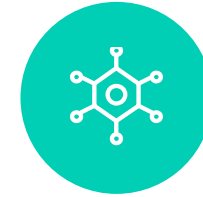
Appointment wait times in the United States have *increased* **30%** since 2014



Access points to health systems are multiplying, but often not integrated



55% of patients still book by phone, despite the prevalence of online research



Provider networks are rapidly evolving alongside a trend towards greater specialization



43% of providers lack insight into colleagues' clinical focus areas beyond specialty/subspecialty

CONSUMERS ARE WILLING TO SWITCH FOR A BETTER EXPERIENCE



Online Scheduling

Among consumers who prefer online booking, half would be willing to switch providers for the option



Quick Access

Four out of five consumers have previously had a booked appointment, but looked for another provider who could see them sooner



Convenient Care

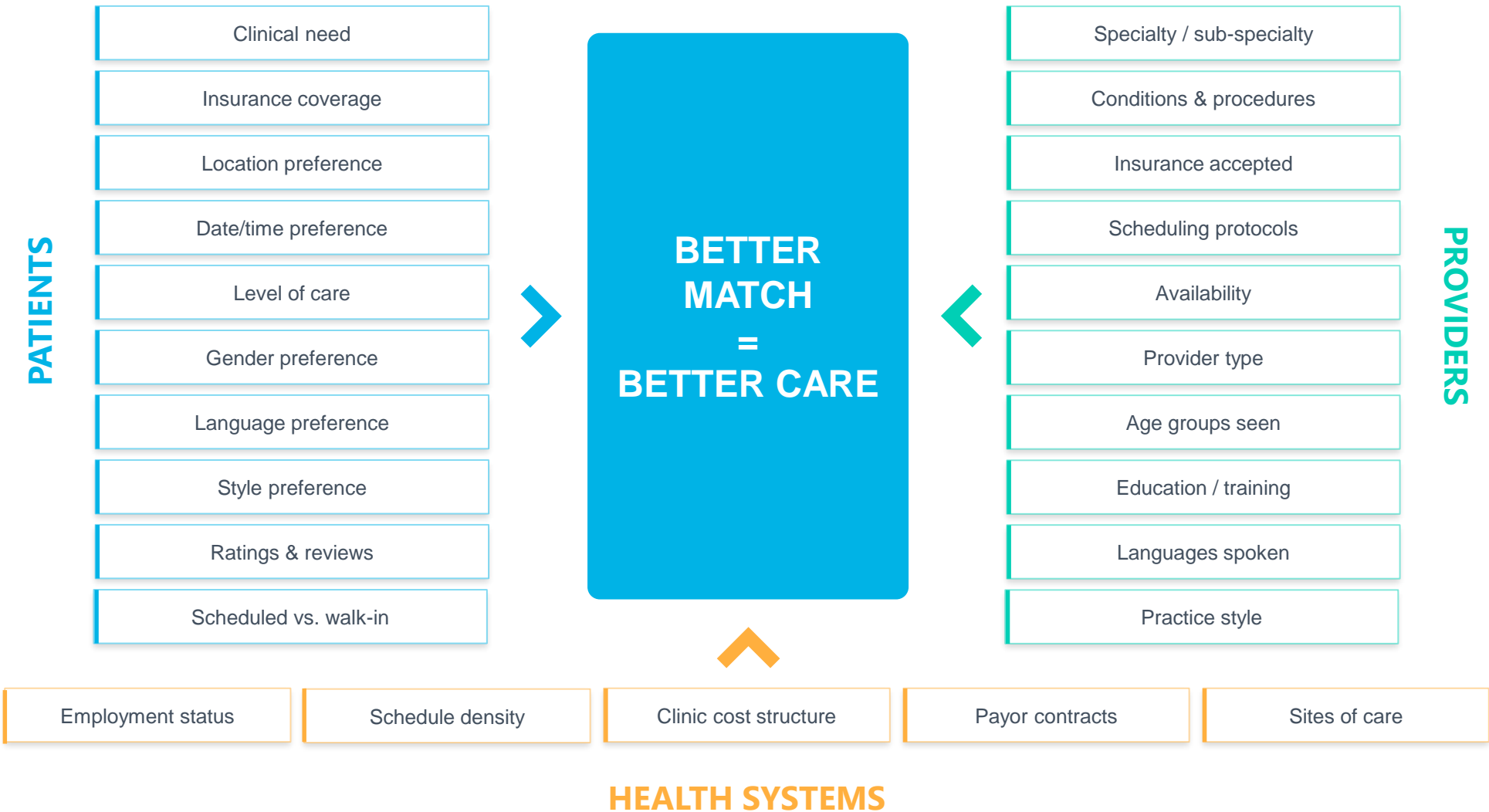
In addition to speed of access, convenience of location and hours are among the top drivers of urgent care and retail clinic utilization

RESOLVING DATA SILOES IS THE FIRST STEP IN ENABLING TRANSACTION READINESS

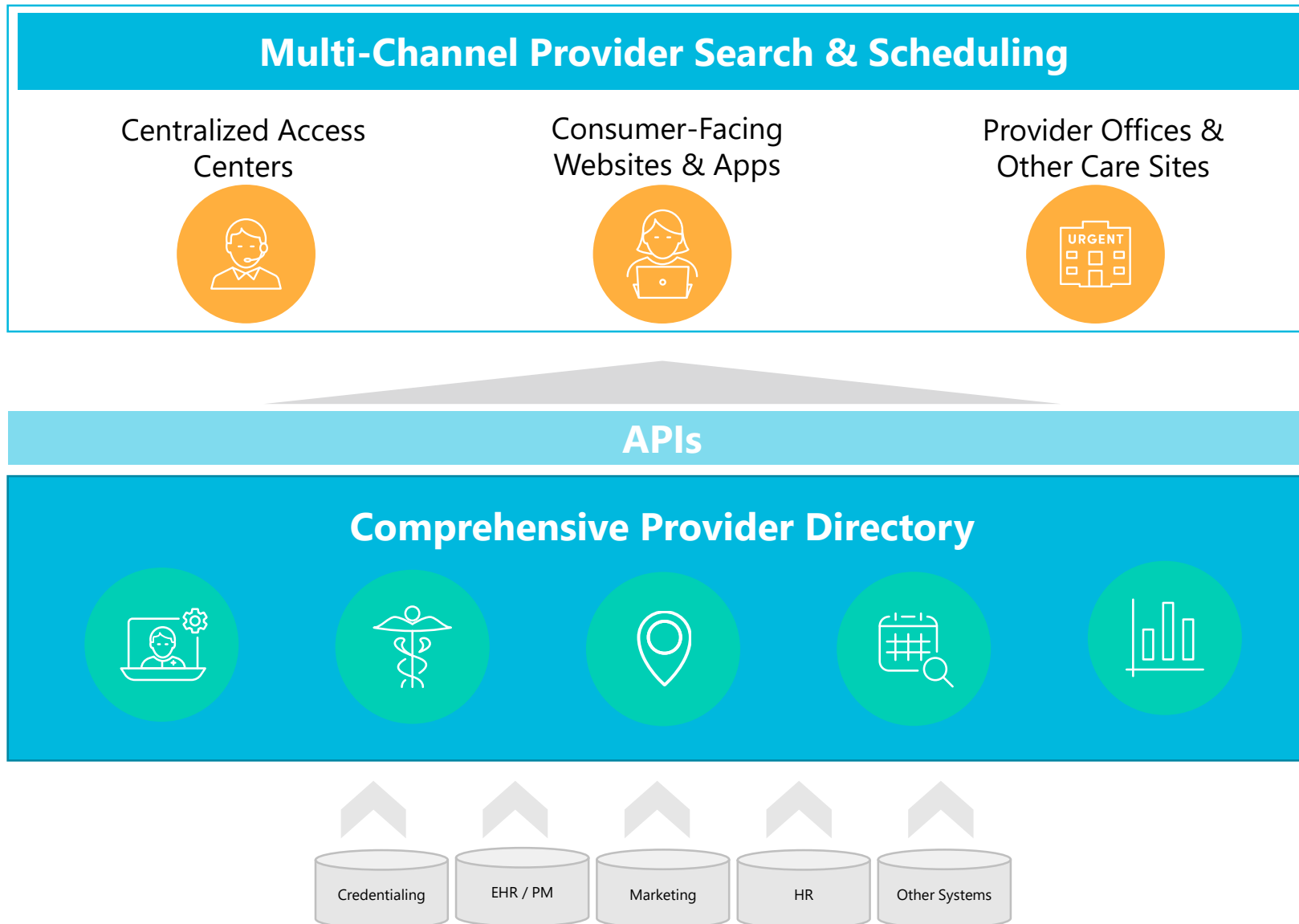


Transaction readiness needs to span both initial access and subsequent care transitions

TRANSACTION READINESS NEEDS TO ACCOUNT FOR THE COMPLEXITY OF PATIENT-PROVIDER MATCHING



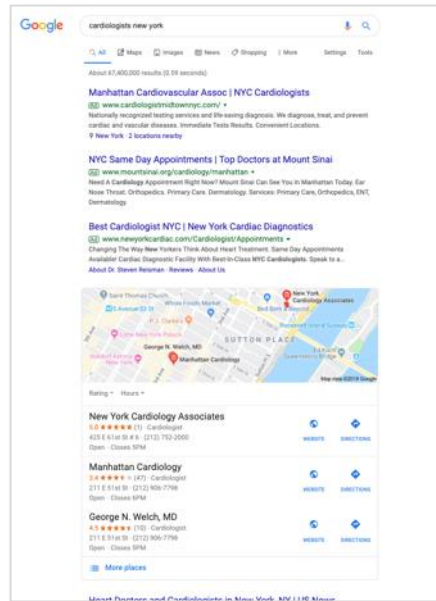
BETTER ACCESS STARTS WITH BETTER DATA – ACROSS ACCESS POINTS



WINNING ONLINE REQUIRES A DISCOVERABLE AND DIFFERENTIATED DIGITAL FRONT DOOR

Discover

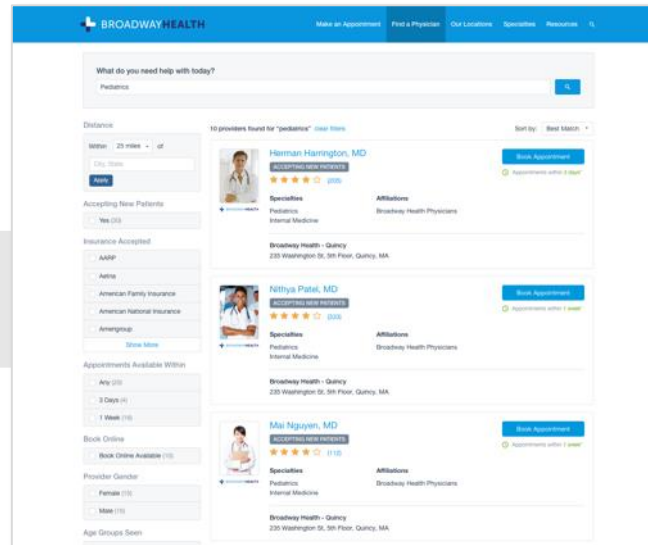
Stand out in general searches



- ✓ Search engine optimization
- ✓ Local listings management
- ✓ Third-party sites

Navigate

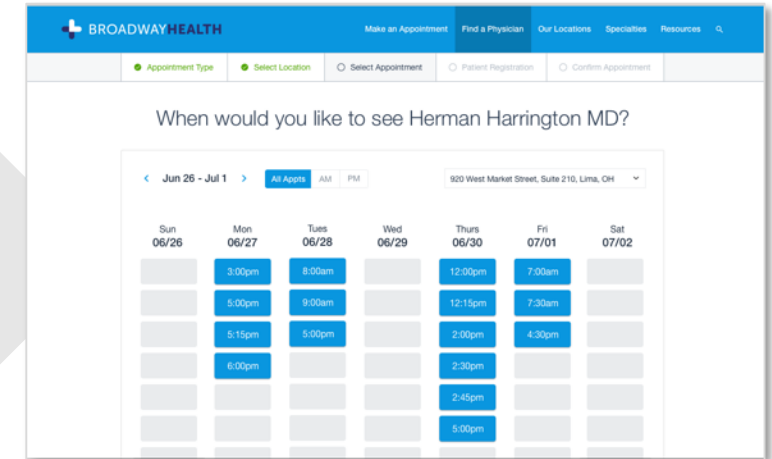
Help consumers find the right care



- ✓ Keyword-based search
- ✓ Dynamic sorting & filtering
- ✓ Robust provider profiles

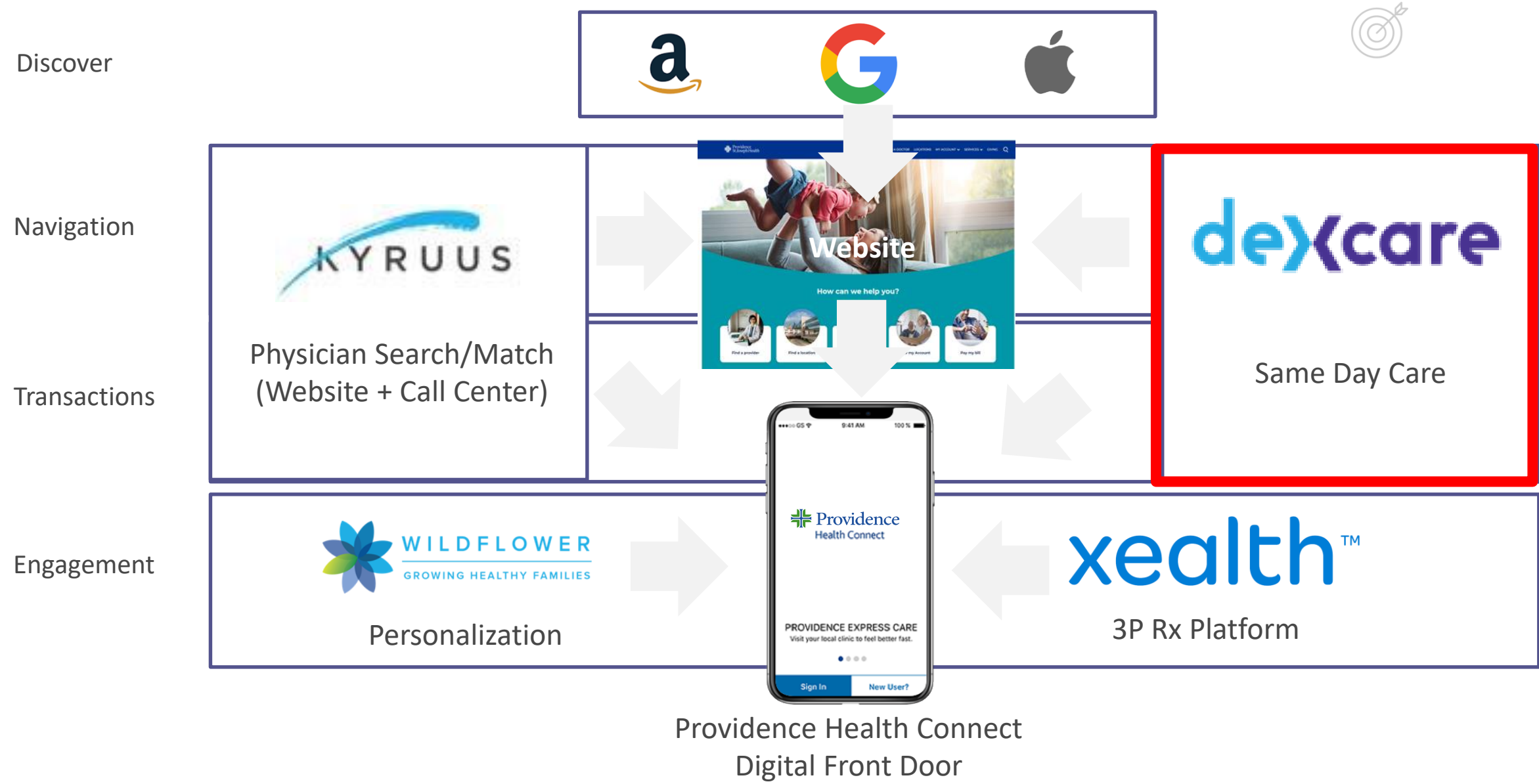
Transact

Make it easy to book with you



- ✓ Real-time appointment availability
- ✓ Seamless scheduling into EHRs
- ✓ Visible urgent, retail & virtual care options

PROVIDENCE DIGITAL PLATFORM: DRIVING GROWTH



Same Day Care Defined

ON-DEMAND ACCESS AND AVAILABILITY

DIGITAL SELF SERVICE



ALWAYS AVAILABLE



LOW, TRANSPARENT PRICE



ALL CARE OPTIONS



Stitching Together Point Solutions Doesn't Work

HARD LESSONS LEARNED BY PROVIDENCE THROUGH THEIR SAME DAY JOURNEY



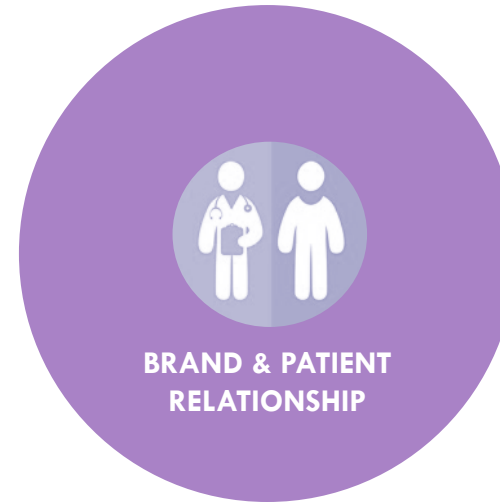
POOR UX

Multiple Vendors
Multiple Implementations
Fragmented User Experience



DOESN'T SUPPORT

Does not optimize patient
acquisition costs, labor
utilization or analytics



NO CONTROL

Difficult to brand and
no control over
patient identity



MISALIGNED

Low video visit volumes
make model infeasible;
pricing not aligned with
health system success

DexCare

BUILT TO MEET THE UNIQUE NEEDS OF A HEALTH SYSTEM

SEAMLESS USER EXPERIENCE

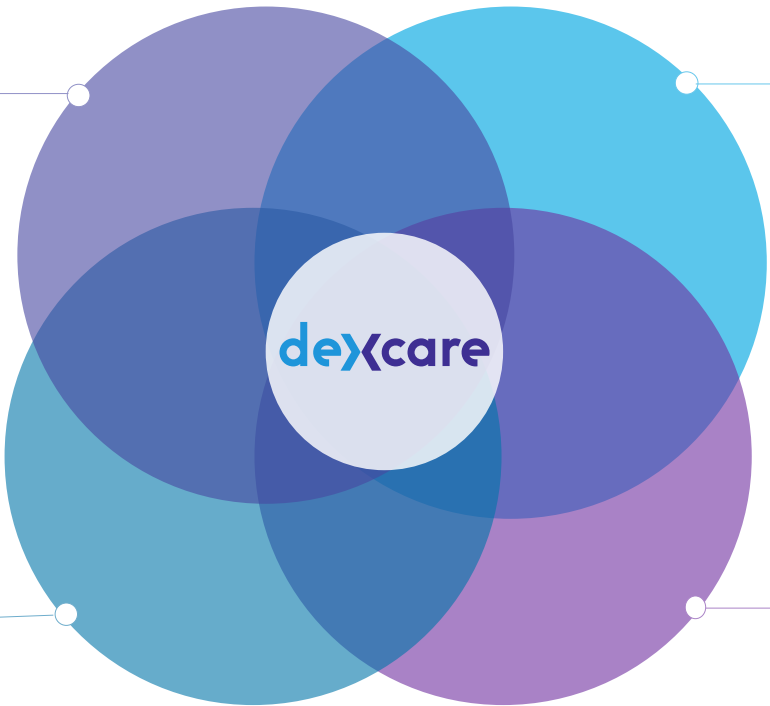


PRICE ALIGNMENT ACROSS
SAME DAY CARE ALTERNATIVES

SUPPORTS SAME DAY
CARE BUSINESS MODEL



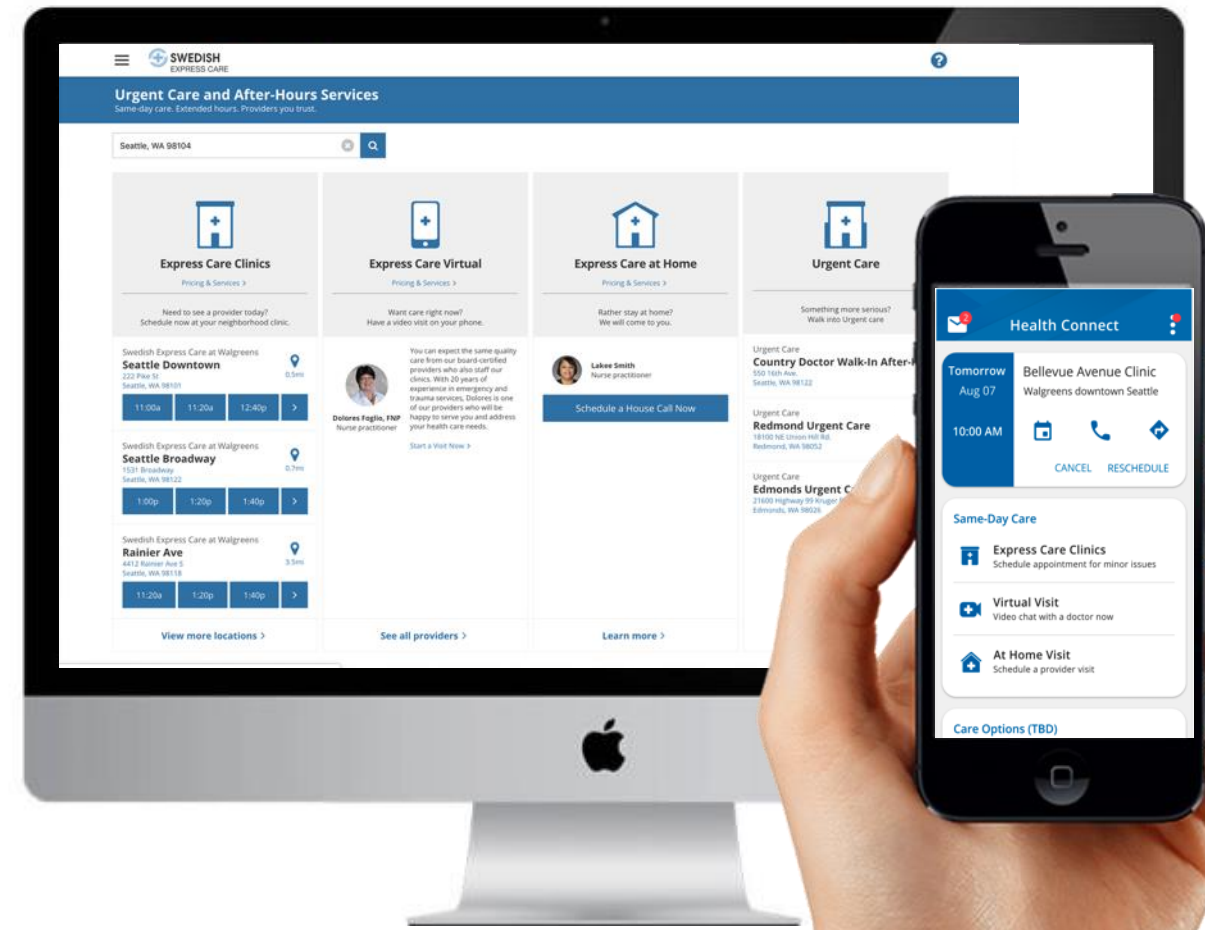
YOUR BRAND; YOUR PATIENTS





Intelligent Digital Platform for Same Day Care

- Turn-key Solution: Unifies all modalities and venues of care
- Offers a single, seamless experience to both the consumer and the health system
- Drives growth through acquisition, efficiency and engagement



Consumer Experience

DESIGNED TO CONVERT AND ENGAGE



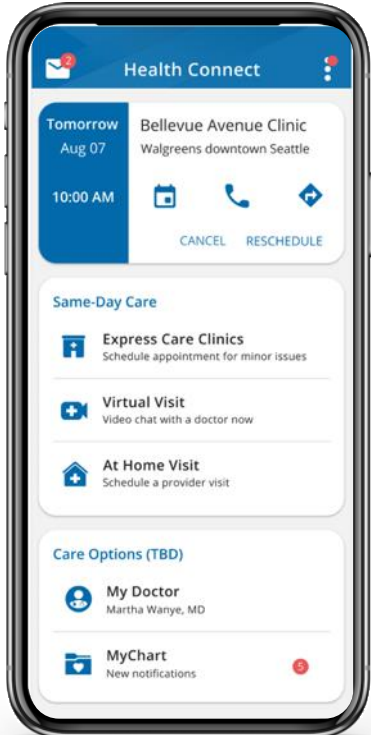
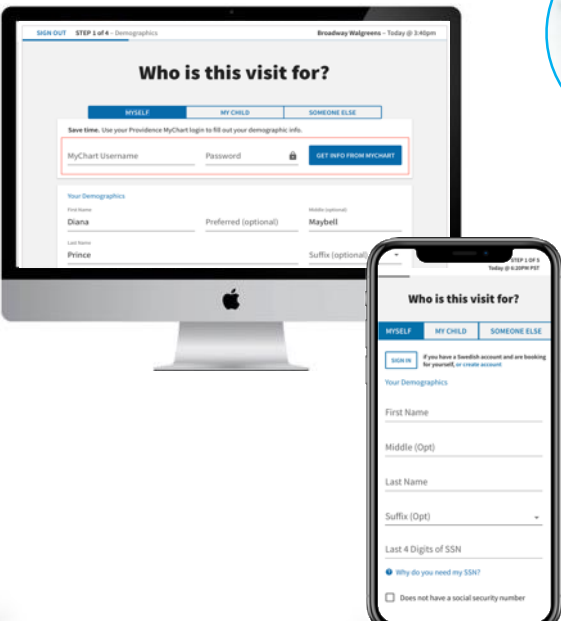
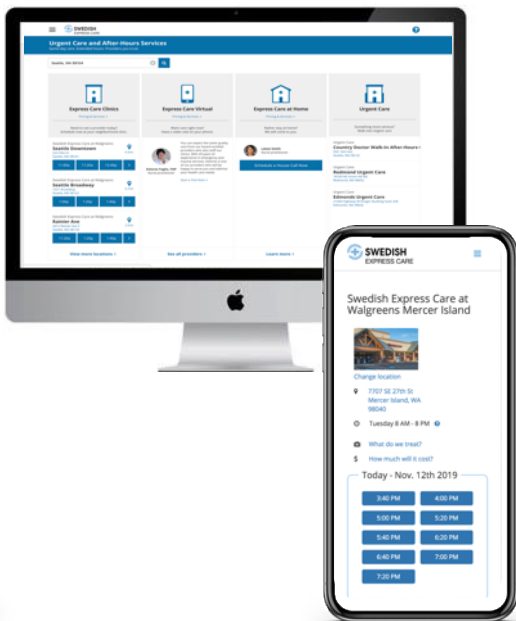
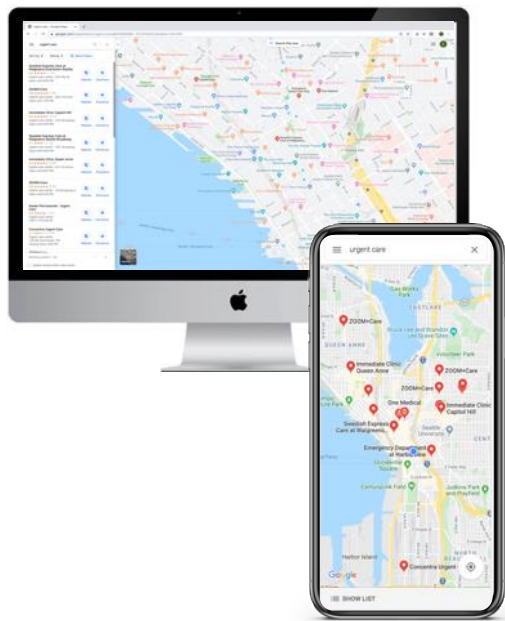
DISCOVER

REQUEST

VISIT-READY

VISIT

ENGAGE



SEO/SEM/Local Optimized

Scheduled Retail
On-Demand Virtual
On-Demand @Home

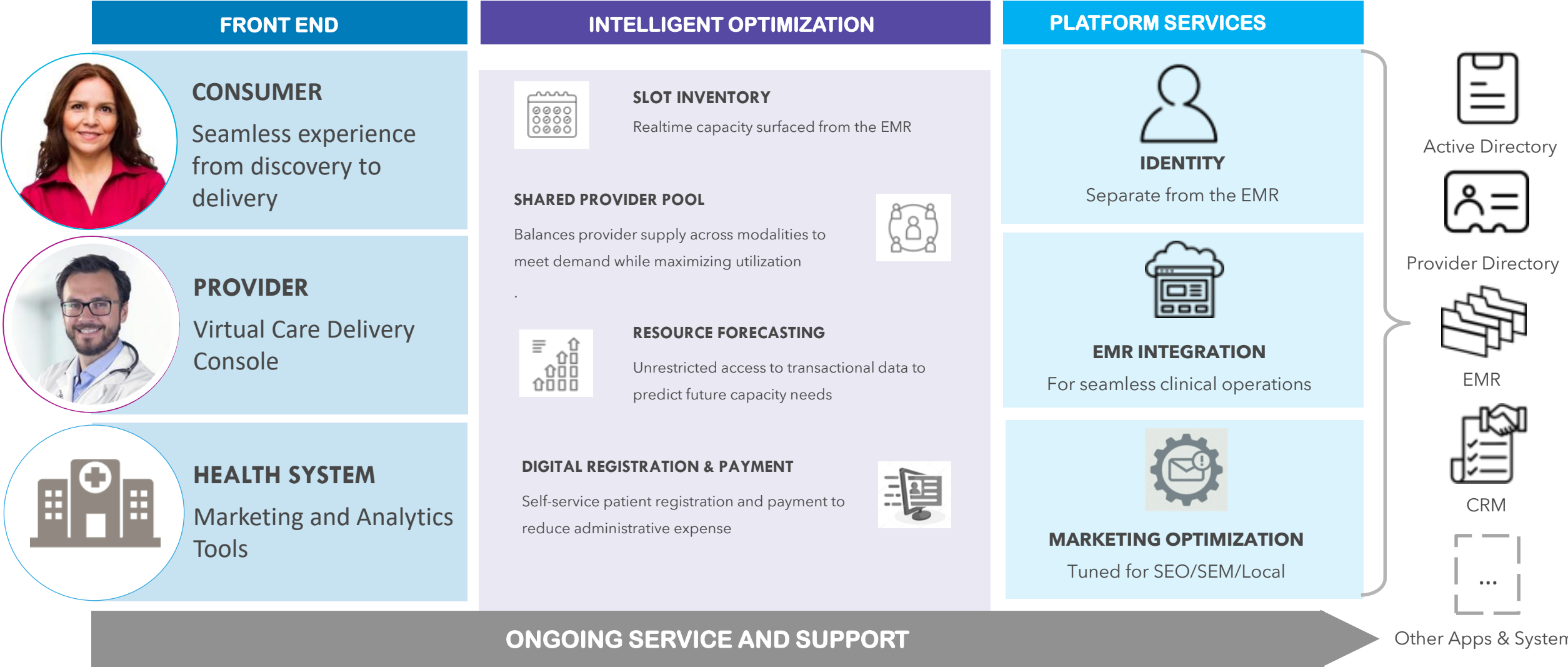
Digital Registration
Online Payment
Symptom Checker Chatbot

Multi-modal
(In-person/Virtual)

Your App + SDK

Platform Overview

INTELLIGENT DIGITAL PLATFORM FOR SAME DAY CARE



Early Indicators

DRIVING GROWTH THROUGH ACQUISITION, EFFICIENCY AND ENGAGEMENT

65%

Digitally Enabled

73%

Commercially
Insured

30%

New Patients to
System

1.5x

In Downstream
Revenue

82

Patient NPS

10%

Virtual Visit Mix



Q&A



Aaron Martin

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**We thank eHealth Initiative member,
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commitment to us and their support of our
mission.**

