



How does that make you feel?

**Healthcare providers need new
methods to serve empowered
consumers and their highly
individualized needs**

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Introduction

People have always needed doctors. Now, doctors need patients just as much.

With federal mandates to drive costs down and provide transparency into the connection between services and fees, competition over who will have the opportunity to treat patients is fierce. The simplest way to think about it is that healthcare buyers are now consumers. And consumers are much more powerful than “patients.”

So how does the provider community deal with the empowered consumer? Up until now, many individuals didn't have access to information that would allow them to make informed decisions and relied upon their doctors and health plans to steer them toward the best treatments and preventive measures. Now patients give careful consideration to not only their diagnoses and care, but wellness practices as well. They expect a lot out of healthcare experiences, and they are demanding to be heard.

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How does that make you feel?

The patient psyche

From initial symptoms to testing and diagnosis to treatment and after care, providers need a better understanding of what makes their patients tick. What are they thinking? What are they feeling? And how can the provider maximize their positive experiences and, even more importantly, minimize their negative ones? Recent research has shown, as essential as it is to give patients positive experiences, undoing negative experiences is even more critical.

With new channel access and competition with retail clinics and urgent care outlets, doctors and hospitals are having to act more like traditional marketers. Doctors have to meet patients “where they are” and engage with them every step of the way on their healthcare journey.

One way that providers can go about this is by using a technique long used by marketers in industries like retail and financial services – customer journey mapping. When applied to healthcare, **KPMG calls this process of understanding the patient's psyche and figuring out touchpoints for effective intervention Patient-Centric Journey Mapping.**

What is patient-centric journey mapping?

The technique entails coupling advanced data and analytics-derived insights with deep understanding of human behavior, cognitive psychology and business processes. Provider organizations can take a look at patients' temporal and physical journeys through the healthcare system over time and seek insight into their emotional states each step of the way.

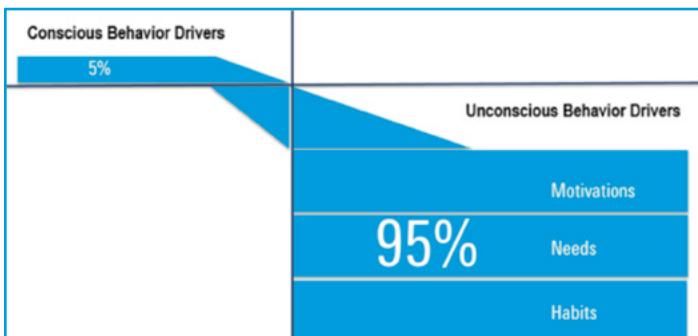
The most important outcome is discovering the actual problems that need to be solved, i.e., where patients are having negative experiences that might result in their terminating treatment, misinterpreting their physicians' instructions, or changing providers. By looking at specific patient behaviors, providers can focus on why they are occurring and how they can help change the experience. Change comes through creating the right experiences – digital, mobile and traditional – that might enhance patients' relationships with providers, minimize obstacles to care, and provide value.

Creating personas

The first step in Patient-Centric Journey Mapping is conducting research to understand patients' psychology and then parsing the results to create specific personas – or semi-fictional representations of ideal customers. Research should focus more on ethnographic behavioral studies rather than first-person interviews. The difficulty with the latter is that people aren't very good at articulating their needs. In fact, if you simply ask patients and consumers, they will be apt to tell you what they desire, but may not provide accurate answers based on insight into what they need. Instead, researchers need to look at everyday behaviors, which involves observing users in their environments and analyzing comments in online communities and on social media. This direct qualitative research can then be further verified

through quantitative research methods including feedback questionnaires, online customer satisfaction surveys, and Web analytics.

More so than in any other industry, there will be almost as many unique experiences and personas as there are people in the world. For example, one person might love to spend hours on the Internet researching symptoms while another only likes to speak directly to his care provider. One might panic at the first sign of an unusual symptom, another might wait months before taking action. And, of course, there are many persona variations even with a specific disease state.



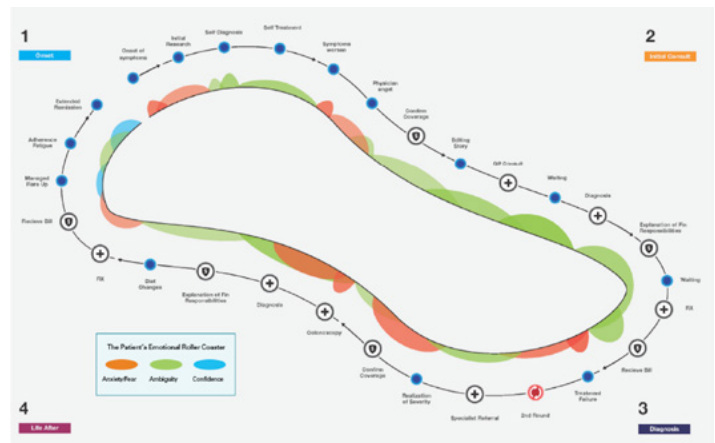
Some examples of healthcare consumer personas include:

- Diabetics with HbA1c readings of >7.5%
- Patients with a terminal illness and co-occurring depression
- Pregnant women with repeat c-sections
- Chronically ill patients with degenerative illnesses like COPD or pulmonary hypertension
- Medicaid patients who may only be able to afford to see a doctor when very sick

Mapping the results

The next steps before getting to actual patient engagement include defining the desired outcome or what the provider wants the patient to do, mapping out the customer journey from the patient's perspective, and then overlaying touch points where the provider can intervene with some form of communication or recommendation. Along the way, the provider will begin to see "moments of truth" or those times that a patient is at a crossroads between a positive and a negative reaction to working with the practice. Finally, the provider can identify the types of engagements that will help improve both short- and long-term relationships with patients.

The provider will begin to see “moments of truth”



A word cloud featuring various roles and titles associated with the healthcare industry. The words are arranged in a circular pattern, with 'person' and 'human' being the largest and most prominent. Other significant words include 'customer', 'employee', 'patient', 'member', 'client', 'payer', 'physician', 'practitioner', 'nurse', and 'user'. The colors range from light blue to dark blue, with some words in white.

Choosing means of patient engagement

Most important is to get to the root issue a patient is having and not superimpose an engagement solution before that understanding is reached. For example, technologies like mobile apps, patient portals, EMRs, and wearables can be valuable tools, but only if they are matched with a particular patient need.

While the specific form of digital or mobile communication chosen will depend on the personas pursued, there are some general principles to keep in mind. Since providers are now marketing directly to patients, they must adopt consumer-focused models of marketing, customer service, and engagement. For example, just as health plans have begun to do, provider

organizations need to accommodate better informed and discerning consumers with interactive e-commerce experiences, including side-by-side practice comparisons and customer reviews. Further, providers may need to devise new engagement models that involve interacting with consumers with wellness and prevention tools before adverse events occur. For ongoing, non-critical patients, outreach may be key and should include reminders to schedule annual checkups and recorded calls for pharmacy prescription refills. Finally, all providers should consider alternate channels for treating patients, including mHealth and telemedicine.

According to a recent study from Harris Interactive and others, patients value the following means of interaction with their physicians mostⁱ:

- **Access to their own medical records (82 percent)**
- **Booking appointments online (77 percent)**
- **Refilling prescriptions electronically (76 percent),**
- **Receiving appointment reminders via email and text (75 percent).**

Being able to review their own medical records was so important to some consumers that 44 percent of those surveyed by Harris Interactive said they would switch doctors if denied access. One way that providers can offer such access is through technologies like OpenNotes. A study from the Joint Commission Journal on Quality and Patient Safety showed that this means of engaging with patients had a profound psychological impact, allowing consumers to feel in control of their own healthcare. The results were more than just cognitive, however. Patients who are able to interact with their own records show higher rates of medication adherence and of remembering physician instructions from prior visits.ⁱⁱ

Further examination of both educational interventions (e.g., literature on an illness) and psychological interventions based on subconscious motivators (e.g., motivational interviewing) shows that the latter can often be much more effective. In a recent study of phone coaching by RNs with type two diabetics, interventions that enhanced patients cognitive and emotional functioning – e.g., helping them discern why they are lax in their insulin adherence or how they feel about the lifestyle impacts of their illness – resulted in a one percent decrease in average A1C

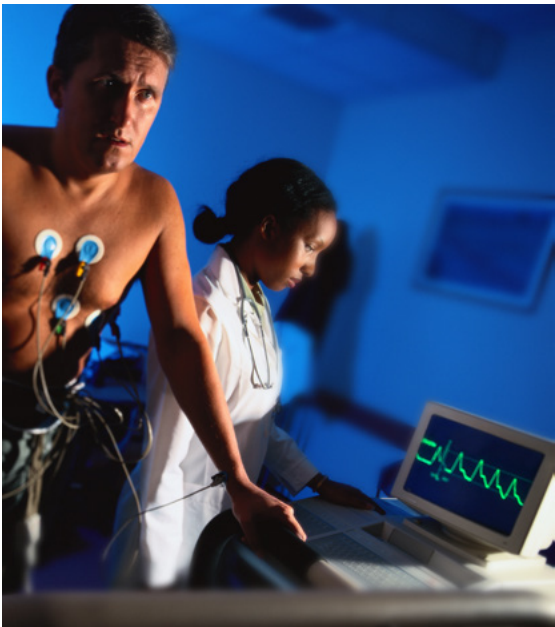


levels,ⁱⁱⁱ a significant health benefit.

ⁱ Consumer survey on patient engagement: US research recap, Harris Interactive.

ⁱⁱ Hall, S.D. (2015). Study: Use of OpenNotes increases safety, patient engagement, Fierce Health IT.

ⁱⁱⁱ Young D., Furler, J., Vale, M., Walker, C., Segal, L., Dunning, P., Best, J., Blackberry, I., Audehm, R., Sulaiman, N., Dunbar, J., Chondros, P. (2007). Patient engagement and coaching for health: The PEACH study – A cluster randomized controlled trial using the telephone to coach people with type 2 diabetes to engage with their GPs to improve diabetes care: A study protocol. BMC Family Practice, 8:20.



One patient's journey: Laurence

In order to illustrate how Patient-Centric Journey Mapping might provide opportunities for engagement, let's take a look at a specific patient – Laurence.

Steps:

1 Noticing symptoms

Laurence, a 64-year-old retiree, notices some out-of-the-ordinary urinary symptoms, i.e., difficulty evacuating his bladder and occasional passing of blood. His initial reaction involves researching his symptoms online. Along the way, he discovers that there are several opportunities for engagement with the healthcare system – an online discussion group sponsored by a local urology group, a questionnaire with links to physician resources, and an “Ask the Doctor” app from a specific urologist. Hearing from other patients with similar symptoms and asking specific questions of a doctor are enough to encourage Laurence to take a proactive next step – getting his symptoms checked out.

2 Choosing a doctor

Laurence has never seen a urologist before, so he looks through online reviews and star ratings of urology practices. He chooses Dr. Smith because he garnered four stars, and because there were opportunities for engagement with the provider before committing to an appointment. He felt he was able to get a good sense of the potential treatment experience with Dr. Smith via the doctor's interactive website, which comprised educational material about urological issues and a blog focused on the health issues men grapple with as they get older.

3 Testing

Laurence is able to get an appointment with Dr. Smith within a few days, and this rapid response greatly reduces the anxiety he feels about a potentially serious diagnosis. At the appointment, Dr. Smith takes the time to get to know Laurence, asking him questions not just about his symptoms but about the activities he enjoys both with his wife and with friends. He orders some blood work, including a PSA test to rule out prostate cancer, while taking care to reassure Laurence that he runs this test for all men his age. He schedules a follow-on appointment for a week later. He confirms that Laurence is able to receive texts on his phone and advises him that he will receive a text reminder of his next appointment.

The value of the patient journey

Understanding potential steps in a patient's experience and intervening with both real-world and technological interventions are not only valuable to patients, but a critical component of the industrywide transition to value-based healthcare, as well. The mandate to document and analyze quality and clinical outcomes is made all the richer when paired with a true understanding of the patient's experience.

This is about more than maximizing star ratings and online reviews. Patients' engagement in their own healthcare and positive feelings about their experiences can impact how often they visit their doctors, the questions they ask during an office visit, their adherence to medication regimens, and their dedication to self-care. At the end of the day, a more engaged patient should be a healthier patient.



4 Diagnosis

When Laurence returns for his second appointment, Dr. Smith informs him that he is in the early stages of kidney failure. While this is devastating news, the fact that Dr. Smith delivered the news in person, rather than over the phone, means a lot to Laurence. His anxiety and adjustment to the fact that he is going to need dialysis are made easier by the fact that Dr. Smith provides him with links to online educational material and a support group for other people with recent kidney failure diagnoses. He also informs Laurence that he has started offering telemedicine services to his chronic patients and that Laurence can call him in the event he is experiencing new symptoms, has questions about self-care issues such as diet and activity pre- and post-dialysis, or needs prescription refills.

5 Continuity of care

Dr. Smith's office sends Laurence a link to an online questionnaire to help him determine which dialysis center will best fit his lifestyle in terms of proximity to his home, hours of operation, cohort of other patients, and quality of support services, including counseling sessions with a social worker. Laurence feels cared for and secure in knowing that his urologist helped him pick a dialysis center and that there will be regular communication between the doctor and the center.

6 Ongoing self-management

Dr. Smith understands that Laurence is a patient who likes to take a proactive role in his own health and well-being and to access educational tools and support on the Internet. Therefore, he recommends several online tools and mobile apps for self-management of his illness, including one that allows Laurence to check on dietary restrictions and exercises that might lessen the severity and progression of his kidney disease. Despite his illness, Laurence continues a productive, happy "journey" for the next 20 years. He does this under the continuing care of Dr. Smith, who understands how to "meet him where he is."

How KPMG can help: Transitioning to a consumer-centric model

KPMG teams that assist provider organizations with Patient-Centric Journey Mapping and other transformation engagements comprise both digital/mobile creative teams and healthcare and life sciences advisory and strategy professionals. KPMG is an end-to-end digital partner to healthcare organizations from helping change the way they think and innovate, to understanding the potential opportunities in a patient journey, to designing and developing cutting-edge digital experiences, to helping organizations internalize KPMG's processes and approach so they can be self-sufficient.

KPMG's broader work in healthcare includes helping provider organizations transition to consumer-focused models through end-to-end business transformation strategies and advanced data and analytics. Several of the firm's recent acquisitions have particular salience to B2C solutions, including Cynergy, an enterprise mobile and digital provider, and Link Analytics, a predictive and advanced analytics entity.

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