



The Untapped Opportunity to Connect (with) Healthcare Consumers

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Connecting and Collaborating with Healthcare Consumers

- Healthcare transformation requires more than data collection and exchange
- Connected healthcare consumers want more than online information
- There's no "silver bullet" application or solution
- The opportunity is to provide experiences and establish relationships with healthcare consumers



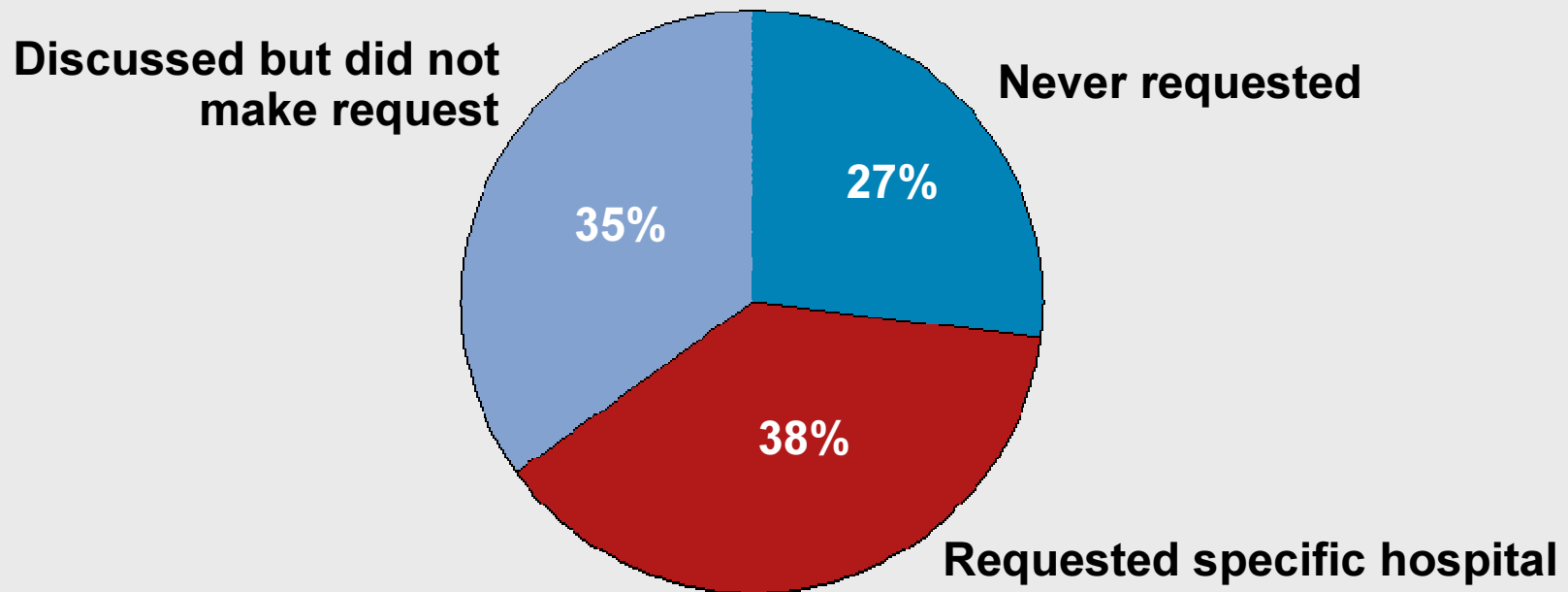
interested

involved

partner

Consumer Relationships are a Healthcare Business Imperative

“Have you ever requested a specific hospital from your physician?”

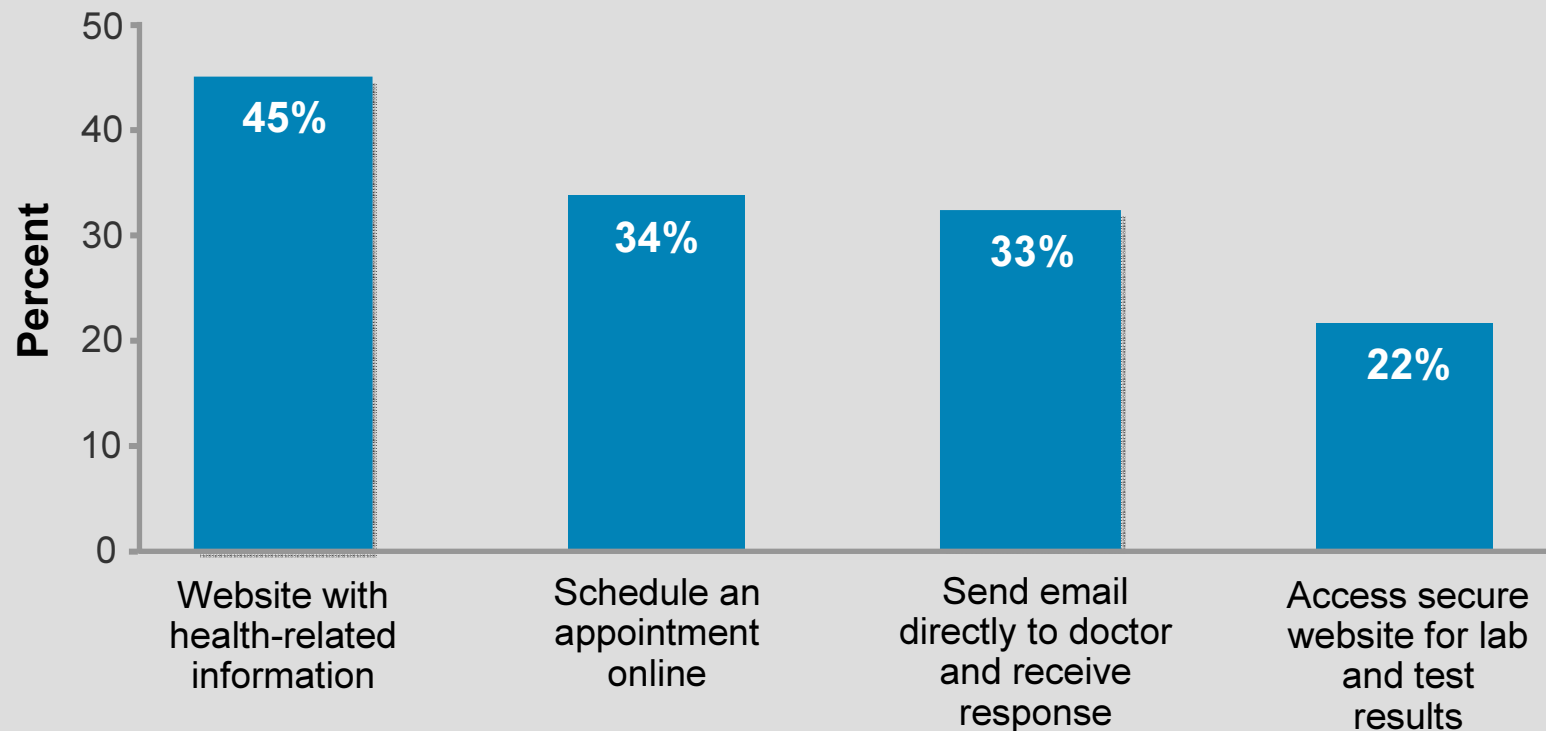


- Physicians often accommodate patient requests
- Top reason to switch—better informed

Source: “A better hospital experience,” Grote, Newman and Sutaria, McKinsey quarterly, November 2007

Begin With the Online Services Consumers Want Most

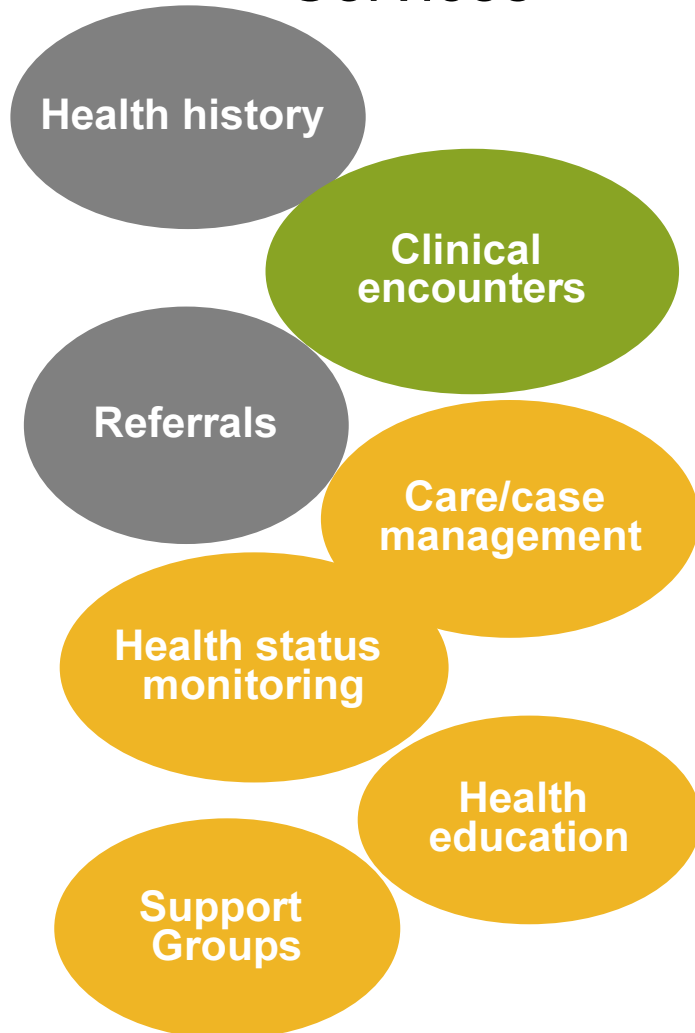
Assuming these services were all available from your primary care provider, which would be most important to you?



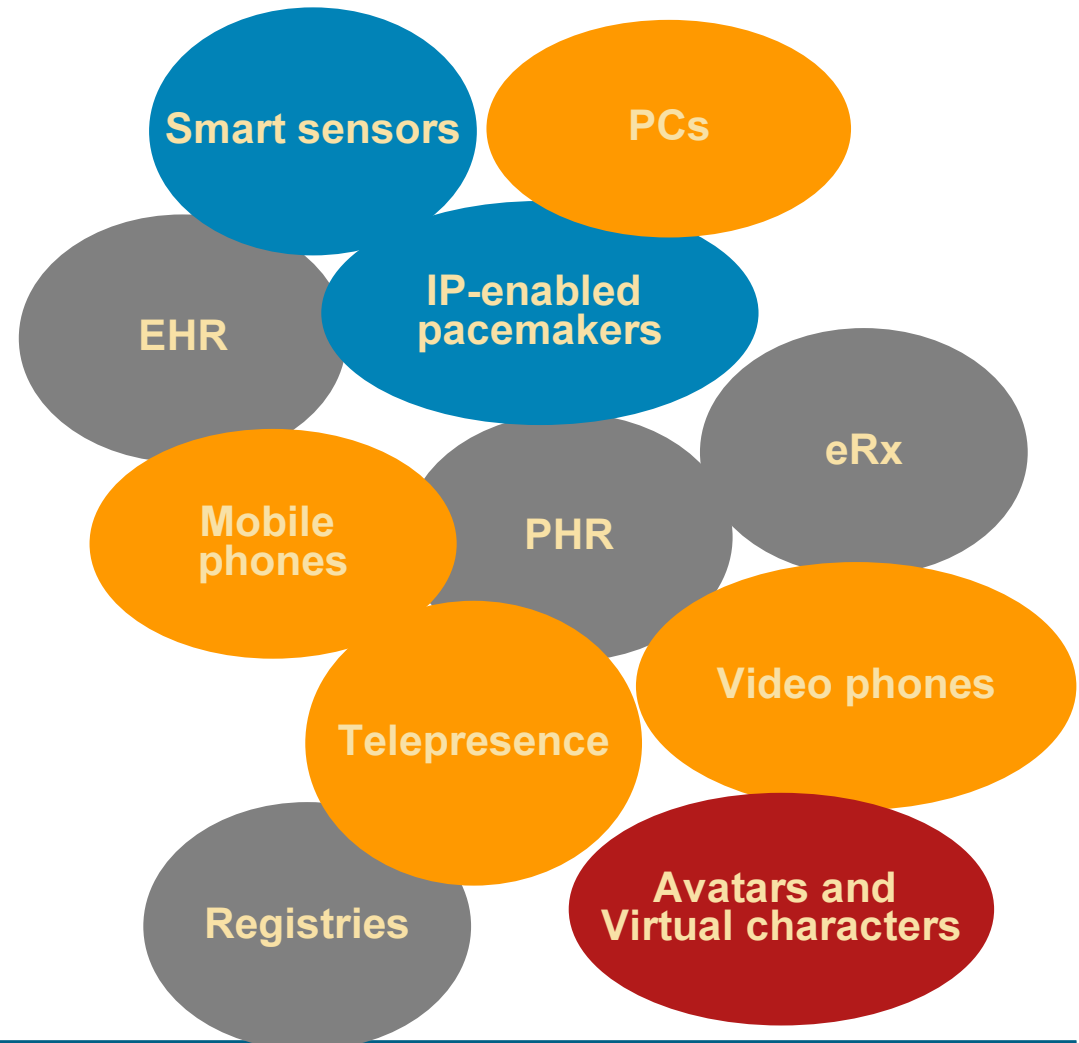
Base size: Q14 = 1,659; Q15 = 4,105

Planning Ahead; Multiple Technologies Create a Range of Services

Services



Technologies



Ultimate Success Requires Customizing for Individual Needs and Expectations

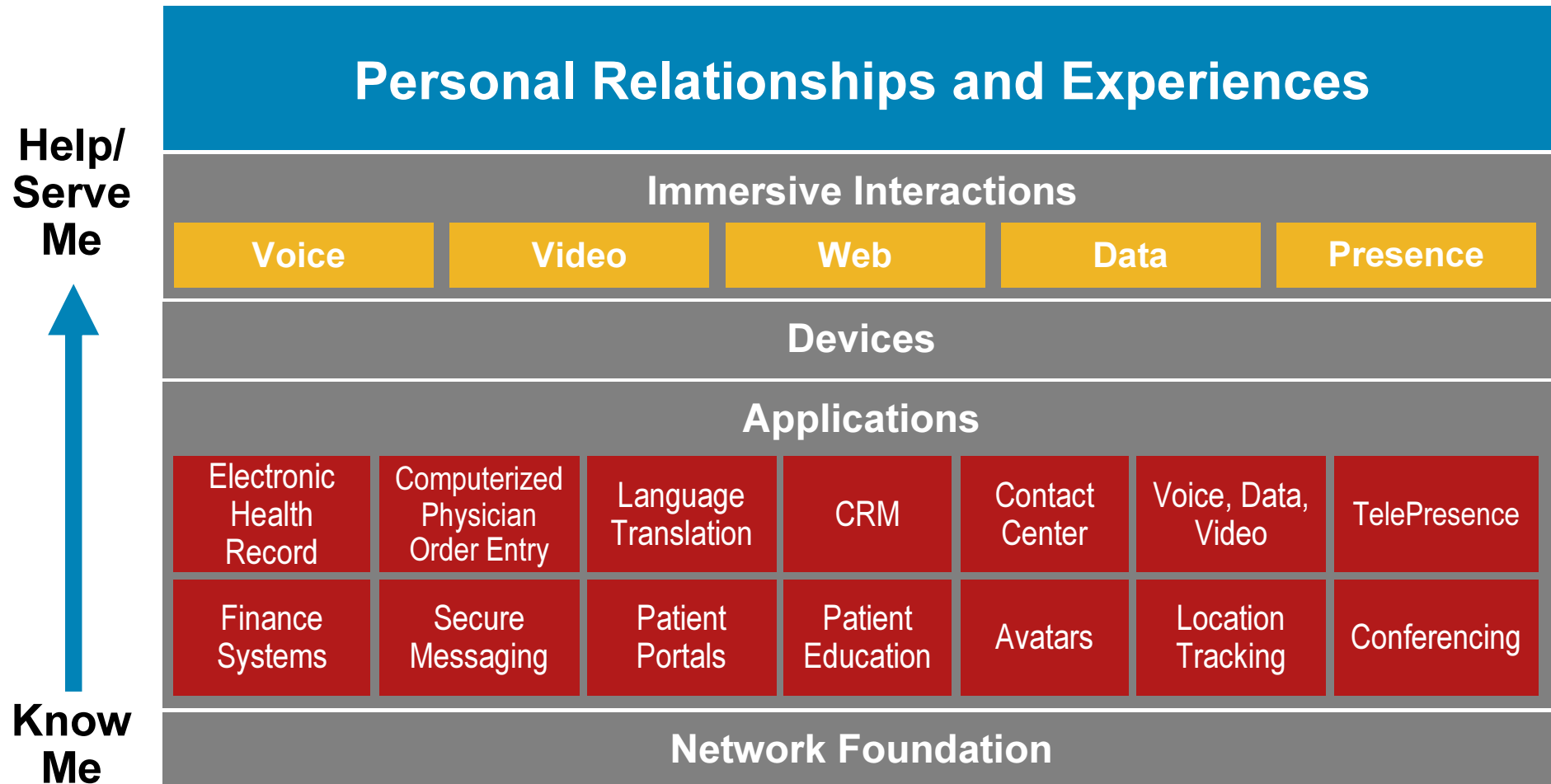
| Generation | Demand |
|-----------------------------------|--------------------------------------|
| •Greatest Generation 1924-1945 | •Direction |
| •Baby Boomer 1946-1964 | •Engagement •Dialogue |
| •Generation "X" 1965-1984 | •Education •Involvement |
| •Millennial 1985-2002 | •Social Interaction and Community |

Expectations & Preferences

- Culture
- Values
- Behaviors
- Gender
- Age
- Language
- Education
- Experiences

Adapted from Michael Howe, Founder Minute Clinic

Personal Relationships Develop from “Know Me” & “Serve Me”



Source: Cisco IBSG, 2009

A View to the Future: Virtual, Personal Healthcare Concierge

- Knowledge of previous encounters
- Access to comprehensive information
- Customized for culture, language, gender

