### Step 1: Develop foresight

### **Foresight statement:**

In 3 years, 10% of physicians are employed by retail providers (e.g., Amazon, Walmart) that better fulfill physicians' desires for schedule flexibility and work-life balance.

### **Step 2: Draw insight**

### How will this foresight statement most likely influence consumer behaviors and preferences?

Consumers will want more convenience – like telehealth.

### What challenges will your organization face when responding to

- Reducing costs to make care cheaper (cost = element of convenience)
- Creating an exceptional user experience
- Staffing considerations:
- Roles offered by retail providers may be more appealing
- Getting folks (IT, medical assistants) on board to launch convenience initiation

### Step 3: Determine action

### What quantitative and qualitative signals should we monitor to determine whether our foresight statement in Step 1 is coming true and to guide our actions?

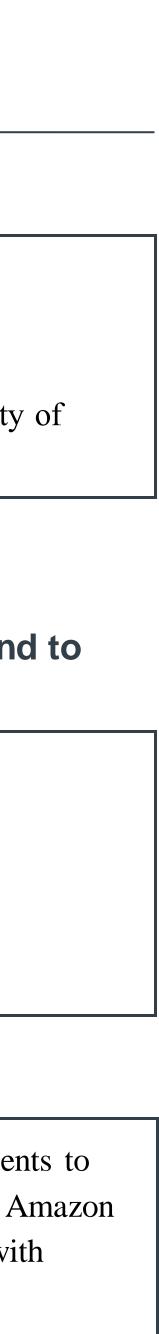
- Physician turnover and burnout may signal they want a more flexible environment
- More M&A announcements e.g., PBMs and thinking about the "so what" and the importance of the assets
- Consumer feedback e.g., Press Ganey, patient experience on wanting more flexibility
- If they want more flexibility and you can't provide it, then someone else will figure it out and they'll be the one recruiting for physicians
- Physician engagement surveys

### What strategies could your organization use to respond to the most likely consumer behavior or preference change in Step 2?

- Figure out how to give more flexibility to patients to retain them
- Market convenience offerings to attract patients
- Identify pain points in patient/staff experience and quick wins to solve them
- Think about pain points that affect both patients and staff

o the most likely consumer behavior or preference change?	
	<ul> <li>Figuring out where convenience ends – fast, cheap/good value</li> <li>Figuring out who the consumer is and what "convenient" means to them</li> <li>Ex: What's convenient differs between millennials and older population</li> </ul>
tives	<ul> <li>Acknowledging that you can't cater to everyone; figuring out what the majority consumers want</li> </ul>

- Think about innovative ways to partner with Amazon to drive more acute patients to traditional organizations for care (e.g., for surgery, chemotherapy) rather than Amazon
- Open conveniently located ambulatory clinics in the community to compete with Walmart



### IN THE PROMISE OF HOME-BASED CARE Envisioning the future of consumerism

### Step 1: Develop foresight

### **Foresight statement:**

In 5 years, 30% of non-acute care and 5% of acute care is delivered in the home (either virtually or in-person).

### **Step 2: Draw insight**

### How will this foresight statement most likely influence consumer behaviors and preferences?

Consumer loyalty will be reprioritized based on different factors than we see today – cost, access, responsiveness, provider adaptability.

### What challenges will your organization face when responding to the most likely consumer behavior or preference change?

- Changing the perception that virtual care is lower-touch and making sure patient the decision to offer care in the home is patient-centered and not provider-cent
- Creating IT infrastructure that can connect patients in a HIPAA-compliant way
- Making home-based care a structured part of how we deliver care, rather than hoc offering

### Step 3: Determine action

# What quantitative and qualitative signals should we monitor to determine whether our foresight statement in Step 1 is coming true and to guide our actions?

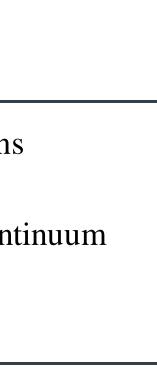
- Volumes performed virtually and in the home
- Patient satisfaction trends based on visit type
- The contribution margin to the provider entity based on visit type
- Physician satisfaction

### What strategies could your organization use to respond to the most likely consumer behavior or preference change in Step 2?

- Market convenience offerings to attract patients
- Establish local partnerships to enhance technology accessibility

tients feel	• Understanding and meeting the needs of patients from different generations
ntered	• Overcoming distance barriers for rural patients to receive in-home care
yay	• Ensuring the patients are supported and connected throughout the care cont
n an ad-	even as care potentially becomes more transactional

- Quality measures (example: A1c compliance for diabetes patients)
- Health plan membership growth
- Reimbursement
- What happens with the current virtual-first landscape





### Step 1: Develop foresight

### **Foresight statement:**

In the next 5 years, the majority of consumers will be comfortable using digital tools for non-acute care.

### Step 2: Draw insight

### How will this foresight statement most likely influence consumer behaviors and preferences?

Consumers will opt for quicker access to care via virtual services.

### What challenges will your organization face when responding to the most likely consumer behavior or preference change?

- Accessing technology and proper platforms to access care
- Creating IT infrastructure to support digital tools
- Obtaining payor coverage
- Getting provider buy-in

### Step 3: Determine action

# guide our actions?

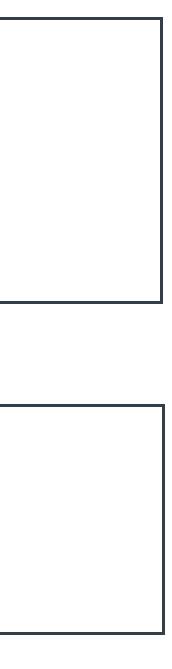
- Expanded payment and eligibility for virtual visits
- Trended access data for utility and usage
- Cost of virtual services
- Consumer satisfaction surveys
- Private equity investment trends

### What strategies could your organization use to respond to the most likely consumer behavior or preference change in Step 2?

- Push for payer/payment reform
- Establish local partnerships to enhance technology accessibility
- Marketing to advertise virtual products and services

What quantitative and qualitative signals should we monitor to determine whether our foresight statement in Step 1 is coming true and to

- Use data to identify most impactful services to provide
- Lobby for increased coverage



### Step 1: Develop foresight

### **Foresight statement:**

In the next 5 years, up to 50% of care delivered will be part of narrow networks.

### **Step 2: Draw insight**

### How will this foresight statement most likely influence consumer behaviors and preferences?

Patients will prioritize cost over convenience.

### What challenges will your organization face when responding to the most likely consumer behavior or preference change?

- Ensuring cost structure exists to be in network
- Need resources and staffing models to support demand and reduce costs

### Step 3: Determine action

# guide our actions?

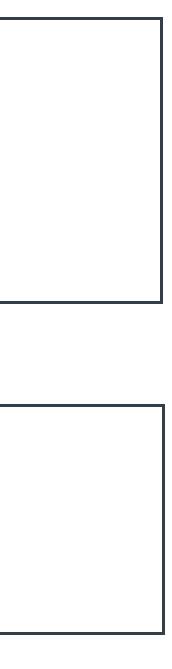
- Contracts
- Volumes
- Patient satisfaction

### What strategies could your organization use to respond to the most likely consumer behavior or preference change in Step 2?

- Drastically increase access
- Recruit providers
- Invest in patient navigators

What quantitative and qualitative signals should we monitor to determine whether our foresight statement in Step 1 is coming true and to

- Target contracts and employers
- Enhance wrap-around services



### Step 1: Develop foresight

### **Foresight statement:**

In 1-2 years, increased copays will deter patients from seeking traditional care.

### **Step 2: Draw insight**

### How will this foresight statement most likely influence consumer behaviors and preferences?

Patients will forgo preventive care.

### What challenges will your organization face when responding to the most likely consumer behavior or preference change?

• Hospital emergency departments will be faced with an increase in patient volumes and sicker patients who will present with symptoms/diseases that could have been identified earlier through screening and preventive care.

### Step 3: Determine action

### What quantitative and qualitative signals should we monitor to determine whether our foresight statement in Step 1 is coming true and to guide our actions?

- Advanced stages of disease at presentation
- Screening volumes and revenues
- Patient no-show rates
- Prescription pick-up rates

### What strategies could your organization use to respond to the most likely consumer behavior or preference change in Step 2?

- Enhance community screening capacity
- Enhance telehealth capabilities

