

The Prognosis for What's Next in Healthcare

An Airfoil White Paper

Upheaval can be exciting. It's how mountains are made ... but earthquakes, too.

The healthcare industry is entering an era in which the ground will be moving more than ever before, and where forces from several directions are causing an upheaval that will leave some players quaking, while others ride the force of change to the top.

No big surprises on what the forces are, but their intensity will require, among other resources, a new generation of communications strategies because so much of what is happening will have the consumer at the core. And the healthcare consumer has not been static. In some ways the consumer is leading the way for change, and players in the healthcare industry need to know why and how they should follow, as well as why and how they need to lead.

It is all about communication.

To be sure, much is dependent upon legislation. And scientific research is what we all depend upon to raise the bar on what can be done to prevent and cure sickness and disease. But even here communication plays a key role, whether in announcing clear policy, or describing the relevance and applications of scientific findings.

While leaving policy formation and the chronicling of lab findings to others, there is a rapidly escalating need for properly crafted PR strategies and messaging to guide and ride so much of the upheaval happening within healthcare.

A spectrum of challenges

For a better appreciation of the need for great communication strategy and messaging, just consider the spectrum of challenges healthcare faces:

- **Healthcare Reform.** Who would have guessed that healthcare reform would have emerged as one of the key issues of the 2008 Presidential election? And note the complexity of the call for *reform*, as it is called for from many quarters. States want to reform the burden they face for Medicare and Medicaid. Providers seek reform in compensation from federal and state agencies. Payers seek reform in the efficiency with

which healthcare is delivered. Pharmaceuticals seek reform in the way new medications are vetted and the way older medications are timed off of royalty protection. Physicians want to reform the state of malpractice insurance and litigation. And the consumer, whether insured or uninsured, wants to reform the way healthcare is delivered and paid for.

- **Technology Innovation.** From the highest levels of state and federal government, to the consumers of healthcare, there is a growing voice for healthcare providers to take advantage of the technological innovation that has already engendered huge efficiencies elsewhere in everyday life. From integrating disparate data silos, to enhancing outcomes, the consensus is that innovative technology can improve healthcare delivery.
- **Electronic Medical Records.** Electronic Medical Records—and Electronic Health Records and Personal Health Records and the balance of the variants on the theme—seem like such an obvious technology to implement; but it is also expensive, meaning providers aren't eager to be pioneers—those brave souls who, at least metaphorically, sometimes end up face down in the mud with arrows in their backs. But after President George W. Bush called for them in two State of the Union addresses, it certainly isn't a radical notion—just one that needs to get done. This may be an area in which consumers lead the way. People who store their photos online, and can use a mobile device to stay connected with the world via e-mail, instant messaging, and Twitter tweets, find it archaic to watch their physicians and nurses fumble around with paper folders that have to be shipped from office to office as if being dispatched by Pony Express or steam locomotive.
- **Enhancing Outcomes.** Enhancing outcomes is the polite way of saying: Stop making medical mistakes. Honest. The LeapFrog Group, supported by the influential Business Roundtable, was formed by a group of large employers to provide market rewards for hospitals that implement significant improvements in quality and safety. The need to “leapfrog” ahead to better healthcare delivery was underscored in definitive report by the Institute of Medicine that found that up to 98,000 Americans die every year from preventable medical errors made in hospitals alone. Payers have started their own programs to recognize and reward hospitals and physician practices that can document adherence to best practices that enhance outcomes. Not surprisingly electronic medical records, physician practice software and ePrescribing software are seen as key elements to enhancing outcomes.
- **Boosting Scientific Research.** We need better anti-virals—big time. We need a broader array of antibiotics to keep pace with mutating superbugs. The world needs more precise ways to attack cancer, and we need the molecular keys to unlock the solutions to problems such as diabetes, cystic fibrosis, and heart disease. With online DNA libraries becoming more complete, researchers need new tools to model biological reactions to better predict the effectiveness and safety of new agents prior to entering the expensive and time-absorbing phase of clinical trials. Medicine has always

depended on research, and whatever can be done to facilitate basic research and its conversion to applied results should make the world a better place.

- **Collaborative Patient\Physician Relationship.** The parochial model of physician as the source of all knowledge, and patient as the grateful recipient of service is changing as patients, as health consumers, turn to the Web to augment their knowledge before and after seeing a physician. The spectacular news is that healthcare consumers are showing up at appointments with a far deeper understanding of what symptoms might portend; and once diagnosed they come into follow-up exams much better prepared, often with inquiries about research they've found on the Web. Additional benefits come from the fact that, the better informed patients are about a condition, the more likely they are to follow the regimens required to treat the problem. What problems are posed by Web-savvy patients? Physicians may sometimes have to explain why—and do the research to be able to explain why—a treatment being done at Duke University wouldn't be advisable or applicable for what the patient has. But there are even positives here, as it can lead to a deeper understanding on the part of the patient, a stronger bond with the physician and perhaps even a better informed clinician.
- **Greater Competition for Patients.** Any city with more than one hospital and more than a handful of physicians will see greater patient scrutiny in making healthcare decisions. The same consumers who search the Web to find the best price on stereo gear and automobiles are also doing more research before committing to a hospital or physician. As consumers pay more of their own healthcare costs, they want to be sure they are getting the best care, as well as the best value. The Web provides the most efficient word-of-mouth, so hospitals, physicians, and others subject to consumer choice will need to pay close attention to how they are seen on the Web.
- **Decentralization of Healthcare Delivery.** As patients become consumers, and bear a greater burden of paying for their healthcare, market-driven innovations such as the “Minute Clinics” and other low-cost, flat-fee, walk-in centers being rolled out by consumer giants such as CVS, Target, and Wal-Mart. This creates opportunities for providing low-cost care to more consumers, but it also raises questions about continuity of care and how well the hand-off is managed when a walk-in clinic physician tells patients that they need to see a specialist.
- **Registered Nurse and Physician Shortage.** No news here. The demand for RNs has outstripped supply for years. With the aging of the Baby Boom generation the shortage is expected to only tighten. Communications can play a role in attracting RNs and creating an environment that will build a sense of community and achievement that will help them stay. As for the physician shortage, it might not be seen in New York, Miami, Chicago, Seattle, or San Francisco. But across much of the rest of the country, especially in smaller cities and towns, attracting and keeping physicians can become a matter of life and death.
- **Systems Integration.** No one needs systems integration like healthcare needs systems integration. You could say: The stock market needs systems integration, or the banks

need systems integration. But ... they've *already got* systems integration. The Health Insurance Portability and Accountability Act (HIPAA) got things moving in the right direction, but the systems integration work has only just begun. Add to that the need for electronic medical records and physician practice solutions; along with enterprise resource planning and supply chain management, and there is huge work that remains to be done in integrating disparate systems, breaking down the silo-like barriers between applications and data stores, to create the kind of environment healthcare needs to leapfrog ahead.

- **Wellness.** Wellness represents a real paradigm shift. It challenges healthcare to focus on keeping people healthy, rather than the old model of simply fixing them up after the fact. The challenges here abound: How do healthcare providers communicate with healthcare consumers to keep them healthy? How are these services compensated when the existing payer model is based on treatment reimbursement? Promoting wellness, and a model that supports delivery of wellness services, could radically enhance the health of the nation.
- **The Need for Community.** We save this one for last, because it is the foundation of providing the answer to so many of the challenges healthcare faces. The need for community won't show up on your standard list of problems facing healthcare, but to ignore the need for building community is to risk the tar pits. Fortunately, we all benefit from the simple, yet pervasive, technology and culture of the Web. Upon this electronic rock great communities are built. From Web sites and Wikis to e-mail and instant messaging, the tools already exist to create powerful communities to unite constituencies across the landscape in enhancing healthcare.

Informed solutions

The faint of heart might be dismayed by the walk we've just taken through the challenges facing healthcare. But serious industry players should emerge smiling: *What a wealth of opportunities!*

Taking advantage of these opportunities—which is to say, making the world a better place by enhancing the delivery of healthcare—requires a lot of things, including innovative technology and new ways of thinking.

It also requires a new set of communication skills. The world has moved far beyond the realm of 4-color glossies (though they are still nice) trade shows (not likely to disappear for quite some time) and television ads (expensive but, when done well, effective) to a new model based on tightly targeted communication that informs, that creates a bond of partnership, and that nurtures a sense of community.

In our information-based world of the Web and instant messaging and online communities, solution providers need a partner who can help craft the ways in which their story is introduced to the world, and the way their story is fostered to grow with the world.

Deep messaging is required. Deep, as in resonating with truth and relevance. Deep messaging is based upon deep knowledge of the problems and deep understanding of how your solutions make the world a better place.

Prognosis ... community and communication

For so many of the challenges--and opportunities--in the healthcare field, the answer is found, at least in part, in building communities of interest. Whether pushing for specific areas of healthcare reform, or selling the need for (or solution to) electronic medical records, or enhancing outcomes, a foundation is best built by creating a community that needs your solution and demonstrating to that community how you can help. Scientific research has always been based on community, whether in the lab, at conferences, or in the pages of journals. And community building is a key to enhancing collaborative patient/physician relationships, responding to the greater competition for patients, closing the gaps when facing decentralization of healthcare delivery, or working to resolve nurse and physician shortages.

Maximizing your presence in e-worlds

Grandparents are on e-mail, their children are on the Web, and their grandchildren are instant messaging rather than phoning their friends. Actually those e-mailing grandparents are also on the Web, but the idea here is that Western society has embraced electronic communications at a staggering rate.

A hospital competing with other regional centers better have a Web page that is more than pretty. They need to have a Web page that is exceedingly easy to navigate and worth the navigational effort because the information it provides is both broad and deep.

Physicians should know that their patients and would-be patients will be researching them on the Web and will not be impressed if the first hit is, as with one otherwise respected oncologist, their personal testimonial for a wealth-building seminar they attended. Web pages should be patient-focused and filled with clear and complete information aimed at whoever may be needing the services of their area of expertise.

Hospitals, physicians, insurers and others concerned about ensuring that patients properly follow regimens to control ongoing health problems should be taking advantage of the power and immediacy of e-mail and instant messaging – building a sense of community at the same time. Does a medication need to be taken every four hours? Is the patient supposed to be logging diet or activities? If regularity of communication would make their life easier, then e-mail, instant messaging, and other electronic forms of communication are virtually free to deliver and can do much good while building a sense of community.

On the Web, patients have been some of the original community builders. Pick a disease or other health condition, search the Web, and one of the top hits is likely to be a site created by a lone patient who, frustrated with the lack of information, has created his or her own gateway to information and links to other resources. Wonderful community is created here, as they share stories, experience and advice.

Concerned healthcare consumers have turned other sites, such as WebMD and Healthcentral, into major destinations because they provide one-stop access to a world of relevant medical information. Well designed hospital or physician sites can provide similar gateway functions, reducing the need for patients to go searching on their own.

Similarly, vendors of electronic medical records and physician practice solutions, along with system integrators, can benefit from effective communications that create online user communities where case studies and real-world experiences can be shared to create a vibrant world of relevant information.

Creating communities is based on two-way communication

Creating communities is based upon two-way communication. This essential concept is sometimes difficult for old-line marketers to accept. While staid, read-only Web pages will continue to provide a wealth of information, it is the dynamic exchange of ideas that come from concerned constituents—say those who have a certain type of brain tumor or who are fighting to control their diabetes—that gives relevance and life to a site.

Organizations, whether hospitals, physician practices, or vendors of physician practice solutions or electronic medical records, must open their sites to the free exchange of ideas if they are to be relevant in the lives of their users. For software vendors this might mean your users having the chance to grouse about features and learn from other users how to do work-arounds. For hospital or physician Web sites it might mean supporting the exchange of ideas as patients talk about the misery of chemotherapy and how best to survive it.

In the Airfoil white paper [A Fractured New Universe with Thousands of Stars](#) we explore the power of giving constituencies the tools they need to build communities because where there is community there is loyalty.

All of this is part of enhancing the value of intangibles, examined in our Airfoil white paper [From Message to Money](#), which quotes the author James Wilkinson writing in The Economist that “The value of a business increasingly lurks not in physical and financial assets that are on the balance sheet, but in intangibles.”

A spectrum of tools—from e-mail and Web sites, to instant messaging and blogs—exists to precisely target and deliver effective communications and to unite people with common goals into communities. These are effective tools; but like all tools, they must be used with skill, and they must be used with deep knowledge of the problem you are seeking to solve.

Understanding the challenges facing the healthcare industry, and knowing how to use the tools to best communicate your solution to those who will benefit from what you’ve created, is the path to success. The challenges of healthcare translate into opportunities. And the opportunities are best realized when an organization can position itself at the intersection of technology and customer needs.

Sidebar: Communicating At the Speed of Light

The word-of-mouth credibility that used to eke its way across back fences, phone lines and party circuits now spreads at electronic speed through Web sites, e-mail, blogs, text messages and video spots delivered to smart phones.

The emergence of social networks has produced special opportunities for communicators who invest the time to participate in, or at least monitor, social networking sites. In our Airfoil white paper [What In the World is Web 2.0?](#) we recommend that companies take these steps to plant their flag in this virtual territory:

- Executives should create business-oriented profiles on LinkedIn and similar sites that enable them to link to associates, associates of associates, and associates of associates of associates, shortening the contact process for new partnerships and customers.
- Submit your company domain to Facebook so that it can be designated as a “group” enabling your employees, partners and customers alike to network among each other.
- Create a corporate presence on MySpace where other online visitors can learn about your innovations and your offerings.
- On these sites, join in the local online groups that relate to your interests or your market, or create a new group that will draw individuals facing common issues (avoid commercialization, however). List products or job openings in the marketplace sections of these social-networking sites.
- Monitor and participate within your social-network site domain. It does no good to “open your door” if you don’t talk to the potential customers. You’ll also want to know if your company is the subject of negative (or positive) conversation.
- Likewise, monitor replies to blogs you post in your social network space so you can strike up conversations with supporters and, even more important, be responsive to those with a gripe or a question.
- Remember that it’s a two-way medium, so you should consider your comments or postings thoughtfully before you issue them. Every comment or opinion you express is subject to responses, contradiction or —preferably — support from an often unseen world of influencers.
- Finesse, courtesy and a thorough understanding of your target audience are crucial to communicating and building your brand, reputation and credibility in the niches that you seek to influence.