Capgemini

Telehealth: A journey to becoming the next disrupter in healthcare
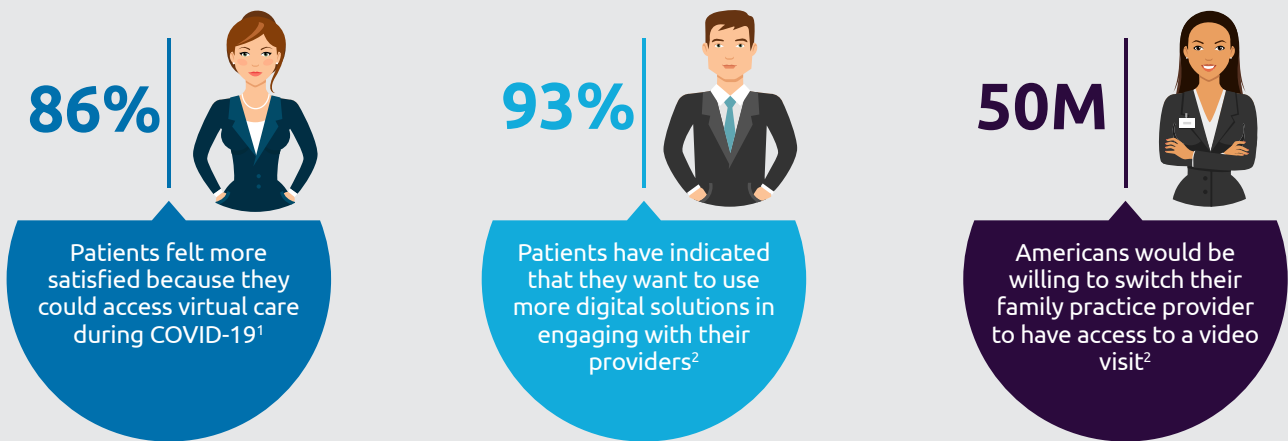
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Executive summary

The onset of the COVID-19 pandemic has accelerated the healthcare industry to take a quantum leap from where it was just a year ago. Out of necessity in this "new normal", innovations that we thought would have taken three to five years to develop, have been brought live to the market within a few months.

Telehealth is one burgeoning area that the industry has always wanted to focus on but has not really thought much about. With a focus mostly on video/telephonic-type activities and those that are highly transactional, we have not tapped into the new opportunities that telehealth presents and that our members are looking for. From areas such as home health to tests and proactive engagement, there is a lot that telehealth can do for us today. Our journey in this space has just begun, and there is a lot more to look forward to. This paper talks about where we can go next in the telehealth space once we have conquered the basics.
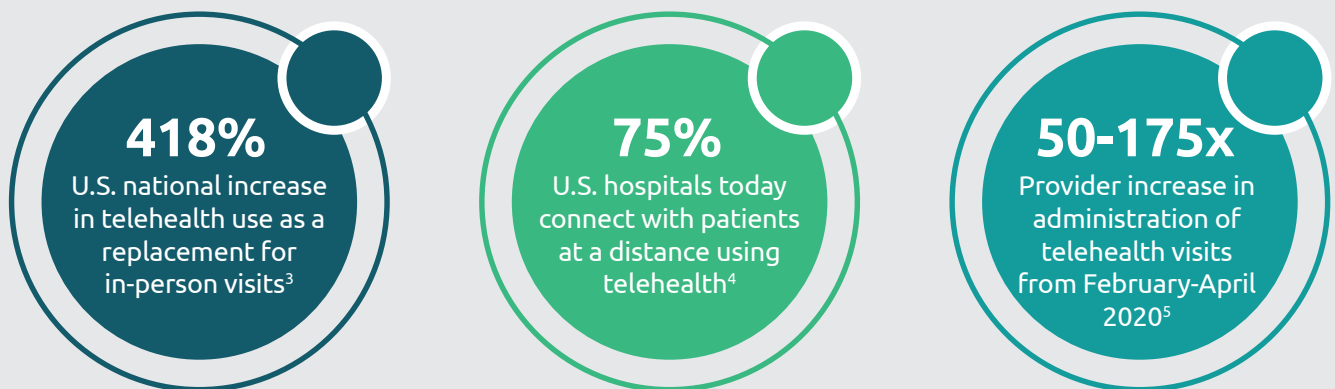
Telehealth helps improve member experience

For select conditions and care needs, telehealth offers patients and members the opportunity to engage digitally with their payers and providers, including checking in with providers over mobile, making appointments with reduced lead times, and accessing their electronic health record from remote applications.

86%

Patients felt more satisfied because they could access virtual care during COVID-19[1]

93%

Patients have indicated that they want to use more digital solutions in engaging with their providers[2]

50M

Americans would be willing to switch their family practice provider to have access to a video visit[2]

Telehealth helps expand access to care

Telehealth also helps expand access to care, especially for those who live in rural areas and during times like the COVID-19 outbreak. People are able to receive many benefits of medical care via digital participation.

418%
U.S. national increase in telehealth use as a replacement for in-person visits[3]

75%
U.S. hospitals today connect with patients at a distance using telehealth[4]

50-175x
Provider increase in administration of telehealth visits from February-April 2020[5]

Sources: 1. Becker Hospital Review, 2015; 2. Healthcare IT News; 3. American Hospital Association; 4. Ibid; 5. Healthcare Innovation; 6. Ortholive; 7. Healthleaders; 8. Amwell

Telehealth helps reduce costs of care

Remote medical services can help reduce overall healthcare costs and allow medical professionals to accomplish more with reduced in-person visits.
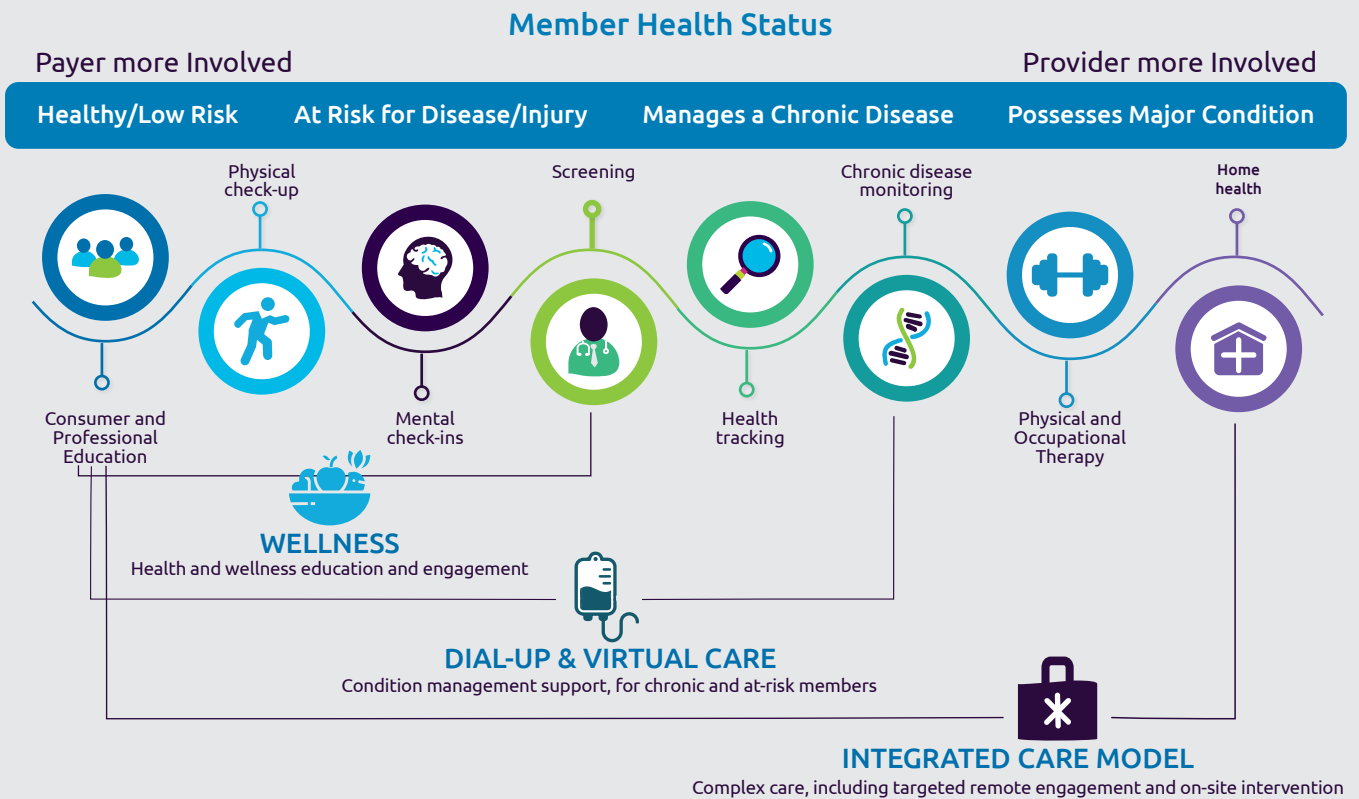
$1500
Potential cost savings for providers for each avoided hospital visit using digital solutions[6]

$19-121
Estimated savings per telehealth visit for members or payers[7]

$6B
Estimated annual savings in U.S. healthcare costs from telehealth[8]
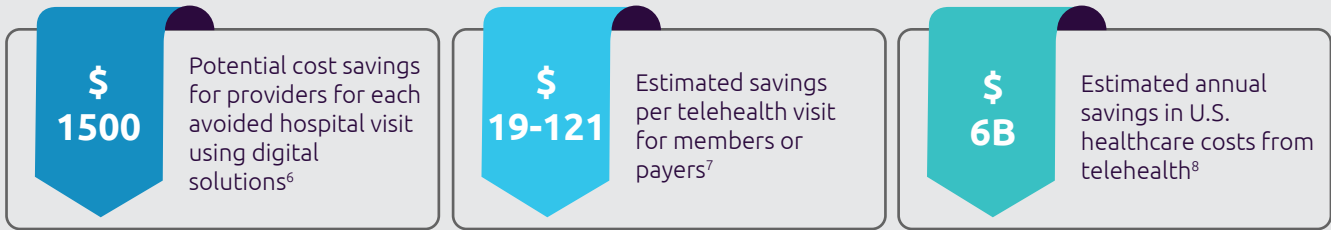
Overview of telehealth
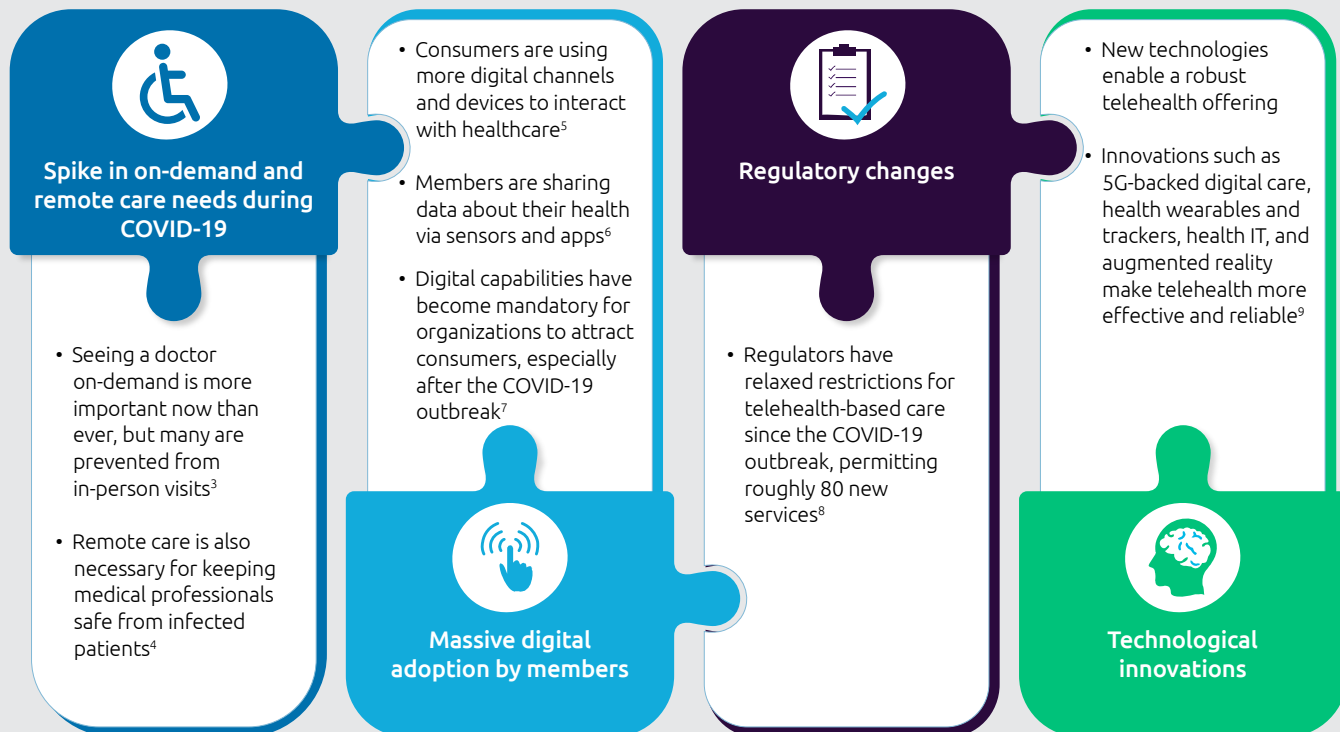
Telehealth and telemedicine

Telehealth and telemedicine are often used interchangeably, but they don't always mean the same thing. Telemedicine is a category within telehealth, specifically referring to clinical services that are administered remotely. Telehealth is a broader term, referring to the use of telecommunications and digital communication technologies to support any health-related services, including those that are non-clinical. It allows long-distance patient and clinician contact, medical care, advice, intervention, monitoring, provider and patient education, self-care, and more[1].

In addition to being a tactical solution, telehealth powers a comprehensive, customer-focused model of healthcare[2]:

Member Health Status

Payer more Involved   Provider more Involved

| Healthy/Low Risk | At Risk for Disease/Injury | Manages a Chronic Disease | Possesses Major Condition |

Physical check-up

Screening

Chronic disease monitoring

Home health

Consumer and Professional Education

Mental check-ins

Health tracking

Physical and Occupational Therapy

WELLNESS
Health and wellness education and engagement

DIAL-UP & VIRTUAL CARE
Condition management support, for chronic and at-risk members

INTEGRATED CARE MODEL
Complex care, including targeted remote engagement and on-site intervention

Why is telehealth use on the rise?

Spike in on-demand and remote care needs during COVID-19

- Seeing a doctor on-demand is more important now than ever, but many are prevented from in-person visits[3]
- Remote care is also necessary for keeping medical professionals safe from infected patients[4]

Massive digital adoption by members

- Consumers are using more digital channels and devices to interact with healthcare[5]
- Members are sharing data about their health via sensors and apps[6]
- Digital capabilities have become mandatory for organizations to attract consumers, especially after the COVID-19 outbreak[7]

Regulatory changes

- Regulators have relaxed restrictions for telehealth-based care since the COVID-19 outbreak, permitting roughly 80 new services[8]

Technological innovations

- New technologies enable a robust telehealth offering
- Innovations such as 5G-backed digital care, health wearables and trackers, health IT, and augmented reality make telehealth more effective and reliable[9]

Challenges and mitigation strategies to adopt telehealth

Even though telehealth can help reduce many healthcare hurdles today, it has faced numerous obstacles to its adoption and use. Below, we summarized some common challenges that impede organizations from adopting telehealth and identified corresponding mitigation strategies to address those barriers.

OBSTACLES

MIGITATION STRATEGIES

ACCESS
- Many Americans lack access to high-speed internet or telehealth services, especially in low-income and rural areas.
- Many also find it difficult to use telehealth tools

- Offer services that decrease reliance on video chat
- Release telehealth education materials and tutorials to ensure members maximize their remote care experience

COST
- Certain telehealth tools have proven too costly to implement, and the benefits of many tools are unproven

- Apply cost savings through telehealth transition to implement self-funded transformation and target technologies with proven financial success

REGULATION
- Despite recent flexibility, regulations still pose a barrier to telehealth adoption, e.g., coverage for mental health, licensing requirements for physicians in each state of practice, and reimbursement policies

- Embrace compliance as a strategic pillar, offering and developing capabilities in line with government regulation
- Continue to lobby for nationalization of telehealth licenses

SECURITY
- Integration of telecommunication with clinical information exposes medical systems to new vulnerabilities

- Incorporate cybersecurity as a pillar to your telehealth adoption strategy

SUPPLY & DEMAND
- Rapid demand increase is exceeding clinician capacity and know-how
- Staffing adjustments such as employee reeducation and new IT needs cost time and money

- Understand and manage member demand to avoid shortage of technology supply
- Establish remote care professionals devoted exclusively to telehealth, and appoint program management to ease change

Market's focus on telehealth today

Most of focus on telehealth today is around virtual video capability. More than 90% of healthcare organizations that have adopted a telehealth solution during COVID-19 chose to partner with video conferencing vendors such as Doxy.me and Zoom[1]. Tele-visits have seen the highest growth in the past few years among all telehealth services[2]. However, we believe that organizations should also focus on other modalities of telehealth such as:

- Remote patient monitoring for health or chronical conditions through medical devices, wearables or home monitors
- "Store and forward" technology where messages, images or data are collected and shared securely
- Mobile health (mHealth) to get general education and communication, keep track of health, help better manage chronical conditions or pursue fitness goals

Where and how to best deploy telehealth

Telehealth as an emerging model of care can be deployed towards a variety of innovative solutions. Below are what we think the most relevant solutions that telehealth can provide to meet the needs of members and health payers.

Maintaining the trust and comfort of an in-person visit

Build powerful, secure, and intuitive channels of communication from provider to patient. Share guidance and medical information in real time and make follow-up information available in a friendly format for patients with provider's assessment and instructions.

Moving beyond synchronous visits to digital monitoring

Payers and providers can co-own mobile apps to connect patients with their physician's office for updates, questions and guidance. Patients can stay connected to broader participants in the health and wellness ecosystem with tips, check-up reminders, and new services.

Leveraging IoT to collect patient data

Leverage advanced analytics and patient data from IoT sources to construct a data platform that can anticipate patient needs and seasonal outbreaks. Monitor patient conditions remotely with medical devices that transport the patient information to provider.

Examples of telehealth applications

Many payer and providers today have enabled delivery of telehealth services to members through a combination of partnerships with third – parties, in-house development, and telehealth investments.

Humana

Humana has partnered with Seniorlink to connect seniors with Humana at home care team through Seniorlink's platform to improve communication and care management

MAYO CLINIC

Mayo Clinic has expanded its telehealth offerings to use video monitors and advanced technology that allow specialists to remotely monitor ICU patients

KAISER PERMANENTE

Kaiser Permanente has invested in telehealth solutions that help resolve behavioral health deficiencies, such as the mental health therapy rooms with advanced technology for video conferencing and consultations

How Capgemini can support your telehealth journey

We will first help you build a robust and comprehensive telehealth strategy

Identify opportunities
Assess the telehealth capabilities that have the capacity to deliver the greatest impact to members and stakeholders in the short, medium, and long term. Prioritize efforts to deliver value continuously.

Align people, processes, and technology
Assess telehealth capabilities that have the capacity to deliver the greatest impact to members and stakeholders in the short, medium, and long term. Prioritize efforts to deliver value continuously.
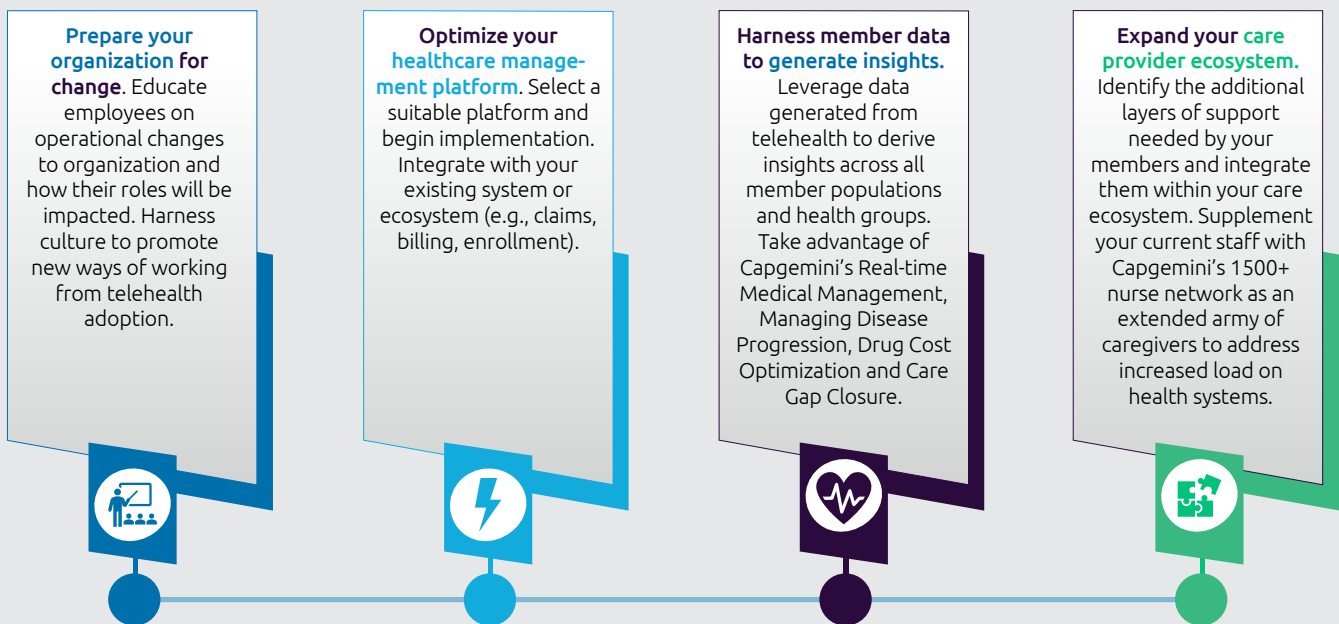
Build a business case
Construct a business case for key stakeholders that communicates the benefits of telehealth. Track these benefits throughout the telehealth roll-out with KPIs.

Develop an impactful prototype
Build a Minimum Viable Product (MVP) in a short timespan that showcases the ability to deliver continuously on intended benefits with more complex telehealth products and services.

Other areas where we can help you begin or continue the telehealth journey

Prepare your organization for change. Educate employees on operational changes to organization and how their roles will be impacted. Harness culture to promote new ways of working from telehealth adoption.

Optimize your healthcare management platform. Select a suitable platform and begin implementation. Integrate with your existing system or ecosystem (e.g., claims, billing, enrollment).

Harness member data to generate insights. Leverage data generated from telehealth to derive insights across all member populations and health groups. Take advantage of Capgemini's Real-time Medical Management, Managing Disease Progression, Drug Cost Optimization and Care Gap Closure.

Expand your care provider ecosystem. Identify the additional layers of support needed by your members and integrate them within your care ecosystem. Supplement your current staff with Capgemini's 1500+ nurse network as an extended army of caregivers to address increased load on health systems.

Contributors

Milind Shah
Healthcare Leader, Capgemini Invent

Milind Shah is recognized as an innovator in the healthcare industry with a 20-plus+ year track record of success, working with organizations of different sizes from startups to large Fortune 50 companies. He helps them with 3–5-year strategic plans and think about new business models and growth opportunities with concepts like Design, Innovation, and Strategy.

Recently, he has been working with an organization in the healthcare space at an executive level to help them think differently about things such as member engagement, value-based care, closing gaps in care, disease/care management, wellness/well-being, telehealth, and several other initiatives as the organization starts to think about getting closer to their customers and enabling solutions focusing on overall value delivered to members.

Danlin Huang
Consultant, Capgemini Invent

Danlin is part of the Brand & Experience practice at Capgemini Invent. She has helped organizations innovate and develop solutions to address rapidly changing markets by rethinking their customer experience strategies and assessing marketing technology and capabilities. Over the course of her career at Capgemini, Danlin has worked on multiple healthcare projects, helping health payers reimagine and implement technologies to transform members' digital experience. She also has gained considerable knowledge of the health insurance industry through Capgemini's internal thought leadership initiatives and has expertise in Agile development. Danlin holds a Bachelors of Arts (BA) in Economics and Italian Studies from University of California, Berkeley.

About
Capgemini

Capgemini is a global leader in consulting, digital transformation, technology and engineering services. The Group is at the forefront of innovation to address the entire breadth of clients' opportunities in the evolving world of cloud, digital and platforms.

Building on its strong 50-year+ heritage and deep industry-specific expertise, Capgemini enables organizations to realize their business ambitions through an array of services from strategy to operations. Capgemini is driven by the conviction that the business value of technology comes from and through people. Today, it is a multicultural company of 270,000 team members in almost 50 countries. With Altran, the Group reported 2019 combined revenues of €17billion.

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