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Boundaryless access:
Beyond the digital front door

Access points to healthcare are increasing, but they restrict what consumers need: boundaryless experiences that empower people's lifelong pursuit of health and well-being on their own terms, at their own pace. Tomorrow's healthcare experience will be built by patients tailoring their own experience according to their own unique health needs.

What's going on

Health and life sciences organizations are vying for the attention of consumers seeking to explore options, access care and manage health in their own daily lives at a time when COVID-19 has accelerated the shift to virtual experiences.

But as healthcare players battle to become the true gateway for care, the explosion of "digital front doors" has created an experience problem.

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Many doors have led to fragmented experiences. Critical context and transparency for why choices are relevant and what to expect are in short supply. Most importantly, the numerous doors that now exist are just what they sound like—individual, siloed points of access. They fail to account for the end-to-end health experience, and this has left patients on their own to navigate an ecosystem which is increasingly confusing.

The stakes are high. As the digital health platform battles heat up, people are switching to new ways of accessing care and embracing new health financing and care models that shake up how, when and where they receive and pay for care.

With almost half a million health-related apps now available,[1] managing health has become not only more accessible and convenient, but also more fragmented and complex. Patients and HCPs alike must make sense of a vast array of options, yet there is no easy way to connect experiences, share insights and partner on pursuits.

What's next

Tomorrow's healthcare experience will be driven by empowering patients to build their own experiences based on their unique health needs. Instead of being forced to stay within a health system or lose access to their patient record after switching providers, a patient will be able to move around and easily take their information with them.

Now is the time for health and life sciences organizations to rethink the role each experience plays in a world where digital-first consumerism is the norm. Accepting that patients will take control of their own health journeys will enable forward progress across channels, partners and even how we view healthcare.

The next frontier will be patient-driven curation of health products and services. Health journeys—and, in particular, primary care services—will be unbundled and reimagined.[2] As this happens, the patient relationship will inspire meaningful engagement and deliver transparent value. This will lead to more equitable, affordable and effective outcomes.
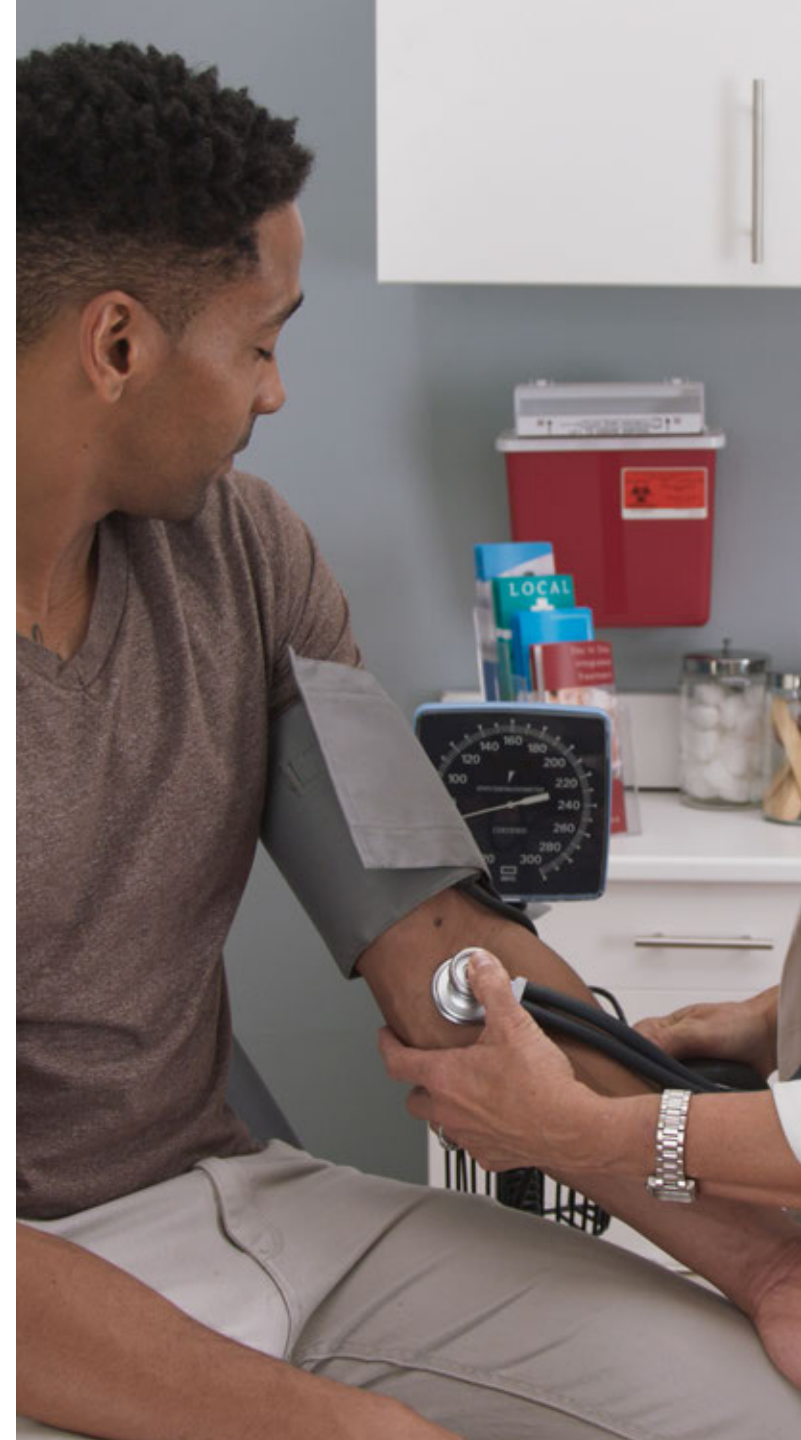
Opportunities for reimagination

1. The great unbundling

As platforms mature, alternative paths to build, buy or partner to enable capabilities and connect to consumers are emerging. The right model depends on where organizations want to play, where they believe their patients will most likely engage and whether they have the "right to win" across moments of the health journey.

Tomorrow's health experience must involve guidance across the end-to-end health journey and be unbundled into bite-size, modular experiences that can be accessed and used in a variety of ways to meet the needs of many different people—both within and outside the organization's control.

In finance, financial innovators are finding new ways to meaningfully engage across digital and physical channels that health and life sciences organizations can learn from.

The brick-and-mortar bank teller experience was not replaced with video visits, for example. Instead, the journey was reimagined to offer the right experience to the right person at the right time and place. Innovations included a range of paying for things with a wave, tap or text to receiving message-based financial advice and collaborating with financial planners with a holistic view of all your funds.

Digital Experience Models—A Primer

	Invisible Actions	Mini Flows	Singular Experiences	Super Systems
Why it's valuable	Enables frictionless experiences by streamlining consent for automated actions	Embeds simple tasks with clear outcomes inside larger, outside experiences	Focuses on a single user purpose and clearly articulated value proposition	An ecosystem of many services and offerings that satisfy everyday purposes, like an OS
Works like	WeChat Pay by Tencent	WeChat Mini Programs by Tencent	League of Legends by Tencent/Riot Games	WeChat by Tencent
Best for	Small Payments Identity Verification	Quick Health Assessments Appointment Scheduling	Therapy Programs Health Manager	Marketplace Community

The great unbundling allows for new combinations of purpose-built experiences with digital-first entry points that focus on convenient access, credible decision support and compassionate engagement.

By moving beyond the digital front door and reimagining how we entice, enter, engage, exit and extend health and well-being experiences, organizations can unlock new possibilities to drive loyalty and growth, reduce costs and delays, and improve health outcomes.

China's WeChat—the messaging, social media and mobile payment app owned by Tencent—is becoming the front door to Chinese health.[3]

Before COVID-19, WeChat made 24,000 health-and-wellness-related Mini Programs (MPs) available, ranging from appointment booking to telehealth, personal health records management and crowd-funded health insurance. In response to the pandemic, a tracking app embedded in WeChat provided health status codes to track exposures;[4] those codes are now being used by nearly 1 billion people and been shown more than 9 billion times.[5]

2. A new path forward

People are hungrier than ever for healthcare information. In the U.S., almost 80% of consumers are now going online to learn about care, and 65% are sharing information they find online with their HCPs.[6]

Challengers are rushing to fill gaps in care access in different ways. Take Google's extending the health-related search experience to make it easier to book and share information with clinicians.[7] Another example is Teledoc-Livongo's integrating triage, telehealth and remote monitoring experiences to enable one-stop digital-first healing.[8]

Yet while new digital health solutions have rushed to offer more digital doors and health solutions, few are integrated in meaningful ways, resulting in greater fragmentation and complexity. Long waits, ineffective care interventions and poorly coordinated handoffs are effectively creating dead ends, and at-risk individuals and communities are disproportionately affected.

All too often, many health encounters leave patients without a clear path forward. From finding care that meets their needs to understanding care options, receiving medication reminders or sticking with a care plan, people need help progressing along non-linear journeys.

New context-driven health pathways need a guide always pointing people toward the next best experience, proactively and on-demand.

Key moments hold outsized impact in driving better access, affordability, service and outcomes—and future leaders will get them right. As digital front doors give way to digital health experience platforms, those able to gain consumer attention and trust will be best positioned to guide consumers to the right health and well-being products and services, delivering functionality that unlocks meaningful value across the end-to-end health journey.

To achieve this, organizations must adopt a platform and ecosystem mindset.[9] They will also need to embrace purposeful partnerships. Such a broader approach will allow the natural shift from transactional encounters to a series of connected, meaningful interactions.

Ingredients for Eliminating Dead-Ends

	Attractive Audiences	Meaningful Matchmaking	Influential Incentives	Brilliant Basics
Why it's valuable	Gain attention and build trust and loyalty with consumers (patients, member, families and informal caregivers) and product and service providers (clinicians, staff, solution partners)	Connect the right health and wellbeing products and services (education, advice, consults, diagnoses, procedures, treatments) with the right consumer at the right level of guidance and control	Establish business rules that incent positive behaviors (e.g., medication adherence), govern engagement, optimize usage and orchestrate curation, typically through automated technology solutions	Essential ingredients that unlock better ways to exchange value by seamlessly and conveniently enabling forward momentum (referring, consenting, data sharing, scheduling, paying, tracking)

3. Make it personal

Health is inherently personal, and technology challengers excel at understanding behaviors, motivations, personalities and social context to drive adoption and engagement—ultimately expressing and delivering value in personally relevant ways.

Researchers have shown the impact these behavioral "phenotypes" can have on the effectiveness of health interventions in sustaining behavior change.[10] The upshot is that, as patients aren't one-size-fits-all, healthcare experiences shouldn't be either.

With greater interoperability expected, health organizations must continuously improve their ability to engage and motivate, connect to the right possibilities and remain relevant throughout a lifetime of transitions, goals and needs to maintain or gain competitive advantage.

Already, consumers are relying less on primary care physicians and more on digital technology.[11] As this trend continues, stitching together a series of connected interactions across a single health journey or a lifetime of health and well-being pursuits will require clean, well-structured and easily consumable data from a variety of clinical and nonclinical sources.

A longitudinal record will enable more-personalized, precise health experiences by informing context-driven recommendations. This will lead to more-tailored interventions designed to maximize effectiveness. It will also empower people to manage all their health activities in the moment and across their lifetime through a persistent, progressive and portable digital health experience platform.

What healthcare leaders can do next

1. Reimagine, don't replicate

When competing for the lifelong patient relationship, organizations often focus on merely replacing a patient's analog experience—calling to schedule an appointment, for example—with a digital one.

The new boundaryless experience, with its complexities and elevated consumer expectations, will require reimagination, not replication, however.

Organizations must start by understanding patient behavior, motivations and needs, then determining where to play and how to show up. Next, the focus will need to shift to answering how to orchestrate capabilities and help with ecosystem navigation across prioritized experience areas.

2. Adopt a platform mindset and data wealth

An organization's experience strategy to sustain a lifelong patient relationship should be crafted with a platform mindset.

From purposeful partnerships and ecosystems to open data and APIs, organizations must be prepared to compete in the platform economy as platform-based business models have changed the way we live, work and receive care.

Organizations must define how they participate in emerging industry platforms or create and operate a new platform. The role each organization can play must be carefully considered as there are clear advantages in participating in certain ecosystems and intentionally opting out of others.

Rich, valuable data—along with clinical, technical and experience capabilities—will be key ingredients to enabling an organization's platform ambitions and building a competitive advantage.

It's important to remember, however, that becoming a "data-wealthy" organization isn't about collecting large volumes of data. Rather, it's about deciphering what data is truly valuable and then using it to develop insights across moments that matter.

3. Focus on building (and sustaining) relationships

Healthcare is lifelong. This means organizations need to have the capabilities to understand how patients' needs evolve over time and when and how to meaningfully show up across different life events.

Begin by auditing what you know about your patients and how that information is collected, stored and used.

Does that information allow you to build a behavioral phenotype of a patient that can then be used to predict how to tailor information so it provides a better experience? If not, identify the gaps and opportunities to collect personality characteristics that could, with patients' permission, be used in the future to identify behavioral phenotypes and help with target health interventions.
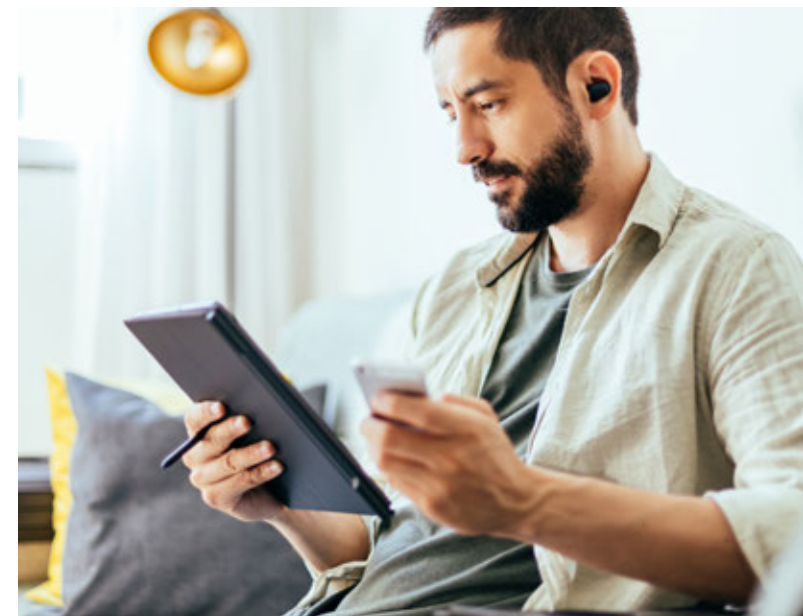
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