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POV: VIRTUAL CARE PLAYBOOK

SUMMER 2020



What we're seeing today

An exponential shift in the delivery of care

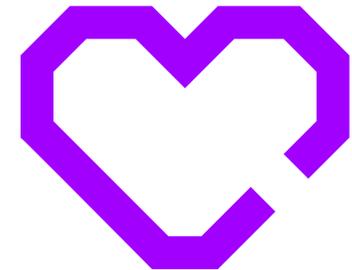
Virtual care at scale in Canada has been thrust into reality due to COVID-19, with many providers shifting their operations exclusively to virtual care overnight.

Prior to this monumental shift, virtual care delivery was piecemeal and typically based on specific clinical needs – patient access to virtual care (primary or specialist care) was not the standard of care.

In parallel, expectations around convenience and access from other areas of patient's daily lives resulted in a groundswell of direct to consumer virtual care offerings.

Today, across Canada, we have a varied landscape of direct to consumer virtual care offerings, provincially delivered virtual care solutions and employer benefits plans that offer supplemental access to virtual care.

To add to that complexity, there are hundreds of technology solutions that evolve, enter and leave the virtual care marketplace daily.



Considering what's next

Maintaining the shift beyond immediate needs

Despite this varied and complex landscape, a shift toward virtual models of care as part of routine care is a shift that must be maintained beyond the immediate needs presented by COVID-19.

While virtual care cannot and should not replace all forms of care, there are well known and established use cases for which the use of virtual care tools improves patient and provider experience, improves access to care and can reduce operating model costs for health systems.

Providers and health systems alike recognize this need for sustained virtual care and *citizens are demanding it.*

To deliver on this shift, there are several key needs:

1

RAPID RESPONSE

Health systems and care providers need to quickly deploy and deliver easy to use virtual care solutions that respond to patients' and providers' immediate needs.

2

LONGER-TERM SCALE

We must ensure virtual care is scalable as it becomes routine care. This emphasizes the need for stable and effective virtual care solutions and partnerships.

3

A HUMAN LENS

Delivery of virtual care goes beyond technology – it relies on the people and processes that wrap around solutions. Creating and supporting these operating models and longer-term strategies is a critical success factor.

Landscape Overview

Examples of the **categories of tools that deliver and support virtual care**



VIRTUAL CARE PLATFORMS:

Clinic management and communications platforms, connecting patients to *their* care provider via video and/or asynchronous messaging (e.g. Medeo, Novari, Think Research etc.)



VIRTUAL WALK-IN:

Direct to consumer, out of pocket or extended insurance coverage to access services which connect patients to any care provider that is available who meets the patient's needs (e.g. Maple, Babylon, EQcare etc.)



REMOTE MONITORING:

Tools and platforms that allow for the remote collection of biometric information (e.g. CloudDX, Telus Health etc.)



ENTERPRISE COLLABORATION:

Tools that have historically been used for workplace collaboration now being used to facilitate virtual care (e.g. Microsoft Teams, Zoom etc.)

The New World of Care Delivery

What we've heard in Canada and globally

Pain Point

We don't have enough time

- Organizations are under tremendous strain to meet immediate clinical needs of patients and to support providers.
- Little time to understand virtual care market offerings & whether solutions meet their needs.
- Rushed procurement exercises that have resulted in technology procurements that likely won't meet longer term needs.

Desired Solution

Consolidation of key information about VC solutions would be helpful in gaining a better marketplace understanding, faster.

Pain Point

We don't have the information

- It is unclear how virtual care solutions will fit into existing technology architecture.
- Requirement to robustly assess solutions' technical architecture, compliance, capacity to address stated needs, upfront and ongoing costs, ongoing support service capacity etc.
- Want to understand if the solution is being used successfully elsewhere.

Desired Solution

Assessment of technology using an established framework methodology would support organizations in making more appropriate choices for technologies and partners.

Pain Point

How do we sustain this change?

- It has taken a monumental amount of effort at the health system and organizational levels to deliver rapid access to virtual care.
- Now that things are plateauing, attention is shifting to sustaining models of virtual care.
- Many organization may have never implemented large scale virtual care technology that has implications for clinical and operating models.

Desired Solution

Development of a plan for "post-COVID" virtual care operations, maintenance, and service expansion for ongoing success.

VIRTUAL CARE

**Addressing immediate needs
and planning for the future**



What could your Virtual Playbook look like?

Accenture's end to end support is aligned with health provider needs and is built on decades of vendor agnostic strategy, integration and implementation expertise – we support you to:



GET WHERE YOU WANT TO GO – DEVELOP THE PLAN

Define your needs, priorities, vision, scope and implementation roadmap for virtual care.

Virtual Care Strategy Toolbox

Accenture's established assets and methodologies for VC strategy & impact, governance & operating models, human insights and concept prototyping will enable your guiding strategy for the long-term virtual care journey.



MAKE THE RIGHT CHOICE – ESTABLISH A FRAMEWORK

Understand the virtual care marketplace offerings and partnership opportunities.

Virtual Care Vendor Selection Framework

Think about using robust vendor assessment and selection tools which consider your integration needs along with existing vendor screenings, we help you make faster decisions making for solution and partnership selection.



ENSURE SUCCESS – OPERATE, SCALE & SUSTAIN

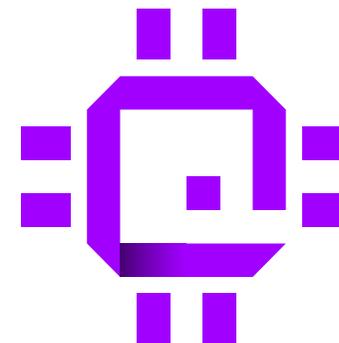
Pivot your clinical and operating models & scale to appropriate clinical areas.

Virtual Care Implementation & Operations Support

With our proven capabilities to rapidly implement transformative technology, then scale operations to the right level of support, we empower you to sustain and scale your virtual care program.

What we're seeing today

Choosing the right technology partners and considering your user needs are critical to your long term success



PRIORITIZE

- **User needs:** Engage your users. Failing to meet the core needs of your primary users will result in poor technology uptake – user needs should be your North Star.
- **Minimal viable product mindset:** Try to answer – what do I need today to meet the single most important needs?
- **Looking under the hood:** Understanding the true technology and service offering and the prior successes (or failures) of the solution.

AVOID

- **Being drawn in by bells & whistles:** Think about what you need to accomplish your goals and list those core needs for short and longer-term success.
- **Solving all problems for all people:** Technology platforms have many capabilities, avoid temptation to do all things on day one.
- **Interoperability fumbles:** Longer term considerations need to be kept in your sights – avoid technology that doesn't work with your existing architecture.

The Future

Using **virtual care as your jumping off point** toward larger transformation

By establishing a solid foundation for virtual care, you're paving the way for integrated care, improved patient and provider experiences and health system efficiency more broadly.

There is significant opportunity for change and we should be asking how might we create transformative outcomes for our health systems through virtual care by...



Leveraging investment in virtual care to address challenges in clinical data and act on population health management



Layering in other technology to create even greater return on investment (e.g. RPA & AI)



Expanding virtual care's reach into other verticals within health care to support efficiency and sustainability needs



Creating a centre of excellence within your organization to scale learnings and achieve economies of scale for investments by supporting other parts of the health system



Creating research and innovation opportunities that support new economies and growth opportunities

AUTHORS



JIMMY YANG

Managing Director, Strategy & Consulting,
Health
Accenture Canada

 Jimmy.Yang@Accenture.com

 [@realjimmyyang](https://twitter.com/realjimmyyang)

 www.linkedin.com/in/jimmysyang/



SHANNON MACDONALD

Managing Director, Health & Public Service
Accenture Canada

 Shannon.Macdonald@Accenture.com

 [@shannonmac_don](https://twitter.com/shannonmac_don)

 www.linkedin.com/in/shannon-macdonald-847a383/

CONTRIBUTORS

Bailey Griffin

Mitt Korot

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