



# Health's NewFuture for Technology

Navigating the human and  
business impact of COVID-19

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**COVID-19 has become a global crisis, evolving at unprecedented speed and scale. As a result, health leaders are facing a new future.**

The priority is to protect the health and safety of people, including in their workplaces. Business leaders should make rapid decisions and take immediate actions in order to protect and support their workers while ensuring that critical business operations continue.

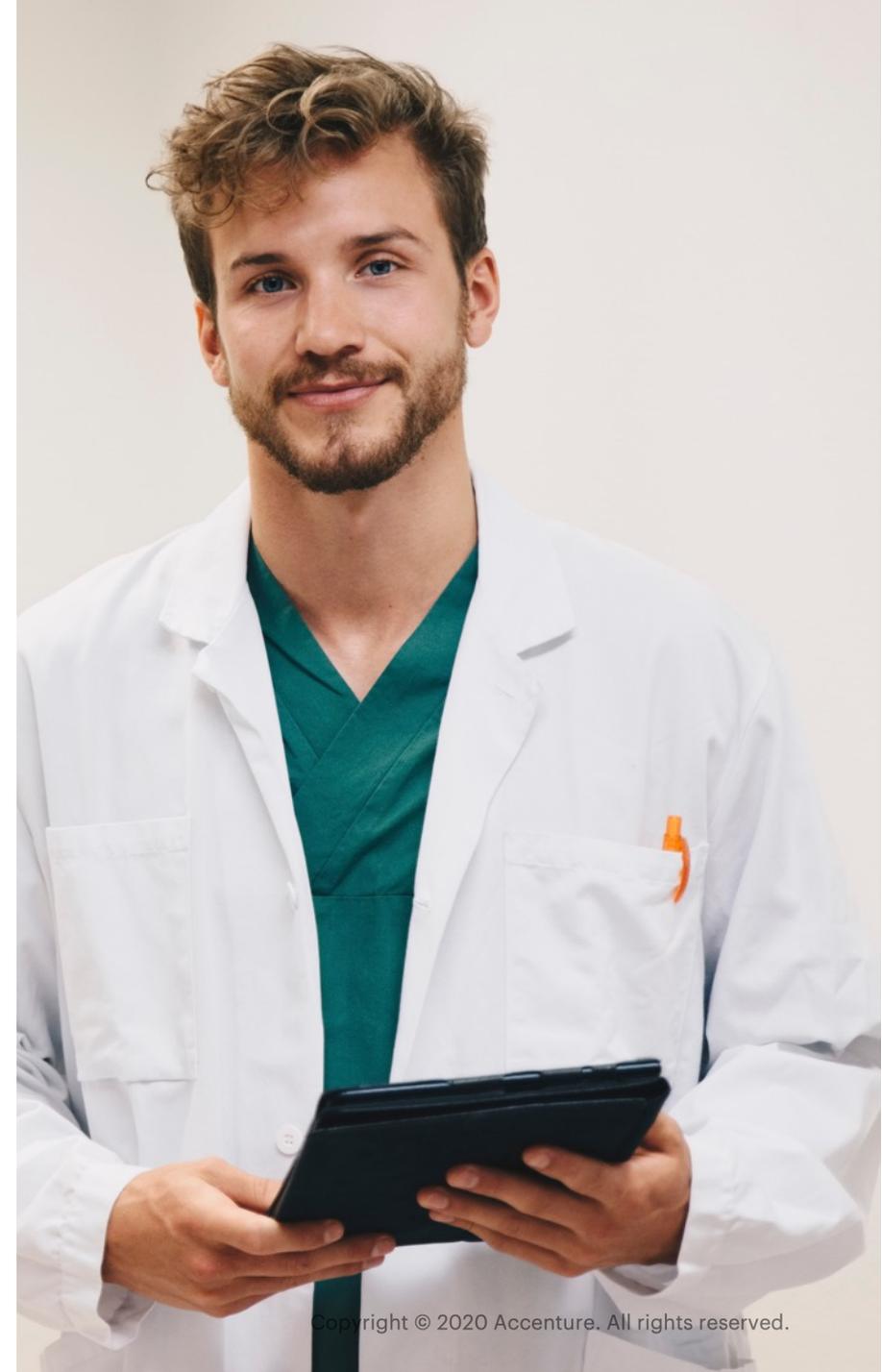
# The criticality of technology in healthcare has never been more apparent

**Technology underpins healthcare's response to COVID-19, driving the ability to help:**

- Securely and quickly mobilize a virtual workforce
- Enable virtual care, telemedicine and home care solutions
- Quickly reflect changes in benefits and regulations
- Accelerate distribution of critical supplies
- Automate manual call center processes to redirect workforce to focus on strategic initiatives

The speed and volume at which technology is being utilized is highlighting both our dependency on technology and the vulnerabilities of current health solutions.

The following highlights Accenture's perspective on where health leaders should focus and how they can take action now, next and in the future.



# How healthcare is changing

## Care: new interwoven digital and physical experiences, with increased expectations, for effective, trusted and reliable care at a distance

- Mandatory physical distancing has increased usage of virtual care, remote diagnostics, telemedicine, and home health solutions, positioning **virtual care as part of the new future**.

## Society: increased linkage between care and community to rebuild trust

- **New external reporting requirements**, combined with **new sources of information**, can add pressure to already complex legacy data environments.

## Work: rising need for an elastic workforce to address new demands

- The **shift to working from home** or working in new surge locations (e.g. schools), requires equipping the workforce with remote solutions now, with an expectation that there will be a shift to a higher percentage of work taking place virtually even after the crisis.
- The increase in remote work is driving an **unprecedented increase in phishing attacks**, in addition to **relaxed security controls in the short term**, that will have to be **unwound in the long term**.

## Foundation: shift to an agile and boundaryless system prepared for evolving needs

- Business continuity and resiliency plans are shining a **spotlight on gaps in dynamic, scalable technology** and sourcing solutions.
- The criticality of technology in the COVID-19 response is presenting an **opportunity for CIOs to elevate their role as a strategic leader of transformation**, but in a world with **heavy financial pressures**.

# Fast facts

**Up to 30 percent** of employees are planning to increase the amount of time they work from home<sup>1</sup>

Phishing emails spiked by over **600 percent** in the first month of the COVID crisis<sup>2</sup>

There is an anticipated **15–20x** increase in virtual visit volume for telehealth providers<sup>3</sup>

Median hospital operating margins fell to **-8 percent** in March, down from 4 percent in February<sup>4</sup>

Commercial insurers may be facing **\$34–251 billion** in unexpected costs<sup>5</sup>

# Technology challenges require immediate and long-term attention

**As COVID-19 creates new healthcare challenges, it reveals unique technology issues that require immediate and long-term attention.**

## **Unprecedented use of immature virtual workforce solutions**

requires the immediate need to grow user knowledge of virtual tools, with potential future challenges in assessing temporary workarounds and managing at-home productivity.

## **Unplanned surge demand requires scaling up technology solutions rapidly**

and descaling once the surge is over. Legacy systems built on less-elegant architectures can limit the use of modern technology and automation techniques, with performance issues potentially impacting business continuity.

## **New and increased security threats,**

due to the expansion in remote work, are exacerbated by the temporary relaxation of some security controls, requiring decentralized, real-time decisions.

## **Rapid decision-making using new sources of information is straining standard platforms, processes and governance,**

and driving a shift to streaming architecture for pandemic analyses.

## **The surge in demand for digital care services**

tests virtual health strategies and the capability to operate at scale; lack of integration of virtual care solutions into core systems can cause complexity in care and reporting.

## **Leaders should balance an emphasis on cost recovery with the increasing demand**

for technology in growth and care strategies. The breadth and complexity of change requires wholesale transformation across strategy, funding, operating models and technology.

# How to respond: prioritize six focus areas



## 1. Enable the virtual workforce

Support the virtual worker with **remote networks, end-user devices, collaboration tools** and **operational support capabilities**



## 2. Scale for extraordinary circumstances

Accelerate **cloud, simplified architecture, automation** and **alternative sourcing solutions** to meet unanticipated demand; consider potential partnerships



## 3. Establish elastic security and compliance

**Advance security** to create elastic solutions and processes that quickly **adapt to changes in regulations**, in times of crisis, while expanding the ability to **protect information outside the four walls** of the company



## 4. Power care and operations with better insight

Activate the organization to **operate with speed and agility**, using data and analytics to inform immediate decisions and **understand critical impacts** to operations



## 5. Enable new digital and virtual care solutions

Enable **virtual care delivery, remote diagnostics, telemedicine** and **digital home health** solutions



## 6. Elevate the role of technology

Look for CIOs to create a true **business continuity partnership** across improved patient outcomes, cost efficiency, and digital-driven growth by positioning as a **strategic, agile leader** that sets the stage for short-term **recovery**, long-term **transformation** and **financial resiliency**

# The now, next and future

**For each focus area, healthcare may need a sequence of actions timed to keeping the lights on “now”, recovering and adapting “next” and planning for transformation in the future.**



## **Now—keep the lights on**

The COVID-19 pandemic is a health and humanitarian crisis and also an economic shock. The immediate focus on technology should be ensuring business continuity, scaling to meet demand, securing information and stabilizing core systems while managing the health and wellness of the IT organization.



## **Next—recover and adapt**

Healthcare should next consider how to recover, and then adapt to changing markets and operations that will likely remain in place once the virus has been brought under control. Health needs to address operational issues caused by interim solutions and build upon digital capabilities resulting from altered consumer habits and civic life.



## **New future—transform capabilities**

As companies move out of recovery, healthcare will likely have the opportunity to transform for resiliency, taking advantage of technology innovation to build an even stronger future. Technology and business should look into partnering for establishing new ways of working and scaling solutions that can be adapted to unanticipated scenarios.

# Set the path for the new future

**Technology as the fuel for efficiency and growth**

**Proliferation of virtual health and virtual working**

**Resilient, scalable, and secure solutions in the cloud**

**Insight-driven agility in care and operations**

## Thrive in the **new future.**

\*For more information on building systems resiliency now and next, please reference Accenture's cross-industry POV [link](#)



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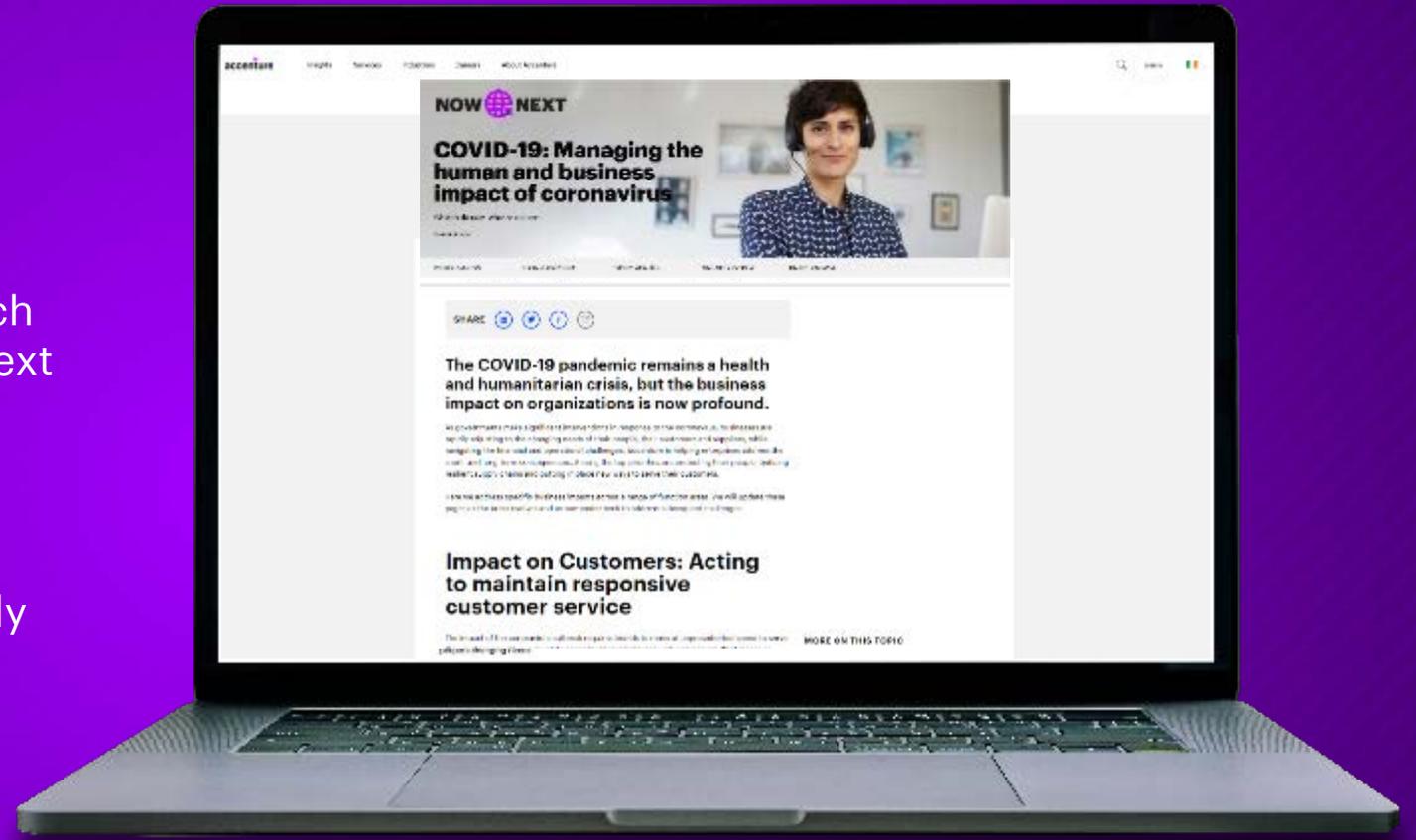
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To help our clients navigate both the human and business impact of COVID-19, we've created a hub of all of our latest thinking on a variety of topics.

Each topic highlights specific actions which can be taken now, and what to consider next as industries move towards a new future.

From leadership essentials to ensuring productivity for your employees and customer service groups to building supply chain resilience and much more, our hub will be constantly updated. Check back regularly for more insights.

[VISIT OUR HUB HERE](#)



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