



FUTURE OF HEALTHCARE

VIDEO TRANSCRIPT

Darryl Gibbings-Isaac:

Hello, and welcome. I'm Darryl. And I call myself a recovering physician. And when I was practicing medicine, there was a satirical saying, trust me, I'm a doctor. Trust was implicit between clinicians and patients. We couldn't do our job without it, and it's ultimately what drove the adoption of healthcare services, in general. Now, I'm no longer practicing, but in my role at Accenture, I'm constantly speaking to clinicians, patients and those across the healthcare ecosystem, such as yourselves. And let me tell you that trust today is as important as it was back then, but of course, circumstances have changed. As you all know, over the last 18 months, there's been an acceleration and deepening of the presence of that third actor in the clinical room—technology. And, ultimately, the degree of trust in that technology will carve the shape of healthcare's future.

Hence, the importance of today's question. Do clinicians have faith in the future of healthcare technology? And, in working to understand the mindset of clinicians, they think of the role of technology in their practice, Accenture surveyed over 300 practicing clinicians across the US, and some of what we've found may surprise you. But the way we're going to go through this is in a true or false exercise, but please feel free to play along and see what your answers are like.

The first of these statements—clinician digital health tool adoption will not revert to pre-pandemic levels. Have a think of whether you think that is true or false? The second—clinicians believe that AI is a threat to their future prosperity. Again, think of whether this is true or false. The third statement—clinicians see value in the business case to invest in AI and digital health. That brings us to the fourth statement—clinicians have trust in the security of health care technology.

So, let's see what our clinicians actually thought. The first statement here—clinician digital health tool adoption will not revert to pre-pandemic levels. I'll tell you here that this one was actually true. 71% of clinicians thought that their use of digital health tools will increase, if not stay the same, after the pandemic subsides. Now, that may be a surprise to some of you and others of you, perhaps a relief. But what does this really mean? Well, it means that digital health tools to help streamline and enhance their experience.

And going forward, convenience is really currency in the future healthcare landscape, and the digital health tools of the future are going to have to be able support that. One area where we're seeing that happen is in the shift to location agnostic care or care



anywhere, where essentially patients can receive care in the most convenient but appropriate location without that necessarily being constrained to the hospital or clinic walls. But of course, to be able to do that, digital health tools have to be embedded and coordinated across digital, virtual and physical environments simultaneously in a hybrid-model to support this. And of course, to get full adoption here, it needs to be done with minimal disruption to clinician workflow, as ultimately, clinicians need to feel comfortable with those digital health tools for them to be adopted.

So that comfort leads us to the second statement here, which is really around clinicians believing that AI is a threat to their future prosperity. Now, this one was actually false. 76% of clinicians said that AI is not a threat to their future prosperity. I have to admit, I was somewhat surprised by how enthusiastically clinicians are embracing AI to augment what they currently do. They're not afraid that the technology will replace them, but actually quite excited for the opportunity to partner with AI, to augment their clinical capabilities for the better.

And that's really pretty important here because the task ahead is really quite difficult. As you all know, we're increasing the expectation for the amount of personalization and data being brought into the clinical decision-making process, all while expecting to lower the cost to serve. So, clinicians could really do with some help here, for example, through AI providing evidence-based insights in a clinical decision support role, in addition to the administrative tasks, that they're already doing more of. But of course, to do this in an effective way, those insights have to fly at a

level where they help, but don't harm clinician productivity and be coupled with the right QA processes and data feedback loops within it. But taking a step back, our willingness to embrace technology is not sufficient for the success of technology going forward. There needs to be a willingness to invest as well.

And that takes us to that third statement—clinicians see value in the business case to invest in AI and digital health tools. Now, this one was actually true. 68% of clinicians saw that the long-term impact for digital health was positive. And despite a recognition that the investment required is actually a barrier, 76% believe that investments in digital health will increase over the next five years anyway. Now, that's great that the initial investment is there, and there's a lot of support behind it. But as we all know that doesn't tell you the full story. Someone once jokingly asked me what do healthcare technology investments have in common with commercial flights, and the answer, of course, was pilots. Pilots are very much a reality within healthcare technology investment. We often start with one, and the bar to get out of pilot mode is really quite high.

But it's quite necessary to be able to scale the technology and unlock the value. But how do you do that? Well, one needs to be able to demonstrate in a meaningful and measurable way that there's impact, at least across a few of some things. It needs to be able to improve outcomes, improve experience, improve access or be able to reduce costs. So, no matter who you are across the healthcare ecosystem, you need to be thinking about how do you demonstrate and measure value as early as possible so that organizations can invest beyond the pilot.



So, let's recenter. We've spoken about the demand for technology. We've spoken about clinicians' willingness to embrace technology. We've spoken about the need to actually get this financed.

But ultimately, the barrier to success for technology going forward is going to be related to trust, which takes us to that fourth statement—clinicians trust in the security of healthcare technology. Now, unfortunately, this one was false. The results from our survey was a mixture of specific concerns around security and the ability to protect patient data, alongside general lack of trust in where the technology is coming from.

There's obviously a lot of work we need to do here, but the good news is there's some things that we can get started right away, at least three of those things. The first, tools. We can, we can invest in the tools, which provide the level of security that everyone feels comfortable with, and that may mean going beyond the password. The second thing is around transparency, being clear and open about where the technology is coming from—who's a designer, who's a programmer. How did the protocols arise? And the third piece is around training, ensuring that clinicians, patients and others across that care delivery system are thoroughly and appropriately trained on how and why to use the tools appropriately—the three T's.

So, what have we covered today? Well, we've uncovered four main truths. The first being that clinician digital health tool adoption will not revert to pre-pandemic levels. We understand that patients see value in that convenience, and it's going to be integral to location agnostic care going forward. The

second is that clinicians believe that AI is part of their future prosperity. They're willing to partner with the AI to augment their clinical capabilities for the better. The third being that clinicians see value in the business case to invest in AI in digital health but need some help in being able to demonstrate value beyond the pilot, so we can invest beyond that. And then the fourth being that there's some more work to do in getting clinicians comfortable with security of healthcare technology. And we have a starting point, the three T's: tools, transparency and training. So, coming back to that overarching question, do clinicians have faith in the future of healthcare technology? Well, the answer has to be a resounding yes, if we are to scale technology in a sustainable way. How do we get to yes? Well, we've started the conversation here. So, let's continue it. You have each other, and you can find me on LinkedIn.

Thank you all.