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ASSOCIATES

FUTURE STATES
FORUM

THE FUTURE OF HEALTH

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DINNER DISCUSSION HIGHLIGHTS

We discussed the **future of health** and what we must do today to prepare for it.

Rapid advances in medical and scientific technology mean that people all around the world are living longer and healthier lives with increased access to quality health care services. Advances in information technology provide more comprehensive options for collecting, storing and sharing medical data, but also pose new challenges to privacy and security. As medical and health options expand, health perceptions and health care expectations shift and health and health care delivery becomes increasingly complex and challenging societal issues. Governments and industry alike struggle with legislation and regulations aimed at providing better healthcare for more people, while at the same time bringing skyrocketing costs down. The traditional metrics of health remain important today and will in the future, but socio-economic, demographic, lifestyle, and other changes rippling through every aspect of our information-age society are demanding that industry and government leaders also consider a much broader range of factors than have ever been examined under the rubric of "health."

We considered questions such as "**How will the accelerating pace of technology impact the clinician-patient relationship?**"

On September 25, 2012, Toffler Associates hosted a dinner with leaders from the public and private sectors and academia to discuss the future of health. This is a summary of our discussion. Please note that it is not a transcript, but rather a "rendering" that condenses, eliminates, expands, and recombines some areas of discussion to illuminate themes that we believe emerged. Any errors in the interpretation or nuances are ours.

We offered the following questions to spark the discussion:

- How are rapid advances in medical technology, medical records storage and processing, and other scientific advances changing the face of health, including healthcare and healthcare delivery?

- How do the shifting Federal policy and Regulatory landscape, industry consolidation, and the turbulent economic environment affect how healthcare will be viewed and delivered in the future?
- What new challenges, risks, and opportunities do healthcare providers and society as a whole face, and how can we “pre-adapt” our organizations and healthcare system to them?

Participants shared a wide range of views on multiple aspects of health including emerging technology, innovation, cultural challenges, changing patient demands, and the continued importance of the doctor patient relationship. Over the course of the evening, several primary themes emerged:

- **Health innovation is accelerating but implementation of those innovations too often is limited by organizational, process, and human factors that define our health care system**
- **Electronic health records, mobile devices and other technologies can and must be enablers to improve the doctor patient relationship, not replacements for it**
- **Significant culture and behavioral change will be needed to use emerging technology to its fullest advantage and consider new methods of health delivery**
- **The current “reimbursement” model can be an impediment to significant change**
- **There is a shift in the focus of the practitioner community from treatments to outcomes and improving, not impeding, the workflow to meet those outcomes**
- **Data analytics and informatics data are increasingly being used to drive behavioral change**

Health related technology, both clinical and electronic records keeping are advancing at a rapid pace, providing new options to clinicians and administrators. However, participants agreed that organizational, bureaucratic, and human dimensions are at risk of holding us back from actually achieving the promise of all the innovations and technology advances. **We must address the hampering effects of deep-rooted processes, organizational structures, regulations, and business models that dominate the current health care environment** that are at risk of holding us back from taking advantage of the innovations that animated the discussion. Many leading minds and practitioners, including some of the people at the table, have articulated truly audacious visions and goals for what health and healthcare can be like in the future. But we cannot implement them by standing in the present-day organizational and

bureaucratic context and projecting incremental changes. Imagining how to make the transformation actually happen can only come if we imagine a whole new, different future context – as one participant put it, “give ourselves blank slates, don't make or let ourselves stand with one foot in both worlds.”

There is a great deal of interest in using technology smartly in the new evolving health landscape not just for efficiencies and cost savings but to improve patient care. For example, cell phones in mobile health are going to be an important future area of medicine by enabling frequent and iterative exchanges between the patient and the provider to foster a collaborative ongoing “journey” of care as opposed to episodic treatment. Similarly, social media can play a growing role in the future of health care by better linking networks of providers and networks of patients and how they interact and share information. Finally, administrators, providers, and increasingly some patients see the power of big data and informatics but have not yet envisioned how to use the abundance of information available to empower consumers to understand their condition better and practitioners to help manage their condition better. It is a given that technology can revolutionize health care and health outcomes, but the challenge is in understanding what must change in **the people, processes, and structures that govern how, and in some cases even whether, we can bring those innovations to bear.**

The scientific and technological advances can enable transformation in all health care sectors. It can help government focus on sustainability of current programs and maturing those investments to drive wellness, economic and job growth, and get efficiencies out of the system. It can be a catalyst for job creation in the private sector.

The necessary cultural changes go beyond the need to modernize policy, regulation and process however. For transformation to occur, one shift in particular needs to happen. The current health care culture that is driven by reimbursement for services provided has to change as well. We must not fall into the trap of seeing the use or application of technological tools such as electronic health records or mobile devices primarily as innovations enabling clinicians to increase their productivity (increase the number of “services” for which they can be reimbursed), but rather as tools to help shift the paradigm from reimbursement to patient centered care. By freeing up time through efficiency, these technologies can give clinicians more time to spend with their patients and new, potentially richer ways of interacting with patients. They can create environments where clinicians can get a better understanding of the patient's condition and circumstances, and focus on tailoring treatment and preventative maintenance plans. The potential is to shift from reimbursable transactions to achieving highly personalized outcomes through collaboration between doctor, patient, and potentially networks of other “stakeholders” who can and should play a role.

These changes will require reform to the payment system but will also require behavioral changes throughout the medical community starting with medical students. Many health professionals increasingly focus on how to inspire and sustain behavioral changes in patients to get them to approach their own health differently, more proactively and in some cases more responsibly. Participants in our discussion observed that behavior change is needed on the other side of the patient-clinician equation as well. One dimension of it ties to the reimbursement model imposed by the business side of the system. While clinicians always think about how to provide care, the current model imposes a heavy emphasis on “reimbursement transactions. In the future, with changes to that model and technology as an enabler, clinicians will be able to focus more on favorable patient outcomes and preventative and wellness care, rather than a series of treatments that the organizational and bureaucratic context of the health care system treats as reimbursable opportunities. Reward should be tied to improving the overall health of an individual or group, rather than doing procedures. Technology can be the driver and enabler of this change, by helping clinicians use tools like markers, enhanced diagnostics and computational science supported by data informatics to personalize and tailor treatment strategies to eliminate unnecessary modalities, improving the efficiency and effectiveness of providing health care.

The ability to effect behavior change as a component of a patient's health regimen and a clinician's approach to interacting with patients and with the health care system is advancing rapidly as our understanding human science grows. Increasingly that understanding approaches the level of precision and sophistication we have seen in recent years in the health profession's employment of advances in observational science and computational science. Working to align the advances in all three of these areas and use them to reinforce each other can have a profound effect on our ability to achieve our aspirational goals to transform health and health care.

Another potentially important dimension of **behavioral change for the clinician will be to stimulate and motivate them to use some of the technology advances available to them in new ways.** Clinicians often are disinclined to use new technologies because they are different, because it's not the way it's always been done. New health information technology systems also are not necessarily user-friendly for the physicians. There may be too much information, difficulties in navigation, etc. The technology sector must work more closely with physicians to develop products and services that answer their needs rather than those of the developers. Technology that is responsive to clinical needs and helps them focus on treatment and spending time with patients will help facilitate the necessary cultural change. Technology which creates additional work or steps will not. The relationship between the physician and the patient is invaluable, and any model that focuses on building that relationship incentivizes both

sides of the equation. Electronic health records, mobile devices and their apps, and other technologies can and should free up time for the clinician to maximize the relationship with the patient and to fully empower them through the power of information sharing. If you are fully empowered and you are fully interactive, you do not have to physically be together, thus allowing for the realization of the full potential of such technological advances as telemedicine and mobile health. **We have to start building systems that complement, integrate, and enhance the workflow required to provide patient care rather than impede or complicate it.**

As physicians – and the patients themselves – are made an integral part of the development process for new technologies, they will have better experiences with the newer systems and be more willing to adapt them, pushing the capabilities of those electronic health records and other tools forward and creating a greater transparency and more transformative utilization of these better tools across the industry. The current situation is analogous to the status of business information systems in the early 1980s. There was a lot of initial resistance, but as technology companies built more usable systems, those systems became an integral part of daily business and invisible to the organizations using them. The same will be true for health care in the future, but it's going to take a true partnership between the users and vendors of the systems to make that happen.

Successful adoption of new medical technologies such as these also ties back to the shift away from the current reimbursement model of health care. While there is great engagement from the medical community, hospitals may be reluctant to adopt new technologies that are not tied directly to reimbursement rates. Technology that reduces the need or number of reimbursable procedures is not economically attractive to hospital administrators under the current model. This has a discouraging effect on the development and use of emerging technology. While this may change in 2014 as the Affordable Care Act currently is scheduled to phase in, a clearer understanding is needed now to ensure a smooth transition under the act.

It is clear that regardless of new technological advances, the **clinician-patient relationship remains the foundation of a successful healthcare system in the future.** The current system means that patients may not be receiving tailored treatments for their needs and costs far too much. It facilitates oversupply of hospital systems in urban areas, while grossly undeserving rural areas. Changing the paradigm to use technology to enhance and enable the clinician-patient relationship will help optimize the system so that patients get the right amount of care at the right time, reducing expensive excess beds and hospitals. It can allow physicians to get rid of the “tyranny of the chief complaint” and take care of the patient as a whole, rather than treating that

complaint. Technology in the form of electronic health records, new diagnostic and treatment methods can help physicians free up the time they need to accomplish that paradigm shift. In turn, this transformational cultural change will lower the barriers to the implementation of innovation.

As we wrapped up the evening's discussion, we agreed that this was a period of great change for health and health care but we saw many of the changes as opportunities and were optimistic about the future:

- Through advances in technologies and innovation within the industry, there is an opportunity for greater transparency, improved patient care workflows, stronger patient-clinician relationships and improved patient outcomes
- Transformational change within the health care industry is possible if we focus on and succeed in aligning the people and their behaviors with changed processes organizational structures, regulations etc that enable us to employ the available and emerging technologies to meet patient demands

CONCLUSION

The future of health lies in using the technological and other innovations we are eminently capable of creating and making them align to the workflow of the provider and also to the expectations and needs of the patient. The technologies and the workflow in turn must be afforded the opportunity to work within a new organizational, bureaucratic, and human dimension context for health and healthcare. The relationship between the patient and the provider will remain key, and can be revolutionized if we are successful in those objectives.



TOFFLER ASSOCIATES

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To accomplish this, we employ a collaborative approach to guide clients in the development of Knowledge Age business strategies. Our **Future Proof** SM business consulting service provides clarity by identifying the risks and opportunities that may lie ahead, enabling leaders to implement the changes necessary to create value, to sustain growth and to succeed in future operating environments.

We work with public-sector clients, such as federal agencies, the intelligence community, associations and educational institutions, to develop and implement ways to use resources more effectively and to build lasting public trust. We work with private-sector clients, like those in the transportation, aerospace, chemical, advanced materials, information technology and defense markets, to create and execute strategies that drive top-line growth.

We find daily inspiration in working with commercial enterprises and government agencies that are creating something that really matters to people, clients who are trying to make a difference in all of our lives. Our purpose is to help them achieve that. It is the passion that unites our firm as one community.



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