Defining Your Virtual Care Offering:
A Ten Step Guide to Success

Introduction

In this guide, we will provide a step-by-step approach to evaluating your organization's virtual care capabilities and building a vision for where you want to go. If your product or solution already provides or supports some aspect of virtual care, this guide will help you understand other opportunities.

Step 01 — Understand the Virtual Care Market

What exactly is virtual care? Simply put, the term virtual care encompasses all the ways patients and doctors can use digital tools to communicate in real-time.

The virtual healthcare delivery market was $21 billion worldwide in 2019 and is projected to reach $95 billion worldwide and $77.4 billion in the US by 2026.

Prior to COVID-19 the next big thing in health care was supposed to be telemedicine. Billions of dollars were poured into apps and websites that offered virtual consultations with physicians, ranging from Doctor on Demand to Amwell.

HOW BIG IS THE VIRTUAL CARE MARKET

Virtual Care:

$21 billion in 2019

$95 billion by 2026

However, at that time, growth was limited. Even now, many U.S. consumers are still not aware they have the option to chat with their doctor over the phone or via video. The patients who do know of telemedicine apps often fear the expense, especially if it's unclear whether they can use their health insurance. In some cases, the apps that charge for their services can be out of reach financially.

In addition, early on the doctors who were willing to work with app makers were less seasoned, which resulted in a poorer consumer experience. In 2016, researchers posing as patients turned to 16 different telemedicine apps to diagnose skin issues. They found that some of the online doctors misdiagnosed conditions like syphilis, while others prescribed unnecessary medication.

Step 02 — Understand How COVID-19 Has Accelerated the Need and Demand for Virtual Care

While the market was already large, the worldwide virtual healthcare delivery markets are expected to achieve even more significant growth as the pandemic continues to affect the world.

The sudden global outbreak of coronavirus is expected to boost telemedicine usage. In fact, because of social distancing, virtual care delivery is now seen as an effective way for caregivers to communicate with their patients and provide needed healthcare.

Consequently, the World Health Organization (WHO) mentioned telemedicine as one of the essential services in the policy to respond to the COVID-19 pandemic. Telehealth has also been approved as part of the Coronavirus Preparedness and Response Supplemental Appropriations Act. As a result, telehealth is more accessible and affordable today than in the past.
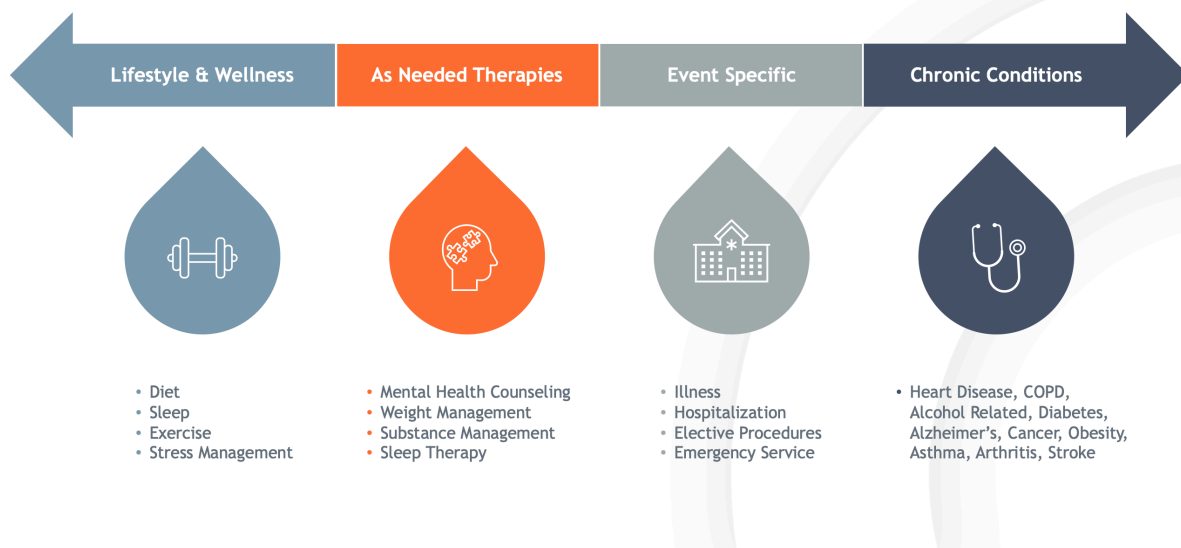
Another trickle-down effect of the pandemic is the impact on hospital financials. Patient volumes have been cut in half despite expected surges in COVID-19 cases. This has resulted in drastic hospital revenue loss in the United States. For example, hospital revenue is dropping by an average of $1.4 billion per day according to a new Crowe RCA Benchmarking Analysis.

Step 03 — Understanding The Virtual Care Continuum

Now you see the growth and demand it's time to assess your virtual care model. But how do you begin?
The first step to building a virtual care model is to understand where the patient is in the virtual care continuum.
At Catalyst UX we have 4 major spheres of the continuum for which a patient may move between. For example, in the baseline phase "lifestyle & wellness," a patient may simply be monitoring their exercise or stress levels. But if something happens like an illness, they may move to an event specific phase and then back again. This is one of the ways in which we evaluate what level of care is needed at each point in the continuum.
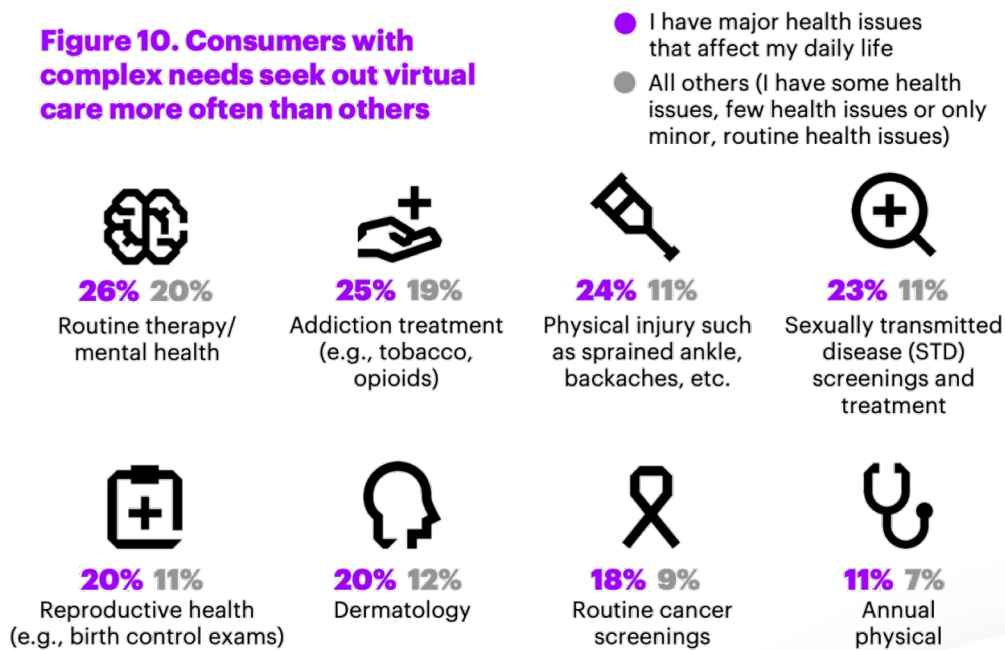
THE CARE EXPERIENCE CONTINUUM

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Lifestyle & Wellness	As Needed Therapies	Event Specific	Chronic Conditions
• Diet • Sleep • Exercise • Stress Management	• Mental Health Counseling • Weight Management • Substance Management • Sleep Therapy	• Illness • Hospitalization • Elective Procedures • Emergency Service	• Heart Disease, COPD, Alcohol Related, Diabetes, Alzheimer's, Cancer, Obesity, Asthma, Arthritis, Stroke

Step 04 — Understand Patient Needs for Complex Conditions and Chronic Diseases

Another lens is how complex the patients needs are. Patients with more complex needs are utilizing virtual care more than other patient groups. According to the Accenture 2019 Digital Health Survey, this is the case across needs from routine therapy to physical injury and cancer screenings (see infographic).

Figure 10. Consumers with complex needs seek out virtual care more often than others

● I have major health issues that affect my daily life

● All others (I have some health issues, few health issues or only minor, routine health issues)

26% 20%
Routine therapy/ mental health

25% 19%
Addiction treatment (e.g., tobacco, opioids)

24% 11%
Physical injury such as sprained ankle, backaches, etc.

23% 11%
Sexually transmitted disease (STD) screenings and treatment

20% 11%
Reproductive health (e.g., birth control exams)

20% 12%
Dermatology

18% 9%
Routine cancer screenings

11% 7%
Annual physical

Source: Accenture 2019 Digital Health Survey

Another area of growth for virtual applications is managing chronic diseases. Chronic diseases are among the most prevalent and costly health conditions in the United States today. Nearly half of all Americans suffer from at least one chronic disease, and that number is growing.

In the U.S. alone, chronic diseases account for nearly 75 percent of all healthcare spending and are responsible for 7 out of 10 deaths. The good news is that virtual apps can help patients manage their health.
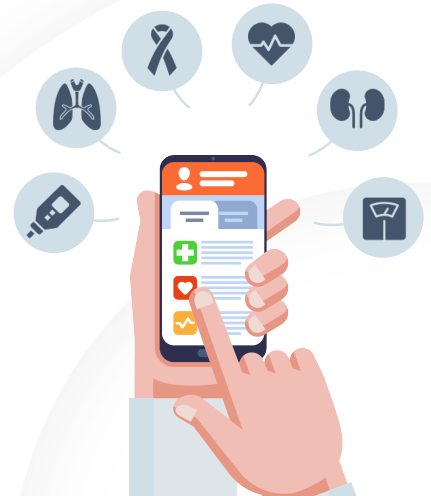
Step 05

Review the Catalyst Virtual Care Channels

At Catalyst UX, we have developed a model to review where your organization stands with respect to eight dimensions relevant in virtual care. We help organizations understand where their current delivery stands vs their desired state in everything from monitoring and evaluation to medication management. See below for all the channels of care.

Monitoring & Evaluation

Patient Engagement Support

Arranging & Receiving Care

Health Record Access

Medication Management

Insurance & Payments

Population Health Monitoring

Platform Elements

Identify the Best Way to Segment Your Organization

Next, you would think through how to evaluate your offering against these channels. For example, if your company has different divisions or brands you would assess how those brands stack up today and the desired future state across virtual care capabilities. In this model, segments are listed out in the columns. See table.

Catalyst UX Digital Companion Virtual Care Assessment Model

Your organization or care population segments		Example MediCare Patients		Example Businesses					
Status of current virtual (digital) capabilities	Currently Provide / Desired		Currently Provide / Desired		Currently Provide / Desired		Currently Provide / Desired		Currently Provide / Desired
VIRTUAL CARE CAPABILITIES (CHANNELS)									
1 MONITORING AND EVALUATION									
1.1 Collect display wearable data				x					
1.2 Recommend/Provide Digital Health Devices				x					
1.3 Specialized Assessments									
1.4 Collect patient generated insights				x					
1.5 Personalized Analytics and Intelligent Insights									
2 ARRANGE AND RECEIVE VIRTUAL CARE			x						
2.1 Enhanced Communications Text, Email Video									
2.2 Schedule Care and Logistics									
2.3 High-Touch Health Concierge/Wellness Coach				x					
2.4 Remote Diagnostics				x					
2.5 Telehealth Services				x					
3 MEDICATION MANAGEMENT									
3.1 Prescription Initial filling and refills			x	x					
3.2 Enrollment			x						
3.3 Adherence				x					
3.4 Adverse events and patient reported outcomes									
4 POPULATION HEALTH MONITORING									
4.1 By business or organization unit				x					
5 PATIENT ENGAGEMENT AND SUPPORT			x						
5.1 Outbound Awareness Campaigns				x					
5.2 Personalized Content				]					
5.3 Challenges and Incentives									
6 HEALTH RECORD ACCESS									
6.1 Access Lab Results and Diagnostic tests									
6.2 View my medical records online									
6.3 Communicate with my Providers									
7 INSURANCE AND PAYMENTS									
7.1 Plan evaluation and enrollment									
7.2 Plan details for enrollment									
7.3 Pre authorizations									
7.4 Manage Claims									
8 PLATFORM ELEMENTS									
1 No-code instant branding									
2 Experience Designer									
3 Modular 3rd party integrations									

Step 07

Evaluate Your Organization's Current Capabilities

Next, for each column, indicate where your organization is currently providing virtual care capabilities by matching them to the relevant rows (channels). This helps determine when you should make virtual care capability available.

Step 08

## Determine The Strategic Direction for Your Virtual Care Offering

Once you have evaluated where your organization stands you need to determine where you will invest your time and resources (your ultimate vision or direction). You'll want to think through how each virtual care capability will provide improvements to current patients. You'll also want to identify how these proposed changes would improve your commercial capabilities. For example, will the cost of delivery be reduced, can you more effectively use your staff, etc.

Create an Interactive Model for Proposed Virtual Care Experiences

With the possible improvements for desired virtual care in mind, you are ready to create a model. This is where Catalyst UX can help. We have designed several virtual care experiences for focused areas and chronic conditions like congestive heart failure and sleep therapy. We have also designed numerous virtual care solutions for telehealth and medication adherence.

Catalyst UX can help you rapidly create a vision for your virtual care experience that you can validate with patients, caregivers, partners, and internal stakeholders. See example here.
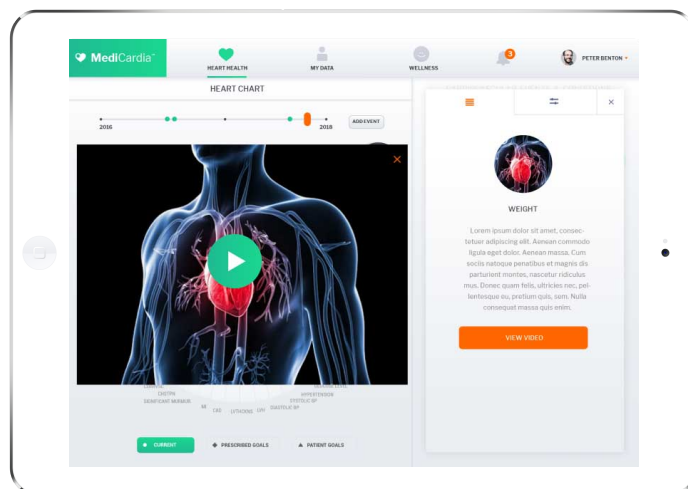
Validate Your Strategic Direction and Get Feedback

The first iteration of your model will never be completely perfect. But the good news is that the best way to refine your ideas is to run your thoughts by real users and incorporate their feedback into your model.

We're Here to Help!

CATALYST **UX**

Having completed the Catalyst UX 10 Step Guide to Virtual Healthcare, you should now be prepared to create a virtual healthcare solution(s) that meets the needs of patients and other constituents.

If you need help getting started, Catalyst UX will provide a free 30-minute call to review the strategy you set forth using this guide. We are happy to share examples of virtual care related to your strategy. To get started, email us at business@catalystux.com.