Forum 2021: Key insights from the community advancing virtual care

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> Forum is especially important this year —
> not just because of everything we've been
> through over the last 18 months, but because
> as an industry, we're on the verge of another
> unprecedented moment of change.

Jason Gorevic
Chief Executive Officer, Teledoc Health

The COVID-19 pandemic changed the world and there's no going back. Consumer expectations have changed, technology adoption has accelerated, and an openness to bold ideas pervades every industry. In healthcare, virtual care is at the core of that transformation.

This is the moment in which we can shift healthcare delivery from episodic care to whole-person, always-on, everywhere care. This is our opportunity to improve outcomes for all people.

At Forum 2021, we gathered thousands of thought leaders and virtual care experts from around the world to explore innovative strategies and next practices that will help move virtual care forward, from its breakthrough in a public health crisis to the first way consumers engage with the healthcare system.

Although Forum 2021 is over, the conversation carries on. This ebook highlights **eight key insights** surfaced from our collective community of speakers who shared their perspectives this year.

1   **The marketplace is primed for virtual-first strategies.**

2   **Consumers expect healthcare experiences that match their digital lives.**

3   **COVID-19 spurred transformations that are here to stay.**

4   **Mental health is a gateway to virtual care adoption.**

5   **Evaluating quality outcomes over time is the next frontier for measurement.**

6   **Hospital-at-home is an in-patient experience amplifier.**

7   **Virtual care opens the door to health equity.**

8   **Healthcare transformation requires bold leadership and strategy at scale.**

These insights will shape the next normal. It is up to our virtual care community to turn the vision captured at Forum 2021 into a reality. None of us can do it alone. To make the next leap forward, we need to combine and align our disciplines and each corner of the healthcare ecosystem.

Now is our moment. Join us.

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The marketplace is primed for virtual-first strategies

Virtual-first care is becoming a reality — and maintaining its adoption is top of mind across the virtual care community.

Employers and health plans, in particular, are determined to expand their virtual-first strategies, and for good reason. According to Aon, less than half of employees and families in an employer-sponsored health plan have an active relationship with a health home or primary care provider. This represents an enormous opportunity for virtual primary care models, to address barriers and enable longitudinal relationships between people and care providers.

Virtual primary care can be a catalyst for virtual care's centrality in the future. The convenience of virtual care, combined with an enduring relationship with a primary care doctor, enables delivery of mental health care, preventive care and ongoing condition management. With those pillars of good health in place, we can improve outcomes while lowering the total cost of care for payers and employers.

Forum panelists agreed that virtual-first strategies are likely to take on a fairly typical adoption curve, one already seen in other industries. Incentives, for example, may get people to consider virtual-first care inside a more traditional health plan.
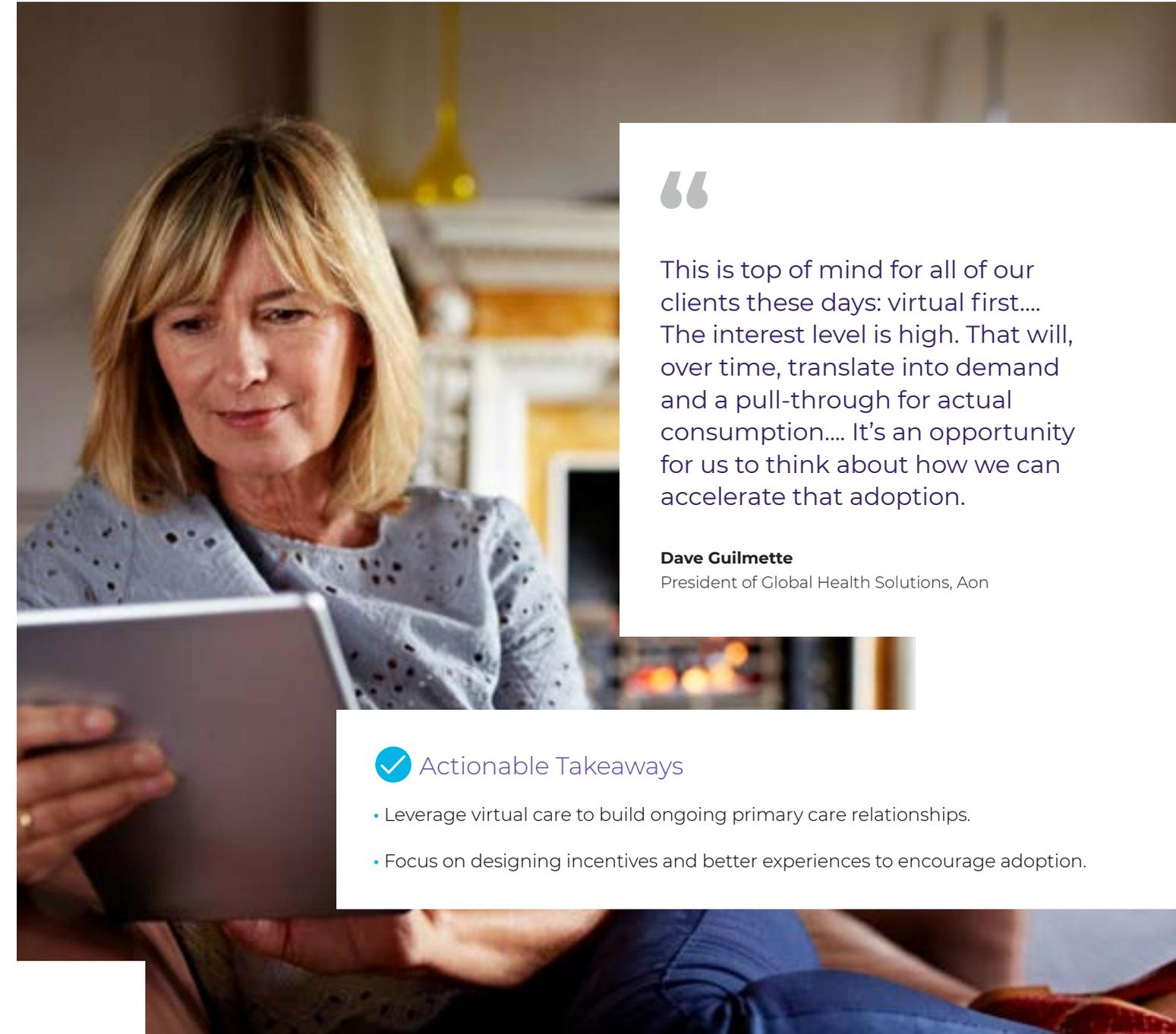
Panelists also agreed that in addition to incentives, experience will drive virtual-first adoption.

"If we can make the experience better than what someone experiences in the healthcare system today and more like those virtual and digital experiences that they have elsewhere in their lives, we think we can also pick up the adoption pace, because it will have that broader appeal," said Jill Dailey, Vice President, Aetna Commercial Product and Strategic Programs.

Pedro Díaz Yuste, CEO, Savia-MAPFRE, built on this thinking with a compelling call to action to Forum attendees:

1. Be user-first and the rest will come.
2. Be obsessed with data to inform the customer journey.
3. Build a platform that easily integrates with third parties to meet customers' needs with agility.

Engaging consumers with virtual-first strategies will require a strong commitment to improving the healthcare experience.

> " This is top of mind for all of our clients these days: virtual first…. The interest level is high. That will, over time, translate into demand and a pull-through for actual consumption…. It's an opportunity for us to think about how we can accelerate that adoption.

Dave Guilmette
President of Global Health Solutions, Aon

✅ Actionable Takeaways

• Leverage virtual care to build ongoing primary care relationships.

• Focus on designing incentives and better experiences to encourage adoption.

Consumers expect healthcare experiences that match their digital lives

Interest in wellness — both physical and mental — was growing before the pandemic, but consumer engagement in virtual care surged during the crisis. As the outside world became inaccessible, people spent more time at home, took personal ownership of their health, and sought easier access to goods and services, including healthcare. As Kelly Twohig, Industry Director, Healthcare Google, reported, "On our platform, what we saw is anywhere from 300 to 400% increases in searches for virtual care around the globe."
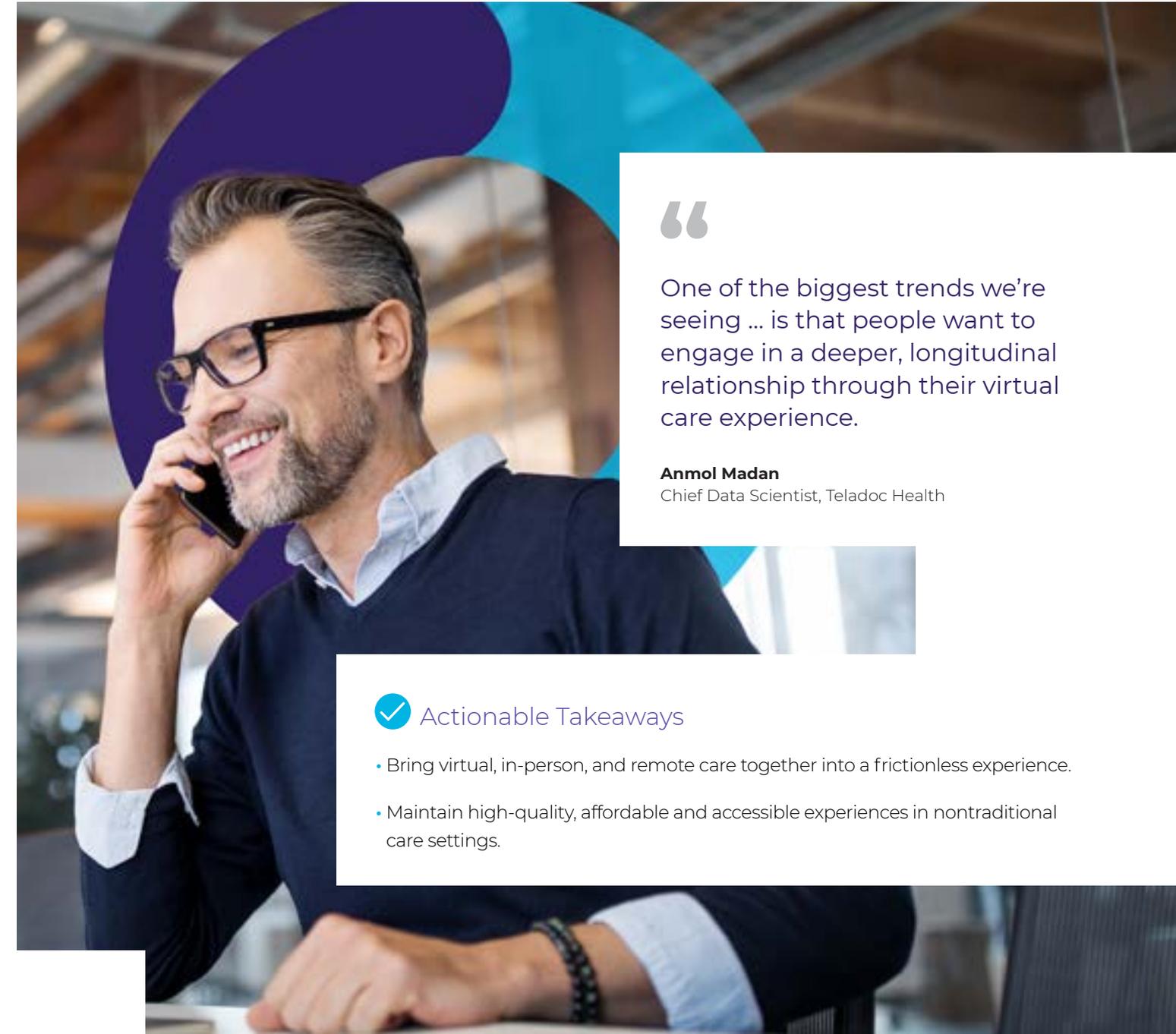
During a panel session focused on consumer experience, speakers unpacked changes in consumer behavior and expectations over the last 18 months. "Needs drive behaviors and behaviors drive expectations. What we're seeing now, as some portions of the globe move into this post-pandemic world, is a fundamental shift in the role service care providers play in our lives," said Twohig. Trends and services that were used sporadically in the past are now a part of everyday life, she said, with expectations for an even larger role in the future.

Sharon Vitti, President, CVS MinuteClinic, shared that while people are becoming much more comfortable receiving care in nontraditional settings and through multiple channels, their priorities for care remain unchanged. **They still want high-quality, affordable, accessible, and convenient care, no matter the point of care.**

Presenters considered if a subset of consumers was driving the shift to virtual in healthcare. Anmol Madan, Chief Data Scientist, Teladoc Health, said he has seen a sustained adoption of virtual care by Gen Z, especially around mental health. But it's not only young adults. Gen X and older generations are also using virtual care at higher rates now than before the pandemic.

Madan also noted that, beyond generational differences, "we're seeing that certain conditions are essentially gateways to virtual care." People using mental health services, for example, over time, build a comfort level with virtual care that makes it easier for them to engage in chronic condition management virtually in the future. Knowing consumers' behaviors and preferences when using products and services can pinpoint how to best support their health over the long term.

Ultimately, consumers, regardless of age or health status, expect us to meet them where they are. People want to engage in a deeper longitudinal relationship with their virtual care experience. **And once they try virtual care, they want to use it more for a range of needs.** Consumers are looking to us, the virtual care community, to decrease the friction and fragmentation across points of care. Care delivery must continue to evolve to bring virtual, in-person, and remote care together into a seamless, personalized experience.

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> One of the biggest trends we're seeing ... is that people want to engage in a deeper, longitudinal relationship through their virtual care experience.
>
> **Anmol Madan**
> Chief Data Scientist, Teladoc Health

✅ Actionable Takeaways

- Bring virtual, in-person, and remote care together into a frictionless experience.

- Maintain high-quality, affordable and accessible experiences in nontraditional care settings.

COVID-19 spurred transformations that are here to stay

The past 18 months have often been referred to as a time of forced innovation, as hospitals and health systems needed to shift their clinical and business practices nearly overnight. Despite the devastating human and economic costs of the pandemic, unexpected micro-transformations and learnings were gained that can carry our industry forward. How those transformations and learnings will be sustained and translated to the next normal was a central question at Forum 2021.
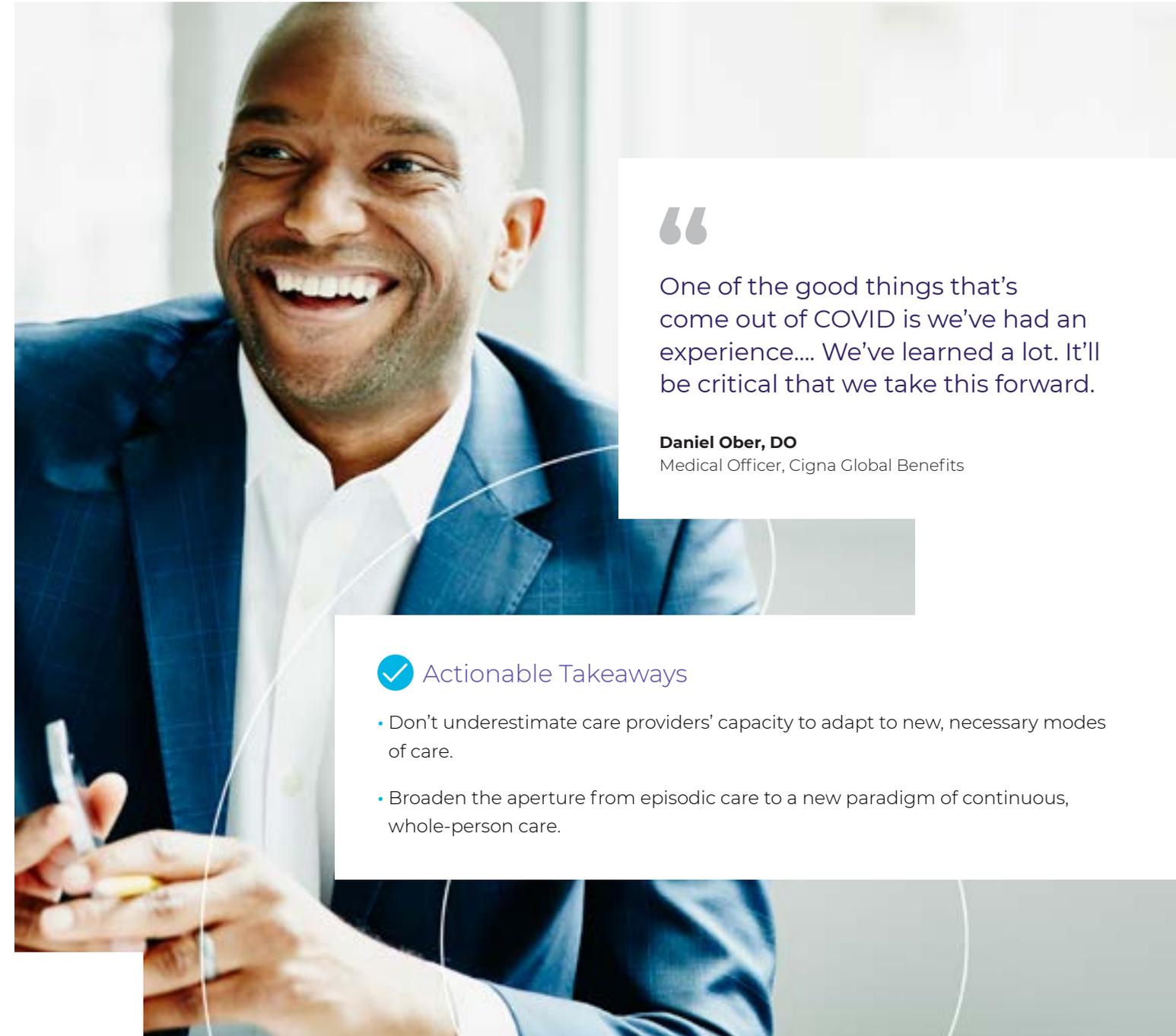
Virtual care is leading a transformation from a focus on episodic sick care to meeting a whole range of patient needs as they navigate the healthcare system. It's "widening the aperture of what it means to provide care," said Rasu Shrestha, MD, Chief Strategy and Transformation Officer and Executive Vice President, Atrium Health. He described the evolution as a collective shift to a continuous consumer experience, made possible by virtual care.

One of the greatest revelations of the pandemic was the speed of provider adoption of virtual care. Even care providers who had been adamantly against virtual visits suddenly pushed to adapt it faster. The pace of adoption across specialties was not only surprising but also shifted how care providers work together. Providence Health System was able to shift telehealth care providers to regions with greater demand overnight without facing the usual months of regulatory hurdles, opening new opportunities for collaboration among care providers.

Despite the speed with which hospitals and health systems were forced to expand virtual care delivery, panelists agreed that patients responded with high levels of satisfaction. "They're feeling like their needs are being met and they're being taken care of, so [it's] a win-win," said Daniel Ober, DO, Medical Officer, Cigna Global Benefits. With effective training, **care providers are finding that virtual care can deliver more personal interaction,** as physicians are less likely to be interrupted or distracted than they are in clinic settings.

Dr. Ober and Dr. Lew Levy, Chief Medical Officer, Public Policy and Strategic Partnerships, Teladoc Health, also spoke to two related surprises that occurred because of the pandemic. First, said Dr. Levy, was seeing virtual care adoption across a diverse set of case mixes. And the second was recidivism — the number of repeat users. "And it's fascinating because it's for different diagnoses, different reasons. It's not the same thing," said Dr. Ober.

Despite some of these silver linings, there is still much work ahead. Panelists concluded with an important call to action: How do we bring all of this together? "Virtual care was never meant to be a separate pathway toward care, distinct from the rest of healthcare delivery," said Dr. Levy. "And that thoughtful integration of so-called bricks and clicks will be absolutely essential in terms of the sustainability of virtual care in the years ahead."

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> One of the good things that's come out of COVID is we've had an experience.... We've learned a lot. It'll be critical that we take this forward.
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> **Daniel Ober, DO**
> Medical Officer, Cigna Global Benefits

✅ **Actionable Takeaways**

- Don't underestimate care providers' capacity to adapt to new, necessary modes of care.

- Broaden the aperture from episodic care to a new paradigm of continuous, whole-person care.

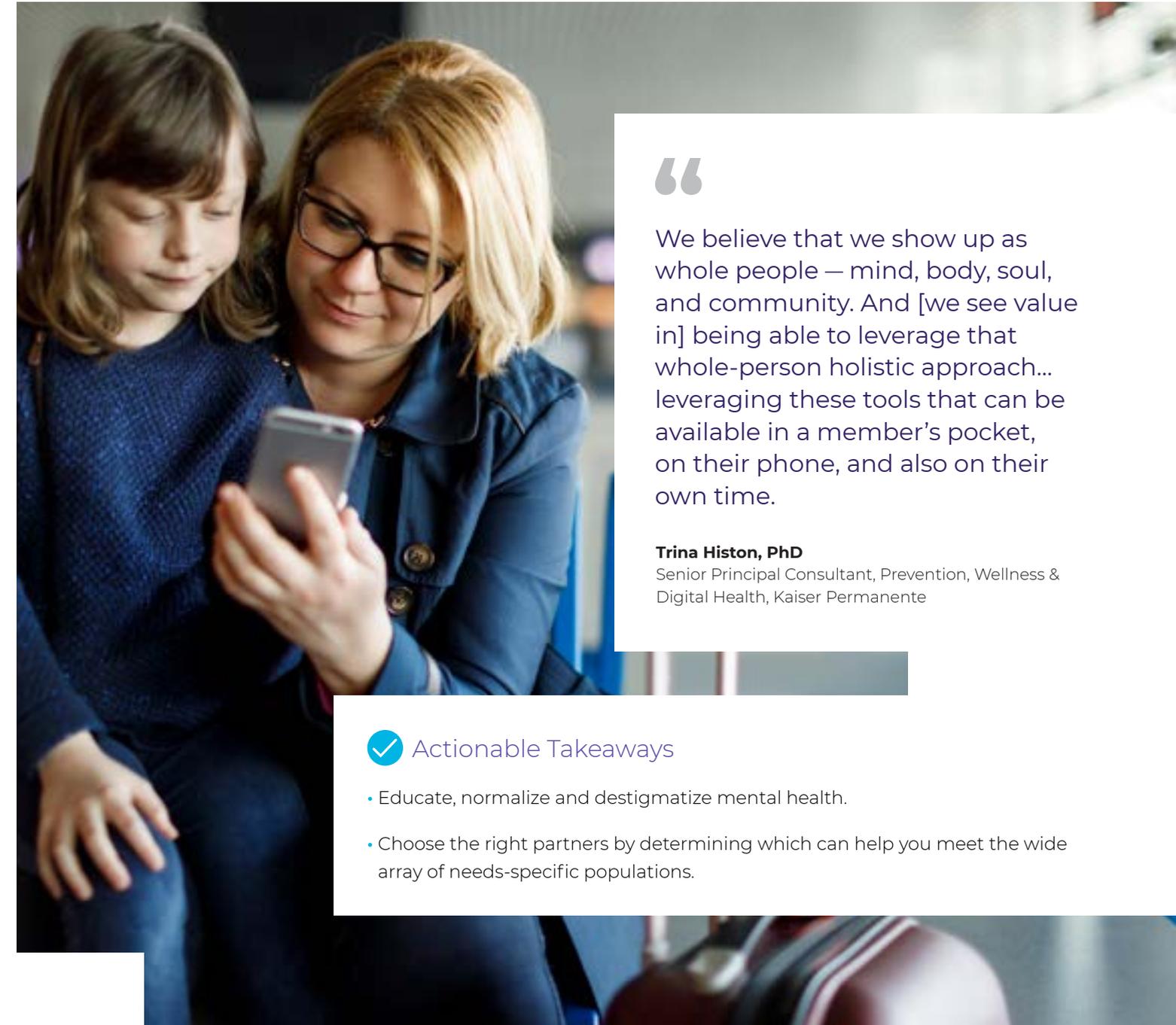# Mental health is a gateway to virtual care adoption

So much has changed in mental health in the last few years — and the pandemic accelerated that trend. The crisis not only intensified people's need for mental health services during a sustained, stressful emergency experience, but it also changed the primary delivery method of behavioral care by necessity.

This emergent need had surprising results, which were captured in a recent study conducted by Teladoc Health of more than 2,000 U.S. consumers. Dr. Julia Hoffman, VP of Mental Health Strategy, Teladoc Health, highlighted one of the key findings: the study revealed people's openness to using a range of traditional and nontraditional mental health services. In fact, among respondents who used mental-health services, a staggering 75% rated both their in-person and virtual care visits as very good or excellent.

Results also showed that almost 80% of respondents preferred a single unified experience for self-management of mental and physical health. **The finding underscores the importance of providing integrated holistic care solutions that capture the individual in the context of their life.**

While virtual mental health shows promising results, its benefits have yet to reach a majority of patient populations. Stigma is still a big barrier to seeking help, regardless of the modality of care. "Only about 40% of people who have a treatable mental health need are actually receiving treatment," said Dr. Hoffman. What do we need to do as a community to get people the care they need? "Educate, normalize, and destigmatize," said Dr. Trina Histon, Senior Principal Consultant of Prevention, Wellness and Digital Health, Kaiser Permanente. We can use digital and virtual tools to help with that process. **As we move into virtual care, panelists stressed, we must preserve the "human touch."** Leaning in to listen or making eye contact are critical, along with finding new ways to express empathy and training care providers on how to do so through a screen.

Lastly, from an employer perspective, providing comprehensive mental health services is a top priority. Mental health is something employers have been focused on for years, but in this unique moment, multiple efforts are coming together. In an increasingly diverse workforce, identifying the right solutions to support a wide array of challenges is not just critical for employee well-being but at the center of equally urgent conversations around diversity, equity, and inclusion.

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> We believe that we show up as whole people — mind, body, soul, and community. And [we see value in] being able to leverage that whole-person holistic approach... leveraging these tools that can be available in a member's pocket, on their phone, and also on their own time.

Trina Histon, PhD
Senior Principal Consultant, Prevention, Wellness & Digital Health, Kaiser Permanente

✔ Actionable Takeaways

• Educate, normalize and destigmatize mental health.

• Choose the right partners by determining which can help you meet the wide array of needs-specific populations.

Evaluating quality outcomes over time is the next frontier for measurement

Virtual care is changing how quality care is delivered and measured. And while national Press Ganey patient experience surveys in the U.S. reveal that patients perceive virtual care as just as good or slightly better than in-person experiences, **virtual care must focus on what is known in health policy as the "triple aim." This will require careful consideration on how to best measure quality along three key domains,** described by Brent James, MD, Clinical Professor, Clinical Excellence Research Center (CERC), Department of Medicine, Stanford University School of Medicine:
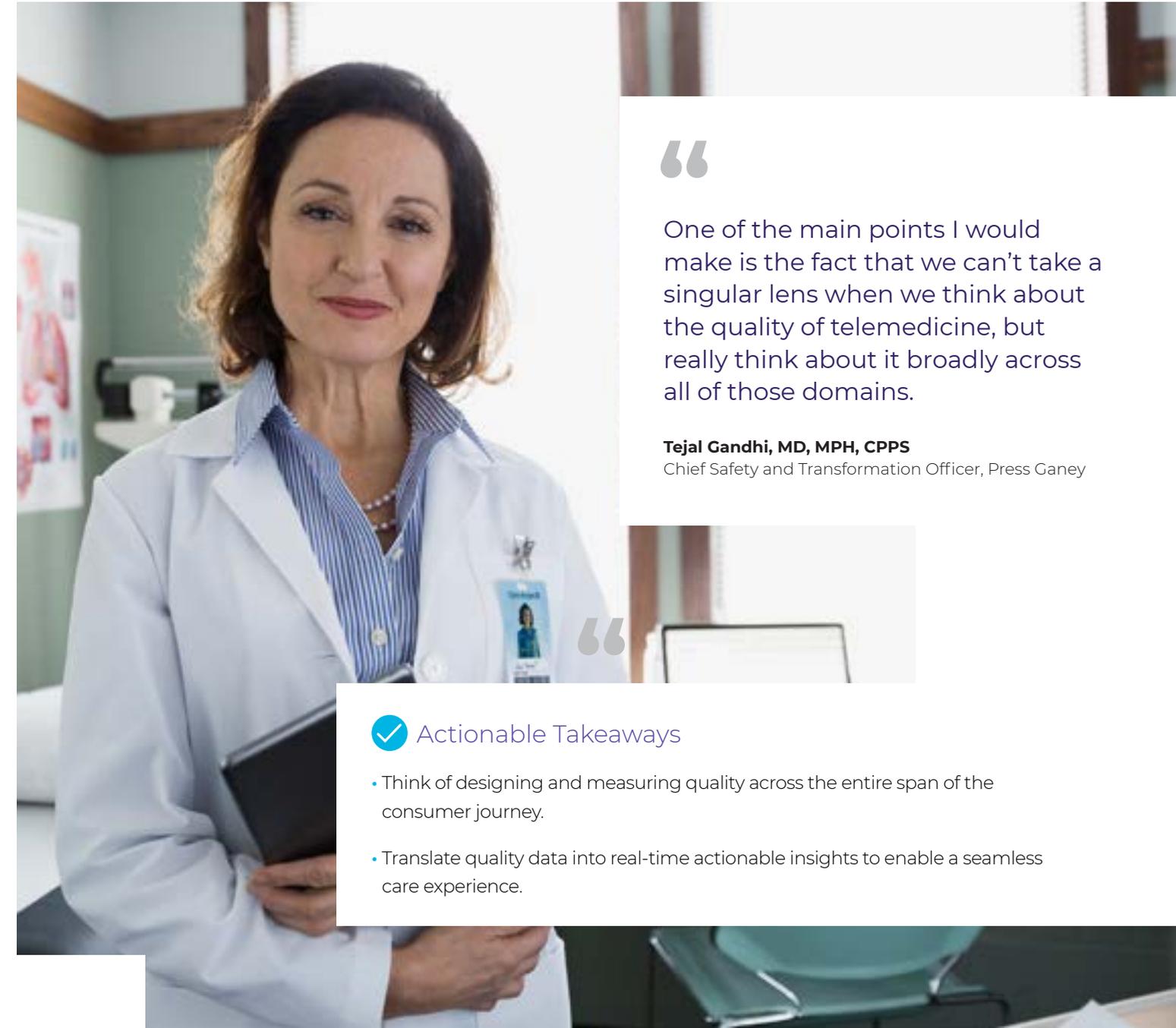
Key measures of virtual care quality
- Clinical outcomes of care
- Patient experience of care
- Cost of care

Dr. James also emphasized the importance of being able to measure quality not just across domains, but also in real time: "We're trying to build in-flight experience questions. And we see this a lot in retail and other industries. In the middle of being on a website, you're going to get a little pop-up that says, 'How's your experience? How are we doing?' We want a similar idea, so we can get an immediate real-life pulse of where we are and where we might need to pay attention."

With this in mind, speakers in the panel on quality care highlighted two key opportunities for measurement that will help drive a quality care experience. First, is ensuring "no one is left behind" by incorporating holistic measurements — such as equity — when thinking about quality of virtual care. Tejal Gahndi, MD, MPH, CPPS, Chief Safety and Transformation Officer, Press Ganey, spoke of the importance of very thoughtfully and rigorously applying the equity lens across all quality measurement domains. Second, as we move forward in our definition of health as an ongoing journey, we must develop quality metrics that accurately measure experience and outcomes over time. We will need to capture the trajectory from episodic to longitudinal care and expand it to include nontraditional dimensions of quality:

- Is it truly patient-centered?
- Did the service save time?
- Did the virtual care experience improve workforce metrics like employee retention or productivity?

Ultimately, the biggest opportunity will come not from measurement through a single lens, like patient satisfaction, but by disarticulating the patient journey to understand what quality means across each stage of the journey, across every condition for which the consumer seeks treatment, and across all channels the consumer uses to access care.

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One of the main points I would make is the fact that we can't take a singular lens when we think about the quality of telemedicine, but really think about it broadly across all of those domains.

Tejal Gandhi, MD, MPH, CPPS
Chief Safety and Transformation Officer, Press Ganey

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✅ Actionable Takeaways

- Think of designing and measuring quality across the entire span of the consumer journey.

- Translate quality data into real-time actionable insights to enable a seamless care experience.

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Hospital-at-home is an in-patient experience amplifier

During the pandemic, virtual care was a unifying force — from hospital-level care at home to chronic care management everywhere. At Forum 2021, the virtual care community glimpsed the future with insights from clinicians providing acute care beyond the walls of hospitals.

To begin, hospitals and health systems like Rush University Medical Center and Cooper University Health Care ramped up work groups and triaging systems to ensure they were delivering the right technology and operating models to deliver high-value care for specific needs. Their focus ranged from remote patient monitoring to chronic care management and a remote care command center to respond to emergencies.
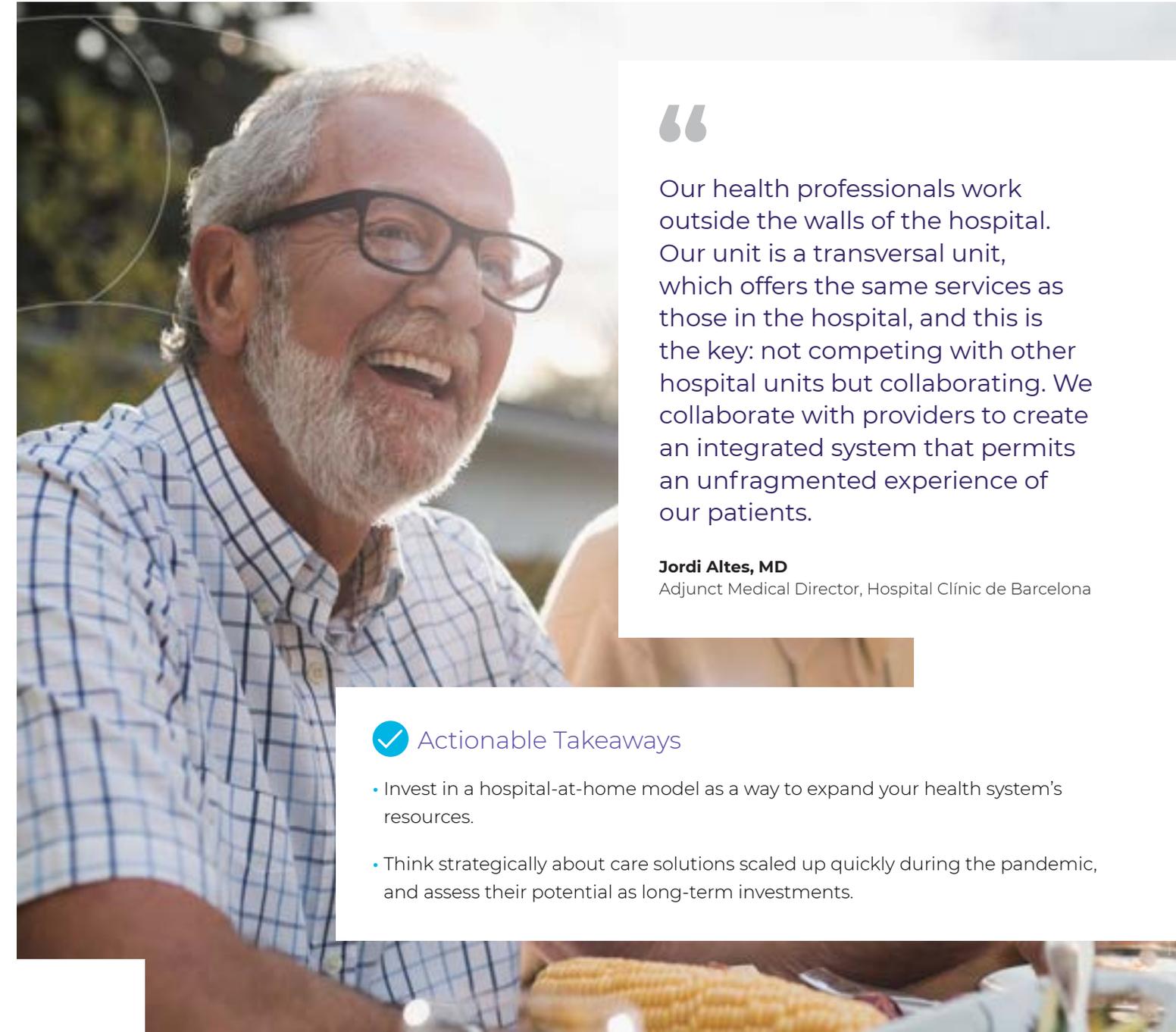
While many organizations had to quickly launch solutions for care that have traditionally required in-patient care, leaders like Hiten Patel, Chief Product Officer, Rush University Medical Center, have now begun to think more strategically about where to invest in these solutions over the long term, and are seeking technology partners to a build a coordinated system.

The fee-for-service model has not historically facilitated hospital-at-home programs in the U.S., but health systems in Europe offer a vision for the future. In Spain, Jordi Altes, MD, Adjunct Medical Director, Hospital Clínic de Barcelona, said 2% to 3% of the hospital's volume is hospital-at-home patients — which is almost 55% lower in cost than traditional in-patient care. When asked if they would seek hospital-at-home services again, 95% patients agreed they would.

Hospital-at-home models extend a health system's resources further into the community and help overcome health disparities. The model can help U.S. hospitals move away from fee-for-service to value-based care, as the innovation enables care delivery that can improve outcomes for marginalized populations with inequitable access to care.

Successful initiatives in the U.S. have so far been largely outside of traditional fee-for-service payment models. The Geisinger at Home model, for example, identifies high-risk, high-utilization patients and sends community health workers to their homes. There, the CHWs evaluate patients' clinical and social conditions and coordinate virtual visits with primary care providers.

It's just one example of how hospitals and health systems are extending capabilities into transformative and permanent models of care.

> "Our health professionals work outside the walls of the hospital. Our unit is a transversal unit, which offers the same services as those in the hospital, and this is the key: not competing with other hospital units but collaborating. We collaborate with providers to create an integrated system that permits an unfragmented experience of our patients.
>
> **Jordi Altes, MD**
> Adjunct Medical Director, Hospital Clínic de Barcelona

✅ Actionable Takeaways

• Invest in a hospital-at-home model as a way to expand your health system's resources.

• Think strategically about care solutions scaled up quickly during the pandemic, and assess their potential as long-term investments.

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Virtual care opens the door to health equity

There's a difference between equity and equality. This was a key point in a lively discussion among panelists led by Donna O'Shea, MD, Chief Medical Officer of Population Health Management, UnitedHealthcare. Noting that all patients are different, she said, equitable healthcare means getting people the unique care they need when they need it.

COVID-19 not only exacerbated and highlighted health disparities around the world, but it also validated the importance of addressing their structural and systemic root causes — and virtual care's role as an equalizer in access to care.

In response to the inequitable impact of the pandemic on marginalized populations, the virtual care community stepped up. Panelists spoke of multiple community-led initiatives that not only improved access but also helped people overcome social and environmental barriers to proactively manage their conditions.

America's Health Insurance Plans (AHIP) launched a vaccine community connectors program to reach vulnerable people. "Total health can't simply be providing access to healthcare. To create a community of healthy people, [an] individual's social, cultural, and language needs really must be met," said Kate Berry, Senior Vice President of Clinical Innovation, America's Health Insurance Plans (AHIP).

As we begin to reassess virtual care offerings through the lens of equity, it's important that we keep in mind what matters most for consumers: "Trust, empathy, expertise, and information, in that order," said Niti Pall, MD, Board Chair Harbr, Medical Director KPMG Global Healthcare Practice. "If you can build that trust and empathy digitally, well, your consumer will come to you."

Panelists agreed that an essential part in building this trust will require investing in learning and education. "Talking about health equity, talking about systemic issues, talking about race, place, and difference is an uncomfortable topic for some people" said Gerald Johnson, Health Equity and Chief Diversity Officer, American Heart Association. That's why AHA has focused on creating tools, like language guides and tip sheets, that can equip partners to better use the resources that they've developed. As Johnson suggests, it will be important for organizations to play a role as "aggregators and sharers of tools and content". Learning how to establish common language around these hard topics and being able to share those resources across platforms is a universal takeaway for any organization trying to make the healthcare experience a more equitable one.

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> We completely recognize that a person's overall health is impacted by much more than their medical issues. And because of that, we really believe that total health can't be achieved simply by providing access to healthcare. So, to create a community of healthy people, [an] individual's social, cultural, and language needs really must be met.

Kate Berry
Senior Vice President of Clinical Innovation with America's Health Insurance Plans (AHIP)

✓ Actionable Takeaways

• Ensure consumers are part of the discussion when deciding how to build care systems that overcome social and environmental barriers.

• Encourage community-based initiatives as a way to ensure more equitable access to care.

Healthcare transformation requires bold leadership and strategy at scale

Despite, or perhaps because of, the immediate stressors facing healthcare worldwide, innovations have been quick to start but slow to expand. One reason may be a broad failure to move innovations in care delivery beyond iterative testing to scale. Claus Jensen, PhD, Chief Innovation Officer, Teladoc Health, summarized the challenge for leaders working to transform the industry: "We have to amplify and power up all the good forces in healthcare that exist."
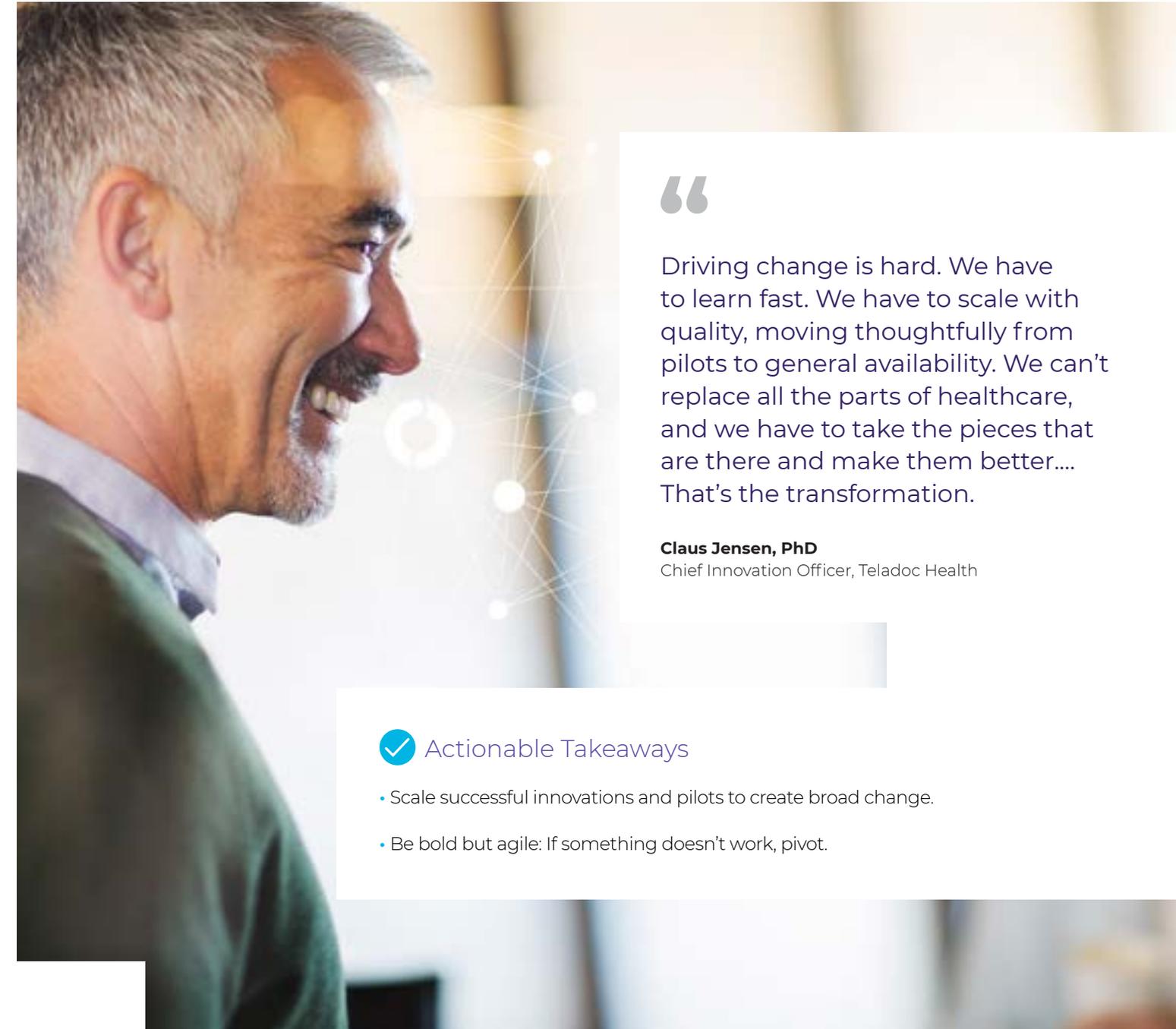
The key to transforming healthcare, said Stephen K. Klasko, MD, MBA, President, Jefferson Health, **may be to move from philosophical and academic discussions into practical implementations.**

A major challenge to mainstreaming innovative ideas, panelists said, are regulatory blocks, which are acute when shifting from a physical to a virtual environment. They cautioned that current incentives reinforce the status quo, meaning we may be stuck in a similar place when another public health crisis hits unless those incentives change.

Sue Paish, CEO, Canada Digital Technology Supercluster, suggested that healthcare transformations will be "citizen-driven." Healthcare leaders and policymakers will be pushed by consumers to change, not the other way around. For those looking to successfully navigate this transformation, there is one golden rule: Keep coming back to the individual. This means capturing what people are saying, listening to their needs, and leveraging these insights to understand what people are going to demand.

But moving from theory to practice, from innovation to impact, requires more than listening. It also means global leaders will need to empower each other through bold leadership, holding each other accountable to outcomes and incentives that turn the dial on issues including affordability, equity, quality, and patient experience. Only then will we be able to drive pilots with the power to transform healthcare to a sizable scale, noted Sukanya Soderland, Chief Strategy Officer, Blue Cross Blue Shield of Massachusetts.

In order to bring together the spectrum of virtual capabilities needed to take healthcare into the future, leaders will need to embrace partnerships and focus on "simplicity, clarity, and consistency," said Paish. The way to move forward is to focus on outcomes and not to confuse outcomes with process. In the end, all panelists agreed: This isn't going to be easy, but collectively, it can be done.

> "Driving change is hard. We have to learn fast. We have to scale with quality, moving thoughtfully from pilots to general availability. We can't replace all the parts of healthcare, and we have to take the pieces that are there and make them better…. That's the transformation.

Claus Jensen, PhD
Chief Innovation Officer, Teladoc Health

✅ Actionable Takeaways

• Scale successful innovations and pilots to create broad change.

• Be bold but agile: If something doesn't work, pivot.

> "Whole person care unlocks value that doesn't exist in the healthcare system today. The result really is a 1 + 1 = 3 model. By adopting a single solution that ties together every element of someone's physical and mental health, the whole is greater than the sum of its parts.

Kelly Bliss
President of U.S. Group Health, Teladoc Health

> "Virtual care is a transformative technology, and it can do so much more than just connect your providers with existing patients online. It can help hospitals and health systems offer more specialty services, reach more people, and partner with other networks to streamline patient care and build revenue.

Joe DeVivo
President of Hospitals and Health Systems, Teladoc Health

> "If we make the right choices now, we have an opportunity to revolutionize care all over the world. At Teladoc Health, we see it as our responsibility to do whatever we can to help. Because the opportunity with virtual care is too big and too important for any of us to take on alone. It's why we're bringing this community together at Forum, and why we're counting on all of you to help us make whole-person virtual care a reality — not just in the U.S., but everywhere.

Carlos Nueno
President of International, Teladoc Health

A vision of whole-person care ties together physical and mental health while overcoming environmental and access-to-care issues, and it is made possible by virtual care. It is the way forward but requires agility to meet the needs of all communities and populations over time. Virtual-first solutions that enable consumer-driven, customized, trusted, and longitudinal care are on the horizon. We now have the momentum and the technology to transform the healthcare system. It's up to us to build on it and speed the drive to change until our vision becomes reality everywhere.

At Teladoc Health, we could not be more excited to be on this journey with all of you.

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About Teladoc Health
Teladoc Health is the global virtual care leader, helping millions of people resolve their healthcare needs with confidence. Together with our clients and partners, we are continually modernizing the healthcare experience and making high-quality healthcare a reality for more people and organizations around the world.