

Beyond the horizon of virtual care

New dimensions of growth and sustainability.

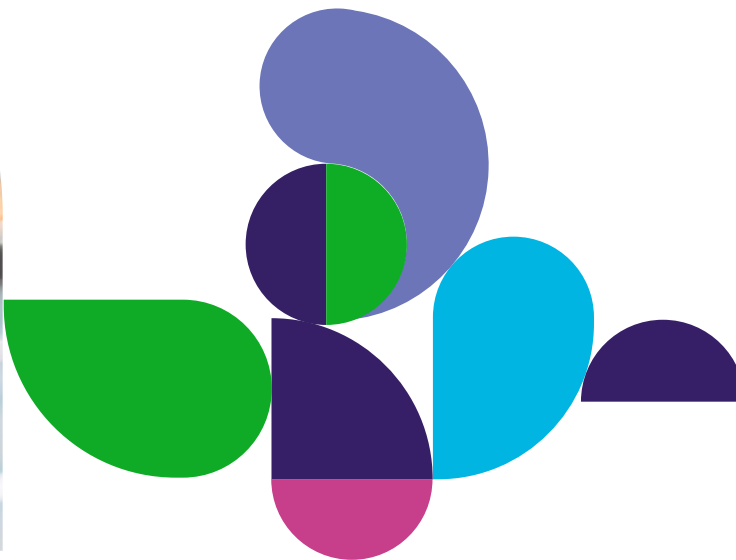




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“Hospitals and health systems are on the cusp of major transformation. Virtual tools are expanding access, deepening care capabilities and meeting consumers wherever they need care.”

**Andy Puterbaugh, President, Hospital and Health Systems,
Teladoc Health[®]**



The transformation of care delivery

Across the continuum, the clinical experience is being redesigned to deliver care virtually anywhere. It is now time to move from the fragmented approaches adopted in the pandemic to full integration and optimization—ensuring that compassionate, virtual, high-quality services are not a mere technology fix but a new dimension of healthcare delivery.

Integrated virtual care can go beyond singular improvements and shape a new standard of quality healthcare—one that is satisfying, intuitive and seamlessly present in everyday life. When incorporated into your business strategy, it can transform the capacity of your workforce, extend access to underserved communities and provide 24/7 connectivity to your entire patient population, new patients and beyond.

Leaders can expect more than the finite benefits of point solutions and can task integrated virtual care with addressing their core business challenges. The following pages explore six key areas and highlight the opportunities and considerations of using integrated virtual care as an enterprise-wide strategy for growth.



Rising above workforce challenges

Burnout, safety concerns, mental health stressors and low satisfaction make it very difficult to maintain a consistent level of high-quality care across a large hospital and health system. Virtual care brings new opportunities to address the challenges in delivering in-person care.

Integrating virtual care extends the reach of your high-performing clinicians to a much broader geography. It can triage patients before they go anywhere, offer surge coverage, increase patient-to-clinician ratios and address staffing shortages across hundreds of specialties.

Virtual solutions can also serve your workforce. They can deliver mental health support to your staff in 24 hours or less. They also create employment options for workers with mobility issues or for those who would rather work from home. Virtual care provides an opportunity for senior nursing staff to contribute virtually and to train the next generation.

These strategies can increase retention, reduce the cost of hiring and training, and expand your capacity to serve.

“We’re seeing our more mature nursing staff take a step back from the bedside and join our virtual ICU program. We’re keeping that experience and helping to train the next generation of nursing staff.”

Teladoc Health client



INCREASE IN PROVIDER
SATISFACTION LEVELS¹

Planning for an integrated workforce

Virtually integrated care is not just a technology implementation, it is also a clinical implementation. Clinician buy-in is crucial for a successful integration. Yet, only 39% of chief medical information officers believe their organization secures sufficient clinician buy-in before implementing a new technology.² Workflows need to be standardized for ease of use and efficiencies that scale. The technologies should require EHR integration and consider legal, regulatory, security and privacy concerns. Most importantly, planning requires the change management strategies that can shift the culture to accept innovation.

Questions to ask:

1

How can you grow in an asset-light way so that you don't need to own bricks and mortar or hire new staff to expand to a new market or use case?

2

Could remote work options increase employee retention?

Does this open up virtual support from disabled or aging staff who can't sustain a long physical workday?

3

What would be the economic impact of increasing your nurse-to-patient ratios while still maintaining the same levels of quality and patient satisfaction?

4

What would be the economic impact of increasing speed to care by 600%.³

5

How open is your staff to using virtual technology?

What change management support do you need to evolve?

Workforce change management

- ✓ Include clinicians early in the planning and decision process
- ✓ Consolidate point solutions to mitigate solution fatigue
- ✓ Promote the features that benefit your employees
- ✓ Make continual learning and support a cultural value

More workforce challenges resources



Emergent care

Case study: Hackensack Meridian speeds response times, and delivers around-the-clock access.



Inpatient care

White paper: The financial impact of having telehealth capabilities in every patient room.

Explore more at
TeladocHealth.com/workforce-challenges

Leading with consumerism

The frictionless consumer experience.

Consumers have been clear. They want affordable, on-demand access to a personalized, whole-health experience and are willing to switch providers to find it. And, 53% of health leaders ranked supporting consumer loyalty as their top goal for digital health strategy.⁵ For the past few years, new kinds of competitors have been responding to this market demand—applying their own digital and data-driven expertise toward meeting the health needs of their consumers. So far, these novel alternatives have operated mainly in areas of low acuity. But services already exist to meet consumers in any environment and in every phase of the health experience.

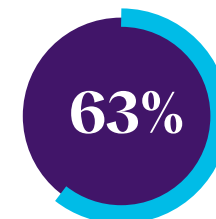
Hospitals and health systems have other advantages. They have deep community relationships, a strong local presence, and are most able to build a whole picture of their consumers' health needs and experiences.

Building a truly unified and friction-free experience will require virtual integration at every stage of the consumer's health journey. This includes shopping for care; choosing their doctor; wellness visits; engaging in urgent, emergent or in-patient care; managing conditions; and making their payments.



“We're not going to win the consumers unless we win the providers. And we're not going to win the providers unless it's a friction-free experience. That's what we have to do. We have to execute on the technology to make it really easy to use.”

Judd Hollander, Senior Vice President, Health Care Delivery Innovation at Thomas Jefferson University



OF CONSUMERS ARE
INTERESTED IN BROADER DIGITAL
HEALTH SOLUTIONS.⁶

Opening the digital doors to consumer-centric services

Hospital and health system leaders recognize they must evolve their organizations systemwide to deliver on consumer-centricity. They also need to identify the partners that can engage with their complete care continuum and help them connect to an experience that spans the full consumer journey.

To activate a seamless, human-centered care model design requires a reliable technology platform. An integrated digital front door addresses the complete scope of needs while remaining flexible enough to match the system's capacity to scale, and the specific needs of the patients they serve.

Questions to ask:

1

Do you have a holistic view of your consumers and can you segment by need and preferences?

2

Does your health system excel in community engagement and visibility before and after consumers are sick enough to be a "patient"?

3

Are you waiting for consumers to come to you, or are you finding ways to meet them where they are?

4

What are the financial risks to the organization if a new competitor arrives in the community and begins to own that relationship with the health consumer?

5

Do you have a plan to build on existing capabilities and integrate virtual services across the care continuum?

Guiding the change

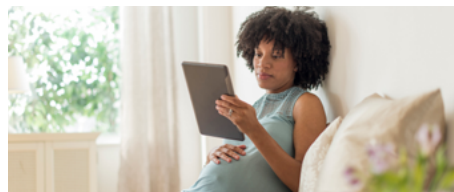
- ✓ Assess the rate of virtual health modernization occurring in your market
- ✓ Calculate how offering consumers more choices will impact access, engagement and outcomes
- ✓ Build clinician and consumer satisfaction goals into planning
- ✓ Offer as many or as few services as needed to stay competitive and invest in services at the right pace

More consumerism resources



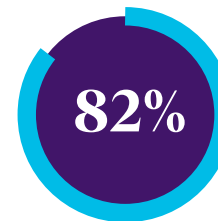
Consumer care

Case study: WellSpan Health's on-demand telehealth program doubled their enrollment goal in six months.



Care access

Case study: Blessing Health System's school-based program delivers care while keeping kids at school and parents at work.



OF LEADERS REPORTED IMPROVING ACCESS TO CARE AS THE MOST IMPORTANT OUTCOME FOR DIGITAL HEALTH INVESTMENTS.⁷

Explore more at
TeladocHealth.com/consumerism



Empowering health equity for everyone, everywhere

How integrated virtual health is advancing quality care for all.

For over two decades, Teladoc Health has been building the virtual care systems that continue to expand equitable access to care. Multiple factors create barriers to care. Individuals with disabilities and individuals without transportation, the funds for necessities, or the ability to take time off from their job often find these hardships preventing them from seeking care.

Access challenges can also entail language barriers and cultural disconnects. Building better health equity decreases appointment cancellations, increases patient engagement, and empowers access for all patients.

Digital care tools can capture a more complete view of each patient's social determinants of health (SDOH). Telehealth offers a new, useful view to help combat inequities that were previously overlooked through traditional modes of care. SDOH are easier to detect when you're looking at an individual in their home versus when they walk into an office and sit on the same table where you've seen every patient.

“The case cancellation rate for a telemedicine appointment is half what it is for an in-person appointment in the last 24 hours prior alone.”

Teladoc Health client

\$230 billion

HEALTH EQUITY CHALLENGES ARE RESPONSIBLE FOR \$230 BILLION IN AVOIDABLE MEDICAL COSTS SUCH AS LOST PRODUCTIVITY AND PREVENTABLE DEATHS.⁸

The benefits of telehealth and integrated care

Health organizations have an important role to play in combating the digital divide. Identifying virtual tools to measure disparities, conquering affordability gaps, offering digital navigators and financially supporting access to broadband and devices are narrowing the gap.⁹ Cultural and language barriers in clinical settings are also being circumvented through ambulatory telehealth services and interpreters integrated into the virtual experience.

Questions to ask:

1

What are your plans to better democratize access to quality healthcare across the communities you serve?

2

How can a virtual-first approach to care help eliminate the geographical, economic and social boundaries that have historically limited access?

3

How can you make care available in more languages?

4

What can you do to expand the breadth of demographic and ethnographic data to better understand factors driving disparities in health outcomes?

5

Can you offer care by landline for people with visual impairment and for communities that lack internet connectivity?

Adopting the shift to equity

- ✓ Include consumers in key discussions on how to build systems to overcome economic and social determinants of health
- ✓ Create community-based partnerships that expand initiatives for equitable care access
- ✓ Hire clinicians with diverse backgrounds; address and train for cultural preferences
- ✓ Create guides and universal messaging to establish common language around equality and inclusion

More health equity resources



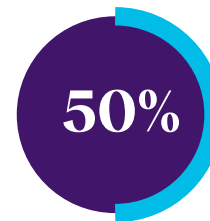
Consumer care

Ebook: Teladoc Health has provided over \$18 million in aid to enable mental health therapy for low-income consumers.



Rural access to care

Case study: To extend the reach and impact of its pediatric specialists, Children's Mercy established four telehealth-enabled clinics throughout Kansas and Missouri.



OF HEALTH OUTCOMES CAN BE ATTRIBUTED TO NON-CLINICAL SOCIAL BARRIERS.¹¹

Explore more at
TeladocHealth.com/health-equity

Expanding through new models of care

Creating digital health models tailored to treat the whole person.

Virtually integrated care models can meet patients where they are—physically and anywhere along their health journey. The most advanced new models strengthen care coordination, resolve workforce challenges, tackle health inequity, and generate the cost savings and care consistency that allow hospitals and health systems to grow.

Telehealth is integrating new models across the care continuum. 24/7 availability for urgent, primary and mental care needs opens critical digital doorways to a broader population. This eases stress on patients and caregivers, and allows health systems to use resources for necessary in-person visits.

Virtual chronic care management brings care services into the home. These models reduce the cost and trauma associated with unnecessary emergency visits, hospital readmissions and disease advancement.

And, in acute care, new models virtually transport specialists into emergency settings, operating rooms and intensive care locations, adding expertise and guidance for staff. Inpatient virtual solutions also connect providers, specialists and pharmacists into one well-coordinated team to share insights and close gaps.



“At SLUHN, our clinicians have the luxury of one collaboration system across the entire network, bringing everything together in one presentation. It’s a simplified approach that helps to reduce the stress of the practice of medicine on the clinician.”

**James Balshi, MD, Chief Medical Information Officer and Vascular Surgeon,
St. Luke’s University Health Network**



OF PATIENTS WILL BE ACCESSING
SERVICES THROUGH A DIGITAL
FRONT DOOR.¹²

Pulling in-person and virtual care together

Technology alone cannot bring integrated care models to life. Health systems need wrap-around, in-person functions that support virtual care technologies. In planning, leaders gain advantages by using a virtual health decision framework that quantifies and measures the associated risks and rewards of potential new care models.

Integrated virtual care also unifies disparate systems, apps and workflows into a single-entry pathway, enabling patients and clinicians to navigate care with maximum convenience and efficiency. Without integration across care channels and patient touchpoints, organizations face siloed data, contradictory care and a fragmented patient experience.

Questions to ask:

1

What opportunities or risks do you see with a virtual-first approach to primary, urgent, chronic or acute care?

2

How are you approaching the increasing opportunities and risks around care at home?

3

How well are you integrating clinical and communication components with each other and the electronic health record system?

4

Do you have a single unified platform that can support integrated care models across the care continuum?

5

What partnerships and experience will you need to guide, advance or accelerate your efforts?

Establish a foundation for success

- ✓ Confirm your organization's current level of virtual health maturity
- ✓ Define a framework you can use to evaluate the effectiveness of new models
- ✓ Build a scalable and sustainable implementation roadmap
- ✓ Apply best practices and lessons from implementations in like organizations

More new models of care resources



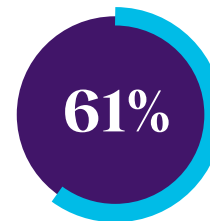
Inpatient care

Spotlight: Reimagining the Inpatient Experience: The Value of an In-Room Telehealth Strategy.



Planning

White paper: Making Telehealth the Enabler of Connected Care.



OF ORGANIZATIONS ARE EXPANDING THEIR TELEHEALTH PROGRAMS, OFFERING MORE SERVICES AND HIGHER VALUE.¹³

Explore more at
TeladocHealth.com/new-models-of-care



Achieving growth and scale

An integrated virtual health platform can sustain a dimension of virtual care that flows seamlessly across a broad continuum of environments, specialties and services while rationalizing an organization's technology stack. It can help expand a system's market footprint, deepen their capabilities and fend off new competition by keeping health consumers engaged.

Once established, integrated virtual care allows hospitals and health systems to scale new models without being resource-intensive. For example, it can generate significant savings when doctors and nurses across a system can virtually see more patients and provide more services without physically having to travel.

Connectivity with a health system's electronic health record offers more scalable advantages. The analytic insight generated by the powerful combination of virtual and in-person data can best anticipate the needs of chronic care populations, strengthen triage and referrals for emergent concerns, and support personalized, accessible care for every health consumer—all key elements in achieving quality, satisfaction and cost-savings across the entire enterprise. And virtual services can scale up or down as the market demands to ensure resources are deployed most appropriately.

“Keeping consumers at the center of what we do allows us to scale virtual care in a relevant, high-impact way.”

Teladoc Health client



SCALING BEST PRACTICES
FROM OVER 1,500 TELEHEALTH
IMPLEMENTATIONS¹⁴

Making the move from point solutions to scale

To-date, most systems have invested in one-off virtual solutions that likely met a focused need but further fragmented the care experience. As hospitals and health systems move forward, these solutions need to be consolidated into a consumer-centric care delivery system. And before they scale, the organization should meet the key performance indicators of advanced virtual health maturity. Health systems can begin with a self-assessment of their governance, data and technology, payment arrangements, financial workflows, and how well their culture encourages the use of new technologies.

Questions to ask:

1

What are your strategies to gain commercial market share?

Will you expand your footprint or add services within existing markets?

2

Who else in your market is showing signs of readiness to scale their virtual health capabilities?

3

How does your culture approach transformation?

Is it a "fail fast and fail forward" or a "crawl, walk, run" model of technology implementation?

4

How do you determine your organization's readiness to scale new models?

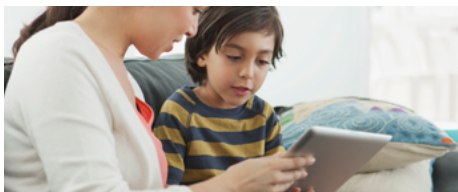
5

How does your organization define productive partnerships in virtual health?

Prepare for sustainable growth

- ✓ Assess current levels of organizational virtual maturity in governance, data and technology management, financial sustainability and clinical integration
- ✓ Appoint centralized leadership to oversee virtual integration and protect the organization from further fragmentation
- ✓ Ensure consistent deployment across the organization as you consolidate point solutions

More growth and scale resources



Planning

Video: Services and support at every step of the healthcare journey.



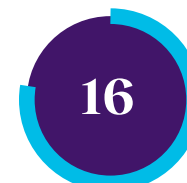
Virtual integration

Research report: The Future of Integrated Virtual Care: Closing the Gap to Goal

Locations available per physician



ON SITE



THROUGH
TELEHEALTH¹⁵

Explore more at
TeladocHealth.com/growth-and-scale

Supporting the shift to value-based care

Integrated virtual health makes sense in a fee-for-service environment while providing hospitals and health systems with a care model to support value-based contracts. Under either reimbursement structure, these address the quadruple aim, increase brand loyalty, strengthen strategic partnerships and set the stage for growth.

Improve quality and outcomes

Virtual data collection helps to build a more holistic picture of the patient. And, 24/7 monitoring can more quickly detect unseen conditions or sudden changes in patient health. Convenient access to care and virtual prompts deliver the ongoing guidance that helps people stay healthy and out of the emergency room. Electronic health record integration improves the care coordination that leads to more timely interventions.

Increase satisfaction

All consumers appreciate shortened wait times, swift access to specialists and outcomes that keep them from going back to the hospital. They want to reign in the impact of their chronic conditions with personalized care that matches their health condition and their lifestyle.

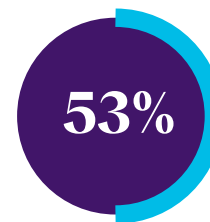
Gain operational efficiency

A secure cloud gives providers access to tools that streamline remote consultations while easing the burden on IT resources. Digitally connected pathways can improve triage and referral processes. Enterprise-wide virtual integration speeds services, expands capacity and lowers costs.



“Technology is more scalable than human interventions. It improves access, expands capacity and is a more acceptable operating strategy in spaces with variable need.”

Health system leader



OF SURVEY RESPONDENTS SAID THEY ARE INTERESTED IN WORKING WITH A TELEHEALTH VENDOR TO REDUCE READMISSIONS AND TO HELP MONITOR PATIENTS WITH CHRONIC CONDITIONS.¹⁶

A virtual path to value-based arrangements

A thoughtful, strategic approach allows hospitals and health systems to design, test and scale population health strategies without adding brick-and-mortar investments or staff. One no-risk first step that leaders can take is to create a strategic roadmap. The map should maximize existing investments to expand capacity and geographic footprint, while extending service time frames to match consumer preferences. Then, leaders should ensure virtual solutions enable the predictive modeling that helps anticipate demand to ensure resources are deployed most effectively.

Questions to ask:

1

What % of your revenues are under a risk-based arrangement today, and where do you expect that will be in 2 years?

2

How important is it to your organization to expand direct-to-employer contracting?

3

What are the risks if you fail in supporting your value-based care arrangements?

4

How might a virtually integrated hospital-at-home program reduce costs and improve satisfaction for your chronic populations?

5

How might your virtual care data be leveraged when negotiating value-based contracts?

Mapping the path to value

- ✓ Measure quality across the entire consumer journey, translating data into actionable insights that can guide planning
- ✓ Explore all available ways to leverage existing technology investments
- ✓ Begin with services that build comfort and confidence, such as virtual mental health
- ✓ Identify partners that can help meet the widest array of needs specific to your population

More value-based care resources



Planning

White paper: Making Telehealth the Enabler of Connected Care.



Chronic care

Infographic: See how whole-person chronic condition management solutions perform better than point solutions for people living with multiple conditions.

100%

CMS' GOAL IS TO HAVE 100% OF REIMBURSEMENT TIED TO VALUE-BASED CONTRACTS BY 2025.¹⁷

Explore more at
TeladocHealth.com/value-based-care



The future is happening now

Everything in health is interconnected. Our challenges do not exist in isolation, and neither should our solutions.

As leaders map out their vision for the next few years, they will consider opportunities for growth and the emerging threats to their competitive edge. Right now, every healthcare system in the country is considering how virtual care can serve their purpose. And health plans, employers and new market entrants are already advancing.

Hospitals and health systems either will continue to maintain point solutions and further fragment the experience or will develop skills and partnerships that can help them deliver personalized care in any environment, harness data analytics through a single platform, and scale into high-performing systems that improve the health of whole communities.

Integrated, virtual care is the next evolution of healthcare delivery. In fact, it's already here.

“Healthcare is shifting and the theme coming about is to meet patients where they are.”

**Adam Cherrington, Director
for Patient Engagement and
Telehealth at KLAS Research**

¹Teladoc Health client data.

²The Health Management Academy. The Future of Integrated Virtual Care: Closing the Gap to Goal.

³Teladoc Health. Published 2016. How to decide if you should build or buy your Telehealth Solution.

⁴Teladoc Health client data.

⁵The Health Management Academy. The Future of Integrated Virtual Care: Closing the Gap to Goal.

⁶Teladoc Health. 2018. Strategy, Approach Help WellSpan Move Quickly into Telehealth.

⁷The Health Management Academy. The Future of Integrated Virtual Care: Closing the Gap to Goal.

⁸National Institutes of Health. 2022. The health equity mandate. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8760927/>.

⁹New England Journal of Medicine. March 24, 2022. Digital Inclusion as Health Care — Supporting Health Care Equity with Digital-Infrastructure Initiatives.

¹⁰Teladoc Health. Filling the gap with virtual solutions.

¹¹Advisory Board. Ensure equitable biopsychosocial care for all patients. Published 2022. <https://www.advisory.com/topics/health-equity/2021/07/ensure-equitable-biopsychosocial-care-for-all-patients>.

¹²IDC FutureScape. October 2020. Worldwide Health Industry 2021 Predictions. <https://www.idc.com/getdoc.jsp?containerId=US45834920>.

¹³Teladoc Health. 2022 Telehealth Benchmark Survey.

¹⁴Teladoc Health. Published 2018. Strategy, Approach Help WellSpan Move Quickly into Telehealth.

¹⁵InTouch Health. Published 2016. How to decide if you should build or buy your Telehealth Solution.

¹⁶Teladoc Health. 2022 Telehealth Benchmark Survey.

¹⁷Revcycle Intelligence. November 2, 2020. Transitioning to Value-Based Care While Reducing Risks.



LEARN MORE: TeladocHealth.com | engage@teladochealth.com

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.

Teladoc[®]
HEALTH