

## HOW HEALTHCARE IS RISING UP TO MEET CONSUMER EXPECTATIONS

Provider leadership survey reveals expanding digital health strategies amid changing patient perceptions



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**Inching along for decades**, the healthcare industry has finally reached a fever pitch in its effort to deliver an exceptional patient experience matching that of top consumer brands. Hospitals and health systems are moving away from transactional patient experiences to promote patient engagement and wellness while growing lifelong customers. “What’s more, they are pursuing these changes through enhanced digital health strategies that center around omnichannel intelligent engagement and communication technology,” says Peter Durlach, EVP and chief strategy officer at Nuance.

Durlach says the trend to elevate the patient experience took flight three years ago as providers shifted from traditional patient satisfaction surveys to a digital front door experience. “Obviously, COVID-19 and the explosion of virtual care has accelerated massive change,” he adds. “Recent data is quite amazing, showing a 40% jump in patients who switched providers due to a bad patient experience. On top of this, nontraditional providers of care are entering healthcare at an accelerated rate, which is increasing pressure to improve the patient experience.”

Mark Kandryawtz, VP and chief innovation officer at WellSpan Health, a regional health system in southcentral Pennsylvania, shares similar views. Today, he says, healthcare is still catching up to other industries to understand what is informing consumer expectations. “The path to get there is not only leveraging what we’ve learned from the pandemic, but taking this momentum to make giant leaps forward if we want to get ahead.” He and Durlach agree that healthcare leaders must prepare their organizations for a new future by designing solutions that drive frictionless, personalized consumer experiences.

**“We’re not just taking what we used to do and digitizing it. We’re leaping ahead to meet consumer expectations based on the technologies they use every day.”**

—Mark Kandryawtz, VP and chief innovation officer at WellSpan Health



Leadership survey highlights strategic and digital priorities

In a recent HealthLeaders survey supported by Nuance, 111 healthcare executives—including CEOs and clinical, operations, IT, and financial leaders from provider organizations and other healthcare entities—offered critical insights into patient experience trends and digital health initiatives. Ninety-one percent of respondents rank the patient experience and the consumerization of healthcare as a vital strategic priority. In fact, it ranked third, behind only patient safety (97%) and cybersecurity (91%). “The competitive pressures on traditional healthcare providers have gone up significantly, and that all feeds into this ranking,” says Durlach.

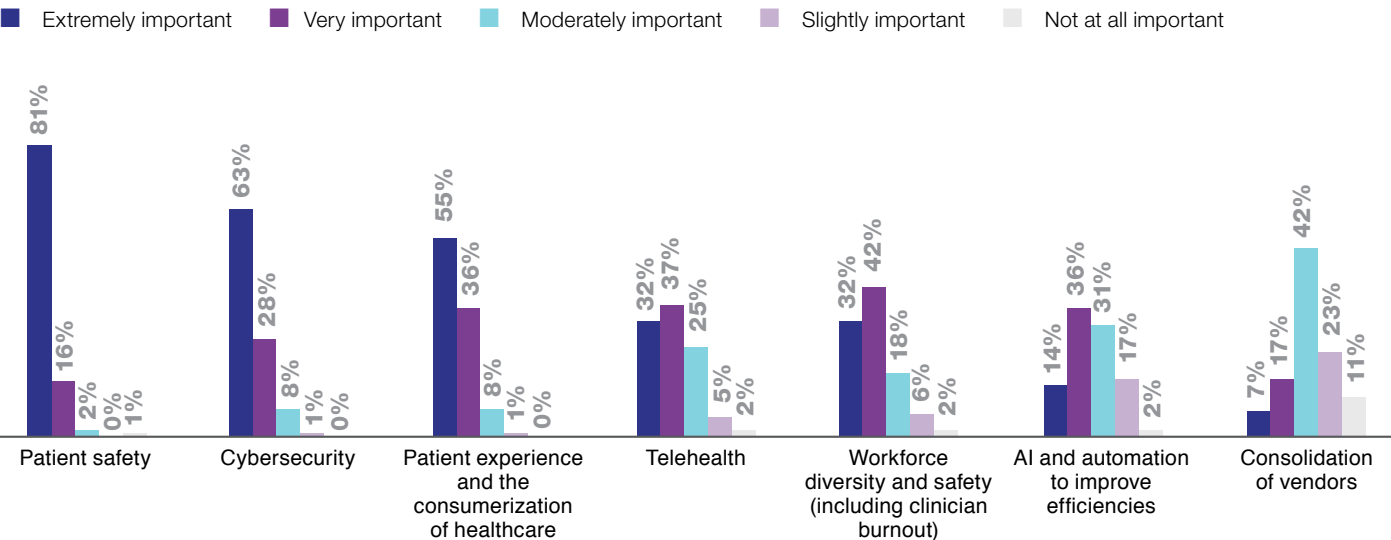
Kandrysawtz says WellSpan ranks its strategic priorities similarly. “Patient safety is number one—this translates into being a highly reliable, high-quality organization, with the patient experience and consumerization as an extension of that.” He adds it isn’t enough to focus only on clinical care quality. “We also have to be highly reliable when it comes to patient access and experience, and we are doing this by making healthcare easier and more convenient to use.”

Changing consumer expectations

Kandrysawtz and Durlach agree that patient needs have changed significantly in recent years as experience and convenience outside of healthcare continue to improve. “Our ability to have the products we want delivered within the same day has changed consumer expectations in healthcare,” says Kandrysawtz. Patients want convenience in managing their care. “The pandemic has also accelerated this idea of services being more instantaneously available at home, including being able to engage online with a provider,” he adds.

Changing patient expectations are leading to greater innovation across healthcare and a focus on relevancy and personalization. “Healthcare is designing solutions for specific consumers and

ORGANIZATION’S STRATEGIC PRIORITIES  
Please rank the importance of the following strategic priorities for your organization.



BASE: 111 (RANKED BY EXTREMELY IMPORTANT)

specific conditions like remote patient monitoring, chronic care disease management at home, convenient care for working moms, and services for portions of the community who live further away,” Kandrysawtz says.

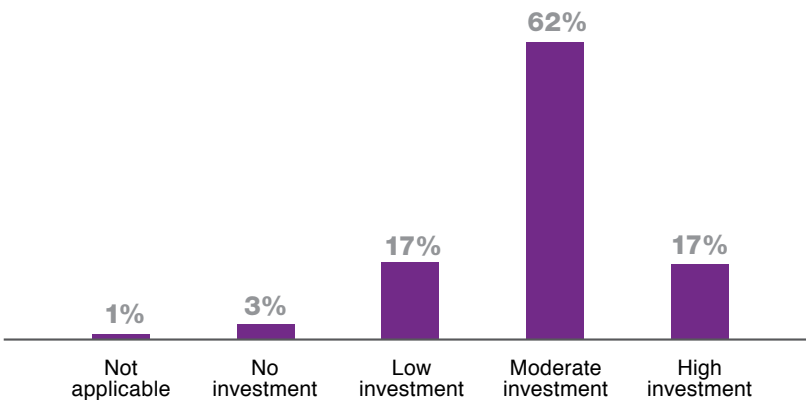
It’s no surprise then that healthcare organizations are making significant investments in patient engagement. According to the survey, 79% of respondents say their organizations are planning moderate or high investments in patient engagement solutions. “We’re investing in new platforms of capability while removing inefficient, analog modes of patient engagement from overburdened care teams,” says Kandrysawtz. “We are doing it more systematically and with better data, engaging patients across the system through automation.”

Designing a modern digital health strategy

Healthcare leaders also weighed in on what comprises a superior digital health experience, giving top ranking to billing or copay collection (45%), followed by prescription refill (41%), appointment reminders (36%), appointment follow-up and education (36%), and support for patient portal use (35%).

“Enhancing digital patient access capabilities to include things like appointment reminders and follow-up is top of mind for healthcare providers,” says Durlach. “Leading consumer brands, such as FedEx, CVS, Walgreens, and JP Morgan, are also showing similar trends.” He says billing and copay collection are also essential to survey respondents and most health systems due to the rise of self-paying patients. “It’s a huge financial issue for health systems, which are looking for easier ways to collect.” Patient portal use is another high bucket area, Durlach says. “As healthcare moved patients to virtual care platforms during the pandemic, portal use skyrocketed, crushing internal teams with high volumes of support calls. Healthcare organizations are using technology to address these common pain points and ease the labor strain.”

INVESTMENT IN PATIENT ENGAGEMENT SOLUTIONS  
What level of investment does your organization intend to spend on patient engagement solution(s) in the next 12–18 months?

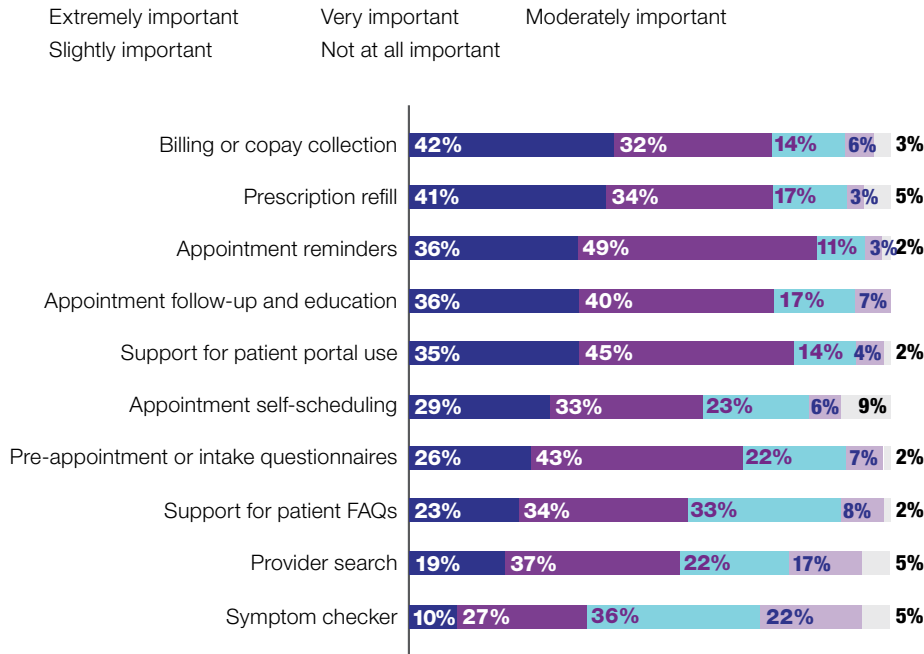


BASE: 111

“These results show me that the industry is still struggling to get the basics right,” says Kandrysawtz. “Variation in the consumer experience prevents our consumers from becoming expert users of our services and from having the confidence to engage with us,” he adds. “Variation dilutes the value of digital experiences. So, the more we can adopt the new digital model as the primary way of paying a bill, refilling a prescription, and managing appointments, the quicker our consumers will be more confident to engage with us.”

## COMPONENTS OF SUPERIOR DIGITAL HEALTH EXPERIENCE

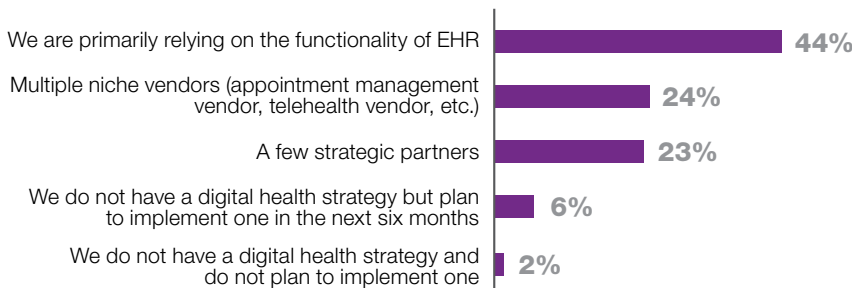
Please rank the importance of the following components toward delivering a superior digital health experience.



BASE: 109

## DIGITAL HEALTH STRATEGY EXECUTION

How are you executing your digital health strategy today?



BASE: 111

For several years, WellSpan has delivered a frictionless self-scheduling and online scheduling experience, and now it has rolled out more advanced features and functions that support consumers, says Kandrysawtz. For example, WellSpan can deliver radiology studies, including x-rays, the same way it delivers other tests and diagnostics to the consumer. “This is a good example of being a market leader,” he says.

When it comes to today’s execution of digital strategy, the majority of respondents (44%) say they rely on the functionality of their EHR. Respondents also use multiple niche vendors (24%) or a few strategic partners (23%). “We are trying to get the most value out of our EHR, and we understand that we create value for our consumer by committing to this foundational operating platform and building on it,” says Kandrysawtz. “We are maximizing the functionality that we get out of the box, and we’re making smart strategic choices with partners and vendors solutions that will work in that ecosystem.” For example, during the pandemic, WellSpan flexed its EHR’s functionality to deploy rapid vaccinations across its communities, he says.

## The new digital front door

Durlach says modernizing digital front door technology is a top-three initiative for most health systems today due to increasing competitive threats. Survey respondents shared how they define the modern digital front door, with 32% saying it is personalized care, patient engagement, and easy access to information—28% say it is a unified patient experience, connecting digital and non-digital parts of the journey, while 21% say the digital front door optimizes front-end processes, including provider matching and referrals.

**“AI strengthens the digital front door patient experience by supporting a multitude of touch points that allow patients to accomplish tasks, whether it’s booking appointments, scheduling a follow-up, or understanding their diagnosis. You can’t hire enough people to do that manually because when consumer engagement increases, the number of interactions skyrocket.”**

—Peter Durlach, EVP and chief strategy officer at Nuance

“I don’t think any of the responses are mutually exclusive,” notes Kandrysawtz. “Modernizing digital health strategies and solutions helps meet patients where they are and engages them in their own health, promoting lifelong wellness while driving down costs.”

Kandrysawtz and Durlach agree that AI is critical to improving the patient experience and supporting the digital front door. “AI strengthens the digital front door patient experience by supporting a multitude of touch points that allow patients to accomplish tasks, whether it’s booking appointments, scheduling a follow-up, or understanding their diagnosis,” says Durlach. “You can’t hire enough people to do that manually because when consumer engagement increases, the number of interactions skyrocket.”

Kandrysawtz says AI is enabling WellSpan to minimize technical complexity as part of its digital strategy. “We are creating a consistent and pleasing technology experience for our customers by setting clear expectations for our technology solutions. AI improves the patient experience because it makes otherwise complex self-service tasks effortless,” he adds. “For example, instead of having to find the right web page or log into several different tools and technologies and apps, our healthcare consumers can have a conversation that feels human and value-adding and can get a task done fast.”

Kandrysawtz says WellSpan’s vision is to leverage natural-language AI across multiple channels to allow dynamic consumer interaction. “This includes rescheduling an appointment on chat, addressing a new health concern via text message, or even interacting with a home assistant like Alexa or Siri to manage appointments, refill prescriptions, and find a new physician,” he explains. “We believe that we can do it in a way that takes advantage of how consumers prefer to engage. We’re not just taking what we used to do and digitizing it. We’re leaping ahead to meet consumer expectations based on the technologies they use every day,” he says.

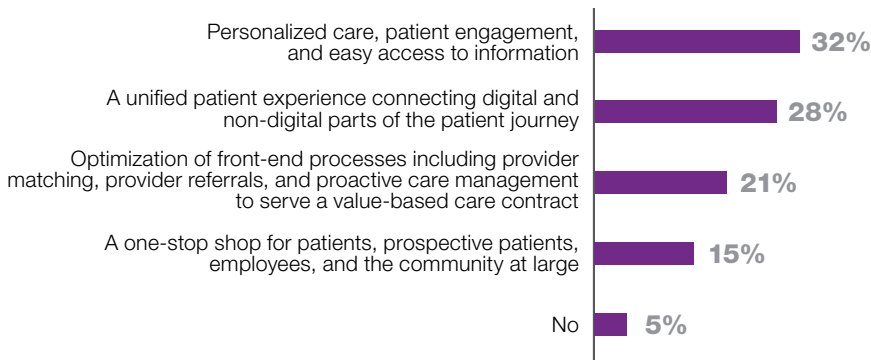
“For the 80% of the transactional tasks that patients do to manage their own health daily, we’re trying to remove all the barriers, making it as simple as possible, like a simple text message, while allowing them to accomplish as much as possible,” says Kandrysawtz. “The real power behind AI is it provides the efficiencies of automation with the pleasing experience of a more adaptive and intelligent technology. We will also offer other communication modes that allow consumers to go deeper in complex situations.”

Readying your organization for the future

Healthcare organizations must continue to make strategic investments that make it easier, more convenient, and more cost-effective for patients to interact with them, says Durlach. “Patients and consumers want an omnichannel experience with a consistency across all engagement channels,” he

adds.” Provider organizations can dramatically improve consumer engagement through a modern phone system, a mobile device, a website, and automation. “Consumers know this and expect an easy, seamless—and in most cases—a self-service interaction with their provider,” says Durlach. “We have an opportunity to learn from other industries to deliver a great experience, and we have to because they’re setting the expectation of consumers.” ■

MODERNIZING DIGITAL FRONT DOOR  
What does modernizing healthcare’s digital front door mean to your organization?



BASE: 111

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