



Reframing patient  
experience: how US  
health executives  
are transforming  
care models



# Executive summary

In February 2021, the EY organization convened 10 executives from top US health organizations for a dialogue around the future of patient experiences and lessons learned since the start of the COVID-19 pandemic. With health providers and payers at a key inflection point on the role smart technologies can play alongside non-digital interactions, everyone agreed that better consumer experiences are on the horizon.

During this virtual roundtable, the key trends and themes that emerged from the conversation provided insight into how the US health ecosystem is transforming in new ways to provide a smart health experience for now, next and beyond.

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Although each roundtable had a unique and locally relevant focus, underlying each discussion was the driving theme of the technology-driven reset of health care that we have seen in the past year.

## Topics included:

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|--------|--|
| Now    | Adoption of technology to enhance the patient experience |
| Next   | Overcoming obstacles to transform operating models       |
| Beyond | Sustaining the transformation                            |

# Now: adoption of technology to enhance the patient experience

Health organizations are recognizing that health care consumers expect a customer-oriented experience similar to what they receive from today's e-commerce giants. That realization is among many factors driving the rapid adoption of technologies to enhance patient experience and personalization. Participants agreed that before COVID-19, the health industry had lagged most other industries in integrating its digital platforms with physical-world experiences.

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However, the industry is now rapidly moving to meet customer expectations and bring industry capabilities up to speed. Even before the pandemic, several patient-oriented companies had made the health care experience more personal, convenient and virtual for their customers. Over the last year, the rapid pivot to virtual care and telehealth means that the health industry as a whole is ready to double-down on the strengths of virtual interactions and digital technologies to meet consumer demands.

A case study shared during the roundtable centered on how combining a suite of services with appropriate technologies has created significant value for patients. In this example, the organization uses machine learning to trigger automatic outreach, power chatbots and automated scheduling, and combine them with regular wellness visits. The system can then identify a patient who missed a screening or test, such as a routine mammogram or a check for prediabetic A1C levels, and perform an automated scheduled appointment with the option to speak with a specialized educator.

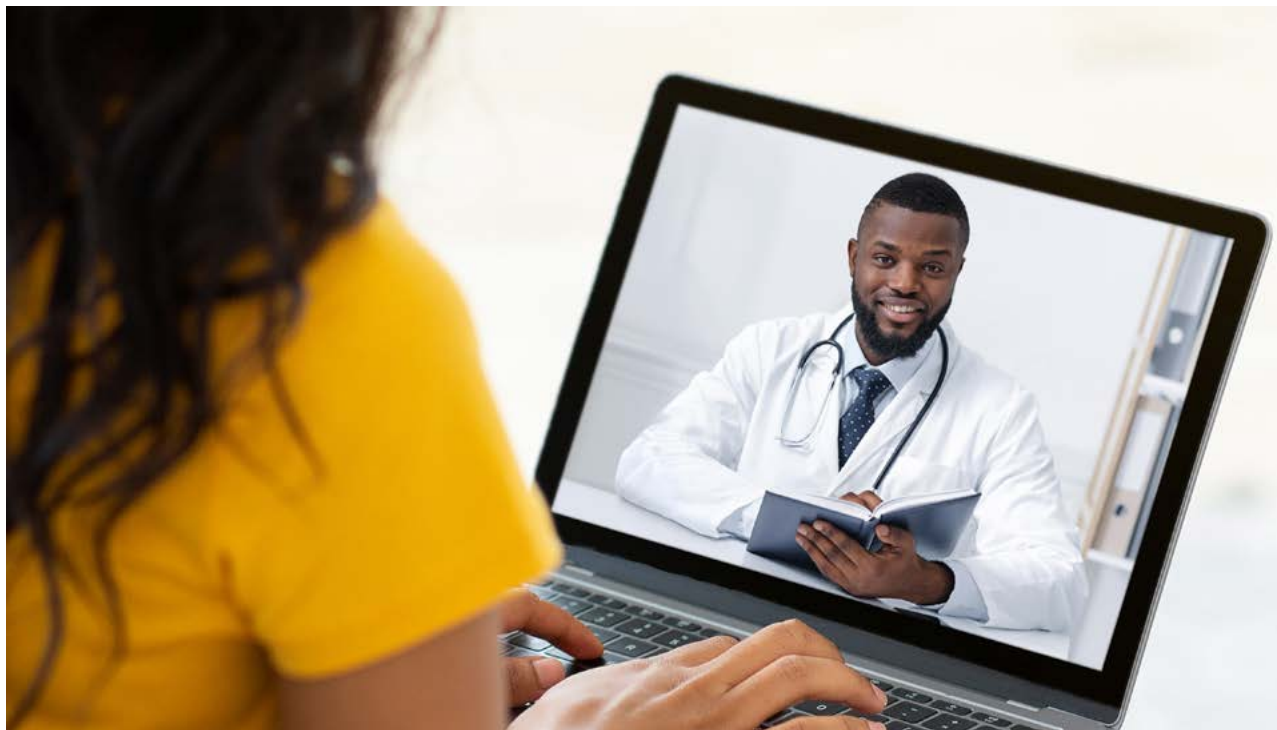
The importance of gathering, combining and sharing high-quality and relevant data was also a point of discussion. Another case study focused on a systematic approach to collecting better data on patients. Better data can enable the health care organization to reach better clinical decisions and stratify care. The academic medical center under discussion had begun profiling patients several years ago to design a process that captured patient perspectives more efficiently. The medical center uses tablet computers to collect more multidimensional information about its patients during check-in. They ask about the patient's emotional distress levels, pain levels, physical functioning and social functioning, among other items. The organization believes that it now has one of the largest patient-reported outcomes data sets in the nation and is using this information as a foundation for machine learning. The initiative dramatically improved care decisions and has enabled the medical center to match the right provider or the right intervention to the right patient at the right time and place.

Another topic centered on social determinants of health (SDOH), defined as non-medical factors that influence health outcomes and health equity. Participants discussed the critical role of technology in tackling inequities. One case study described a coordinated and strategic approach to capture and use the data on SDOH to improve patient experience and care delivery. The health system discussed leveraging a user-friendly survey to capture holistic information about a patient and integrate it into its electronic medical record (EMR). The technology platform allows for efficient and instant electronic referrals and alerts to better track and coordinate resources for a patient's health needs that can arise outside of the clinical domain. The focus is on driving real-time, actionable insights for six or eight SDOH parameters that are well understood, such as housing, food security and transportation, among others, and are vital to delivering better health outcomes for individuals and communities.

The value of integrating the patient's voice in health system strategic decisions and informing improvements also was discussed. Listening to patients, understanding

their needs and prioritizing them over health system expediencies has proven valuable. One case study demonstrated how a health system improved the patient experience by leveraging multiple channels and engaging with the patients according to their preferences. It had become clear that most patients preferred text messages over logging into a web portal. So, the organization set up a secure system that enabled appointment scheduling and clinician interactions via text messaging.

The role of voice technology in creating smart hospitals also entered the dialogue. Akin to digital voice assistants such as Alexa or Siri, voice technologies are allowing medical professionals to enhance the way they interact with patients and technology. Participants in the roundtable learned how voice technology can improve operating room efficiency when surgeons can give voice commands instead of typing or clicking on a computer during surgery. One health system is experimenting with ambient listening technology in a clinical setting, capturing doctor-patient interactions and importing it directly into the EMR.



# Next: overcoming obstacles to transform operating models

While COVID-19 has ushered in a new era of virtual care and telehealth, several concerns arise concerning the quality and health outcomes achieved by virtual care. Participants discussed the importance of maintaining quality in digital care delivery while balancing savings and convenience.

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For example, blood pressure typically cannot be measured in most telehealth visits. Failure to detect, diagnose and treat hypertension promptly is a clinical concern. Another challenge is the potential for physicians to order more tests than they otherwise might, which can increase costs and inefficiency. There's also a significant potential for increasing health inequities, since accessing virtual care requires a smartphone or computer, internet access and digital literacy, as well as health insurance. Considering that there are several regions in the United States where broadband coverage is inadequate, digital inequities could heighten health care disparities.

An important aspect of the smart health journey is measuring the customer or patient experience. One participant shared how their health system measures the quality of care. The system has created a "compassion composite score" across service lines that combines traditional patient satisfaction values and results in an overall score for the inpatient environment, home health and the medical group. Roundtable participants also discussed challenges with data, specifically the variability of data capture, data quality within EMRs and the lack of holistic data on patients, making it difficult to deliver highly personalized care and interventions promptly.

Finally, the sentiment among participants was clear that while the examples discussed during the event are steps in the right direction, delivering an authentic smart health experience is still off in the future for many.

# Beyond: sustaining the transformation

A patient-centered approach combined with technology advancements and data can genuinely transform the traditional health care model, resulting in improved quality of care and better patient experience while potentially reducing costs and burden on the workforce. However simple and straightforward the transition may sound, it entails changing the existing culture and traditional ways of working.

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Roundtable participants agreed that while their institutions are moving forward with new technologies and services for their patients, their care models can still be rooted in the past. Modernizing care models to better align with new technologies and approaches is a significant challenge facing health organizations. Closer alignment between the digital transformation activities and workflows of caregivers and care teams also is essential to building the capability to predict the clinical and financial outcomes necessary to embrace value-based care truly.

The following summarizes key considerations for executives focused on digital health and patient experience:

1. Integrate the patient's voice: Technology is not the panacea. Keep patients at the center of the digital transformation; gain a holistic understanding of them; and understand their unmet needs, preferences and challenges. The right technology can then address those needs and enhance the overall experience.
2. Redefine care models: Evolve care delivery models to meet a patient's needs across the care continuum. Shift from a narrow focus on a patient's disease states to a broader focus on the health of populations, including considering the social determinants of health.
3. Design with humans in mind: Engage doctors, nurses and other personnel early in the design process. Integrate their needs and preferences as part of the digital transformation activities to enhance their experience, which can result in a more efficient use of their workday while allowing them to focus on delivering care.
4. Strategize data acquisition and use: Assess current data sets and identify challenges and gaps. Explore ways to gather "good data" and aggregate currently siloed data sets. Integrate the new platforms or processes to collect data within existing workflows and leverage advanced technologies to cull actionable insights and drive better decision-making.

5. Make health care equitable: Accelerate digital transformation but view it through the lens of health equity. Ensure that any new experience or technology will be as inclusive as possible.

In conclusion, health organizations find themselves at different stages along the transformation journey to deliver more personalized care and enhance their patients' overall experiences. Responding to the COVID-19 pandemic accelerated their efforts. While technology and data are critical enablers, health organizations must tackle several obstacles on the path to a smart and genuinely patient-centric experience. These challenges include, but are not limited to, modernizing care models; ensuring quality, efficiency and better outcomes by using telehealth; and reducing inequities by better addressing social determinants of health.

The EY team would like to thank all the executives who participated in this dialogue.



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