



Urgent Care 2.0: Health Systems Taking the Retail Approach to the Next Level

Urgent message: Spurred by disruptive market entrants and burgeoning consumerism, health systems are increasingly adopting retail principles to better meet consumers' shifting expectations. Thus, urgent care stakeholders, either as standalone operators or partners with a hospital/health system, must further expand upon their retail offerings in order to fend off increased competition.

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Healthcare in the U.S. is undergoing a number of dramatic changes, one of which is what some insiders are calling the “Uberization of healthcare.” Also referred to as the “Uber effect,” market forces are driving healthcare to belatedly embrace the retail-centric, consumer-focused ethos that has long been the standard in other industries. And for good reason: en masse, today's healthcare patients are thinking and acting like bona fide consumers, and are actively shopping for providers who will treat them as such.

Consumers want fast, convenient, affordable, seamless, and high-quality services, and they want engagement via digital channels—much like Uber and other disrupters offer through their platforms.

Of course, urgent care laid the consumer-focused groundwork some 30 years ago: Imagined as a viable alternative to limited primary care access and expensive, overcrowded emergency departments, urgent care offered same-day appointments, short waits, convenient locations, affordable visits, and extended hours—in retrospect, the ideal vehicle for ushering in healthcare consumerism. Hence, consumers flocked to the model, and sparked a meteoric rise that's still going strong to this day.

Indeed, urgent care was the first retail health play. Today, though, disruptive new entrants are flooding the market with ambitious innovations that threaten to



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siphon off market share from established healthcare players, including urgent care. These entrants are often pure play disrupters who have created successful busi-

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nesses filling the gaps of traditional healthcare providers, and are collectively setting a new baseline for transparency, access, and service delivery. Thus, the onus is on existing health systems to innovate and compete, or watch their market share dwindle.

The Shift Toward Digital and Retail Healthcare

Global research and consulting firm McKinsey asserted in a recent report that in 2016, venture-capital firms invested upwards of \$7 billion globally in the digital health space, and are on pace to eclipse that figure this year. Other than the dot.com era of 20 years ago, no recent investment category has seen an increase of this magnitude. To illustrate, consider the following examples of what three disrupters and innovators, digital and otherwise, are doing in the healthcare space:

- San Francisco-based Cellscope is developing technology that allows consumers to capture high-quality medical images on their devices, then forward them to a clinician for review and diagnosis.
- A health system in Minnesota, attempting to create a new standard in patient experience, purposely designed a medical center with the architectural look and feel of an Apple store.
- A hospital in North Carolina, borrowing from online dating technology, implemented an algorithm-based online portal that matches patients with providers based on 14 personality traits and characteristics.

Clearly, the advent of widespread connectivity, cloud computing, and mobile devices has resulted in a growing class of empowered, digitally native consumers accustomed to booking flights, ordering meals, and checking account balances through digital channels, quite literally at their fingertips. This evolution can be mostly attributed to disruptive innovators, whose expansive range of services and offerings have shifted consumer expectations. And now those consumers—by voting with their wallets—are demanding similar levels of access, transparency, convenience, and experience from their healthcare providers.

Urgent Care 2.0: The New Baseline

Urgent care is currently a hot ticket, as the ownership stakes increasingly shift toward venture capital firms,

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insurers, and hospital systems looking to leverage the many advantages the model offers: reduced costs, value-based and accountable care, geographical footprint expansion, and a consumer-friendly health system access point. However, new entrants with nimble and easily scalable business models, including retail clinics and telehealth providers, are courting those very same patients. And by successfully disrupting existing business models with innovative solutions, disruptive entrants are staking a solid claim, and capturing market share in the process. Thus, hospitals chains,

payors, and independent urgent care operators can’t simply stand pat with the status quo, or give in to complacency. Rather, they must make a concerted effort to take their urgent care offerings to the next level, and offer a wholly improved level of patient experience.

In short, the industry must fully commit to transitioning to a phase that some experts have dubbed *Urgent Care 2.0*: Clinics that have a standardized look and feel, while offering a fully retail, digitally supported, consumer-friendly experience without sacrificing care quality or clinical excellence. To that end, we’ve compiled a number of consumer-focused initiatives, based on the collective research of healthcare firm Advisory Board Company along with other healthcare leaders, that urgent care can adopt to differentiate their brand, and compete on consumer experience.

Full-service digital platforms – Given consumer expectations, just about every business nowadays has one or more digital channels—be it a website, mobile app, or both—for communicating with and servicing customers. Yet, Advisory Board research found that as recently as 2014, only 10% of healthcare firms offered even basic online scheduling.

For any healthcare organization that’s serious about competing for patients’ share of wallet, full-service digital platforms must go from being the exception to the norm. Patients want to schedule appointments, check wait times, receive text message updates, email their providers, and refill prescriptions—all from their smartphone. Urgent care operators must make the commitment to invest in technology platforms that allow full-fledged digital engagement with consumers, as they’re now heavily weighing such criteria when choosing a provider. And the

communication doesn't necessarily have to be one-way: clinics can utilize these channels to push out offers, updates, discounts, and promotions.

Self-publishing of patient reviews –

Social networking has become a way of life for consumers; hence, they regularly consult third-party review sites for information about providers while in the deciding phase. Research has found, however, that online sources such as Yelp! and Google+ tend to feature reviews that disproportionately skew negative. In fact, patients are twice as likely to report a negative experience to a third-party site as a positive one. And other patients indeed base their decisions on positive or negative reviews.

This offers compelling proof that patient experience, and social proof, are the new differentiators. Hence, simply monitoring and responding on third-party review sites is no longer enough. In fact, it behooves urgent care to begin self-publishing patient reviews on their own online platforms. Several health systems have already done so, with encouraging results. Additionally, research data indicate that satisfied patients are more likely to post reviews to the provider's website rather than on a third-party source, which serves to balance out the negative reviews, and paints a more accurate picture of the service level consumers can expect.

Expansion of hours – Intermountain Healthcare of Salt Lake City, UT recently started a late-evening pilot program in its urgent care clinics in an effort to become more consumer-focused. Intermountain, responding to high levels of late-hour utilization of the ED, expanded their urgent care closing hours to as late as 1 AM.

Urgent care, already synonymous with widened access, can study the Intermountain pilot program and further expand its hours if there is a clear need within that community, and it's operationally feasible. Especially for urgent care centers affiliated with health systems, the potential financial drawbacks of extended hours can be offset by the long-term patient loyalty (and concomitant revenue) engendered from providing such expansive access.

Preregistration options – Advisory Board surveys show that 84% of healthcare patients prefer prearrival prereg-

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istration options for expediting the process, reducing waits, and alleviating frustration.

Preregistration options can also verify insurance in advance, reduce registration bottlenecks, and increase up-front collections. Urgent care can expand its preregistration options via three channels: website, mobile apps, and unstaffed kiosks. It's a sound investment for eliminating a major source of patient frustration, saving time, and improving clinic operational efficiency.

Hardwired service recovery –

As there are bound to be missteps in any service delivery, a fully fleshed-out service recovery model must be designed, then organizationally hardwired to reduce the number of aggrieved patients who would otherwise defect. Again, patient experience is a key differentiator here, such that service recovery can no longer be taken lightly: It must become an organizational imperative.

One way urgent care can improve its service recovery is by creating social media teams that monitor patient feedback, in real time and after the visit. El Camino Hospital in Silicon Valley employs social media teams for reputation management purposes, and uses them to respond to frustrated patients, demonstrating that they care and are actively monitoring user comments.

Another effective service recovery method is implementing a mobile service recovery app through in-clinic Wi-Fi. Northshore-LIJ Health System in New York uses such a system, so that when patients log in to the Wi-Fi network, a pop-up prompts the user to answer the question, “How satisfied are you with the service?” Any patient who responds “unsatisfied” triggers an alert within the system, and a staff member responds within a few minutes.

Wait-time transparency – Although an issue that can slip under some provider's radar, Advisory Board research concludes that leaving patients in the dark about wait times is a primary source of dissatisfaction.

Dekalb Medical Group in Decatur, GA, after consistently receiving subpar wait-time patient satisfaction scores, realized that they needed a different approach. They understood that communication of delays is important to their patient experience strategy, so to improve in that area, they implemented a two-pronged approach:

- First, each patient, whether in a lobby or exam room, receives an update if 10 minutes have passed and they haven't been seen.
- Second, physicians will approach the patient in-person, acknowledge the wait, and offer a direct apology. This method has resulted in a dramatic increase in patient satisfaction scores surrounding wait times for Dekalb patients. The lesson? Any urgent care operation that does not already have a wait-time transparency protocol in effect should implement one as soon as possible.

Provider video profiles – Although the aforementioned online dating example is probably not the optimal approach for an episodic, ambulatory model like urgent care, efforts can be made to familiarize patients with their clinicians via video.

Health systems, including MetroHealth in Cleveland, OH, are increasingly responding to consumer requests for provider video profiles, and are making short video clips available on their websites. The videos introduce the provider and allow them to explain their approach to care delivery, giving patients a glimpse into the provider's personal style. Some urgent care centers are already using social media platforms like Facebook for that very purpose, posting short video introductions of their staff and clinicians. This approach is very effective for branding, and giving patients a sense of familiarity and comfort that is often a key factor when deciding which center to patronize.

Conclusion

McKinsey noted that disrupters don't usually have a dramatic effect on a market for several years. However, when consumer behavior and the scale of disruption reaches a tipping point, the effects are widespread. Thus, existing healthcare incumbents like urgent care, and the health systems and payors invested in them, must strive to meet the new baseline of transparency, access, and convenience that pure play healthcare entrants and disrupters are setting.

For this to happen, urgent care systems, long a con-

“To remain competitive, urgent care must wholeheartedly invest resources in the patient experience, as it has in clinical excellence.”

sumer-focused healthcare delivery model, must take the next step into the so-called Urgent Care 2.0 era, and become even more retail in its offerings. Taking a cue from leading disrupters like Uber, Netflix, and AirBnB, urgent care can increase its leveraging of digital platforms toward offering a more comprehensive range of consumer-focused services, and start filling the remaining gaps. Full-service mobile apps, social media, video content, and

dedicated service recovery initiatives are just some of the vehicles that urgent care can employ to further roll out the red carpet for consumers and engage them where they are.

In sum, patient experience is becoming just as important as clinical excellence, and if urgent care wholeheartedly invests resources in that area, it will achieve the differentiation necessary to remain competitive. ■

Summary

- One part of the ongoing evolution of the healthcare marketplace especially relevant to urgent care is known as “Uberization” or the “Uber effect,” in which market forces are driving healthcare to embrace the retail-centric and consumer-focused ethos, similar to big industry disruptors such as Uber.
- Venture-capital firms invested more than \$7 billion in the global digital health space in 2016—and they're on pace to eclipse that in 2017. No recent investment category has seen an increase of this magnitude for decades.
- Widespread connectivity, cloud computing, and mobile devices has resulted in more empowered, digitally native consumers who now expect greater access, transparency, and convenience from healthcare providers.
- Patients are most likely to post negative reviews on third-party websites (eg, Yelp! or Google+). Conversely, they're more apt to post positive reviews on the provider's website (as opposed to on a third-party site).
- Full-service mobile apps, social media, video content, and dedicated service recovery initiatives are all vehicles urgent care operators can employ in their efforts to increase consumer engagement.