



Customer Transformation

Winning in the age of the Empowered Consumer

The vast proliferation of consumer innovations we've all seen in areas like online purchasing, social media, digital marketing, and personalized services are making their way into health care. As technology continues to advance, the health care marketplace is adapting and consumers are finding that they have power to control personal healthcare costs by navigating the system more wisely. As a result, health care organizations need to rethink their consumer relationships.

With the increase in consumer cost sharing through increased prevalence of high-deductible plans and high levels of coinsurance, consumers are becoming far less insulated from the true cost of care. As they increasingly pay for care with their own money, they will likely demand new transparency, tools, and levels of service that could result in a transition of the industry towards a more retail-based purchasing model.

Providers often find that their patients are more skeptical and more demanding, and may be increasingly unwilling to pay for what they view as exorbitant

costs. Health plans will likely find that they should redefine their value propositions to help steer members to high-value, cost efficient care outlets with new products, networks and plan designs. Many life sciences companies may begin to feel intense pricing pressure as employers, governments, health plans, PBMs, GPOs, wholesalers, and providers become increasingly focused on value and stingy on unit costs.

These aren't merely changes in perspective. They represent quantifiable risks to existing business models, but also present the opportunity to define a more long-lasting value proposition to emerging customer segments who demand personalized solutions to their health care needs. Those organizations who employ first-mover advantages to adopt durable strategies to capture the massive potential of these shifting, retail-oriented changes will likely enjoy profitable growth. Those who do not may struggle to survive.

Winning the Market Shift



From patients to consumers. From volume to value. The ground is shifting under the world's largest industry—and the players left standing will be the ones that embrace innovation with confidence right now.

Let Deloitte help you win the shift in critical areas like:



Value-based care



Provider-health plan integration



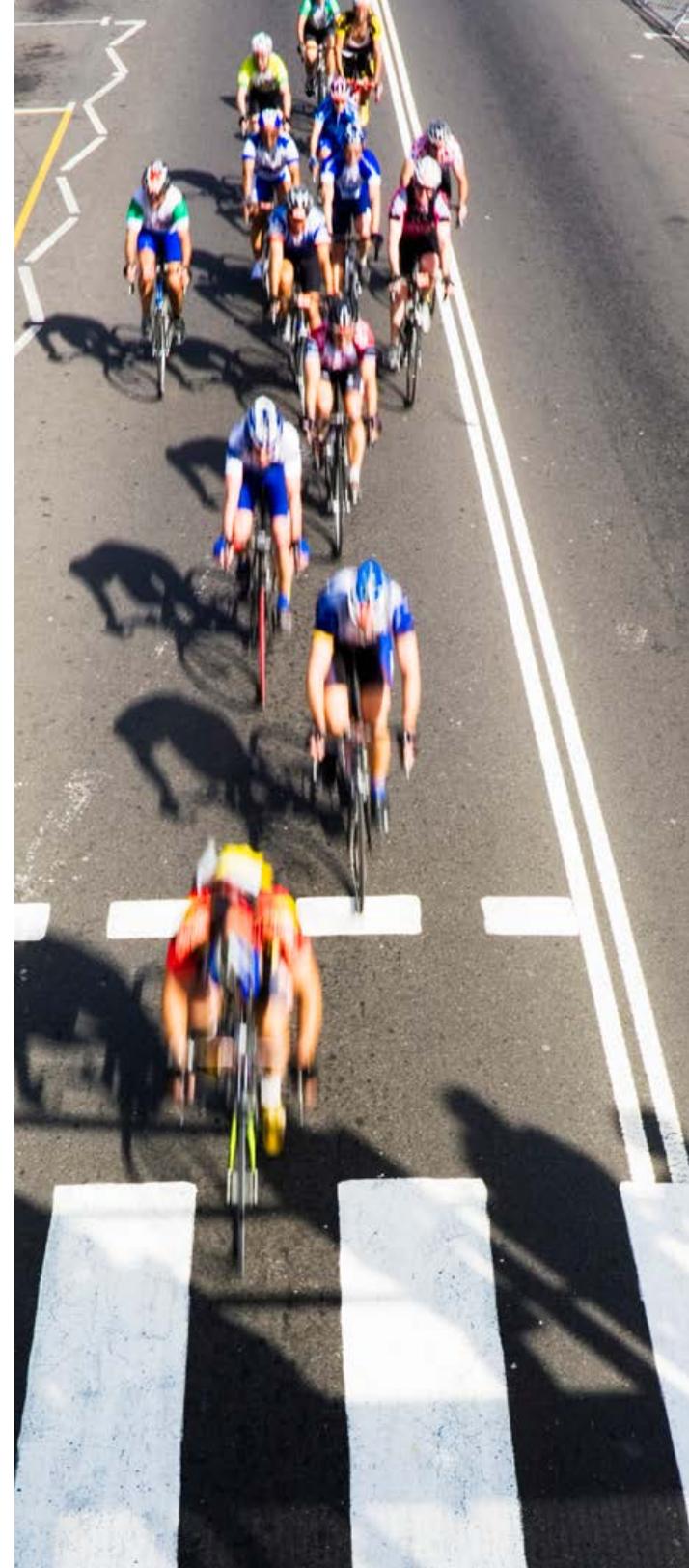
Customer transformation



Therapeutic area transformation



Margin Improvement



How we can help

Deloitte is working with clients across all sectors of the health care industry to adapt to this shift and find winning solutions. With the right strategy, customer understanding, financial modeling, and anticipatory preparation, health care organizations can adjust to the changing climate. Further, we've found that our clients can also invest in new retail-oriented capabilities especially in the areas of digital, analytics, talent, process enhancements, and new operational systems to address the new demands of the empowered individual.

We can help providers improve the patient end-to-end experience not only during care, but before and after, for increased engagement. Instead of competing with the growing retail health space, traditional providers can bring their strength into it—and secure their place in a new era of personal wellness. These solutions can also accelerate value-based care imperatives.

We can help health plans adapt their product designs, processes, and technologies to expand their consumer relationships beyond open enrollment and service transactions. To build year-round consumer engagement, we're assisting health plans to employ innovative customer engagement, segmentation, exchange, digital, analytics, and broad technology solutions that deepen loyalty and retention.

Join us.

If you believe in the creation of exponential value that could be generated by the health care community working together to transform health care, we should talk. Now is the time to move. Don't wait for your competitors to move first. *Carpe diem.*

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We can help life sciences companies move closer to—and demonstrate value to—providers, payors, and patients. By mapping and evaluating the patient care journey, we help organizations identify value-added touch points, patient services, and digital platforms that can differentiate companies and products in a crowded and intensely competitive marketplace. Our solutions can help address the imperative for life sciences companies to get closer to the full ecosystem influencing the choice of medicines and care.

Our service offerings include:

- Consumer strategy and transformation
- Consumer engagement
- Patient journey analysis
- Patient experience & engagement services
- M&A and alliance services
- Digital strategy and implementation
- CRM
- Consumer analytics
- Culture and change management

Potential bottom-line benefits

- Maintain and grow share in an increasingly competitive retail environment.
- Deepen engagement and loyalty to unlock patients' lifetime value.
- Understand the consumer perspectives that inform better inter-industry connections.
- Defend margins by looking beyond cost management.
- Make sounder investment decisions in digital health, analytics and other technologies.

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