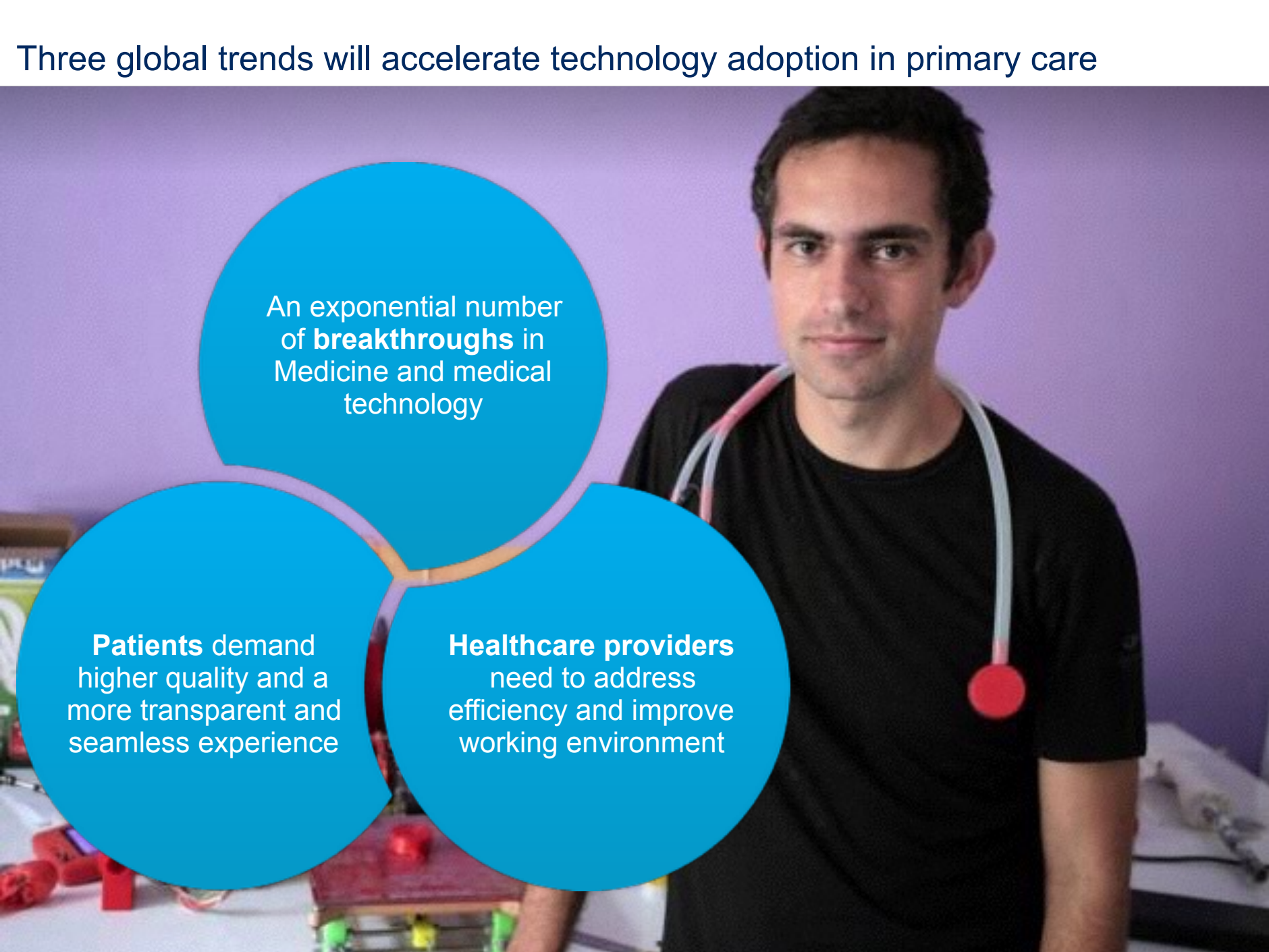


Three global trends will accelerate technology adoption in primary care

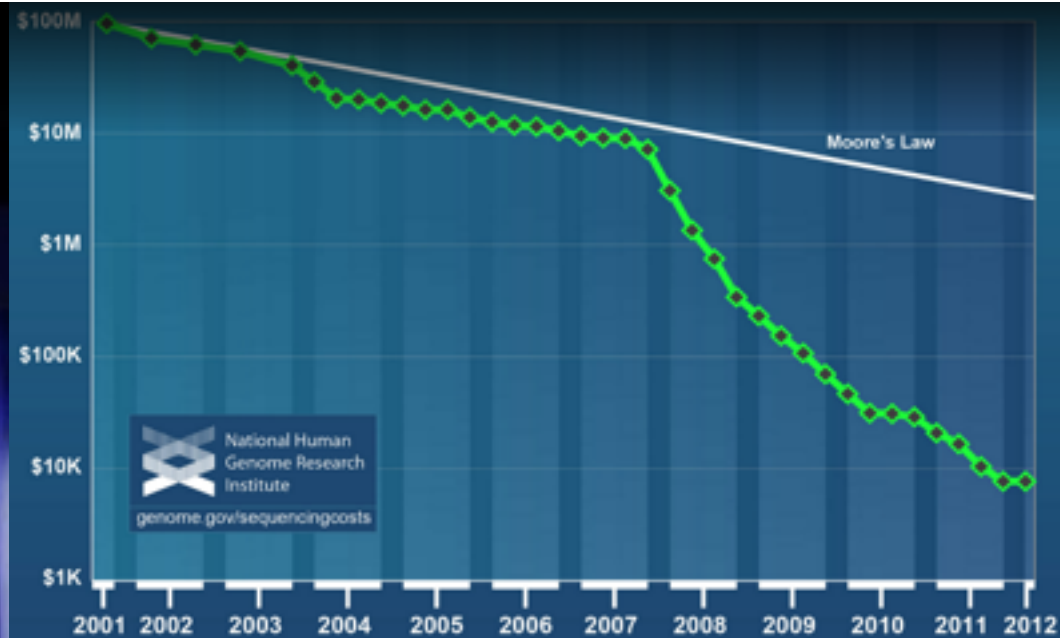
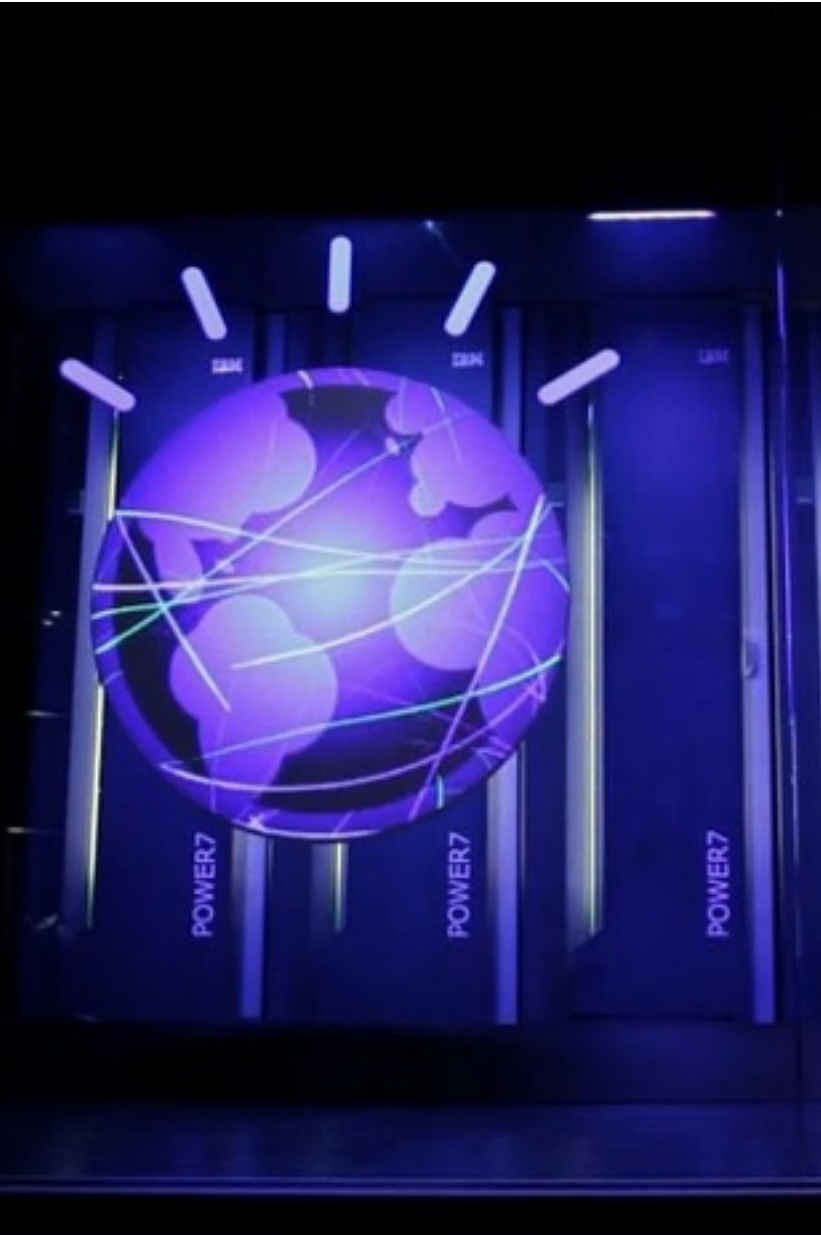
A man with dark hair and a black t-shirt, wearing a stethoscope, stands in front of a purple wall. To his left is a blue circular diagram with three overlapping circles. The top circle contains text about medical breakthroughs. The bottom-left circle contains text about patient demands. The bottom-right circle contains text about healthcare provider needs. The background shows a desk with various electronic components like a breadboard and wires.

An exponential number
of **breakthroughs** in
Medicine and medical
technology

Patients demand
higher quality and a
more transparent and
seamless experience

Healthcare providers
need to address
efficiency and improve
working environment

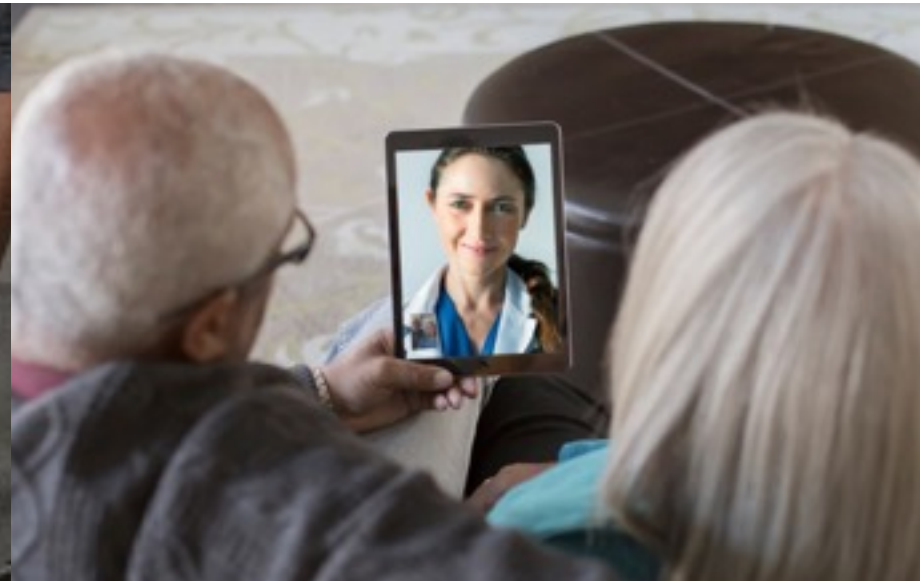
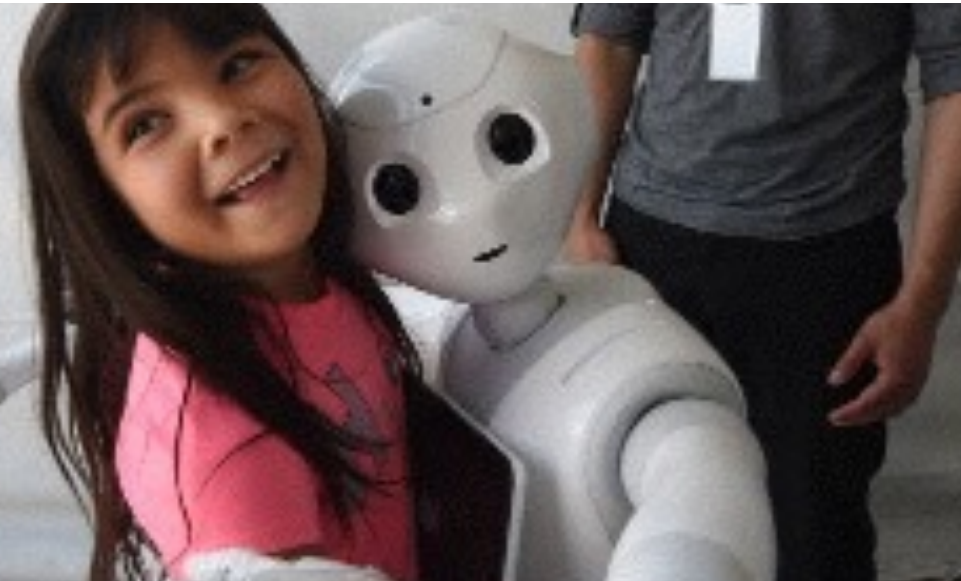
Inexpensive Genomic sequencing, new editing techniques and AI may eradicate previously incurable diseases such as MS and Cancer



Advances in medical technology can predict and prevent future illness and eliminate disability and enhance quality of life among chronically ill



Healthcare and care will be delivered through new channels and with the help of new tools



A call for action for developed economies to rapidly transform their healthcare systems

Accident and emergency

The NHS is in a mess. But reformers believe that new models of health care, many pioneered in other countries, can fix it

Sep 10th 2016 | BIRMINGHAM, CASTLE CARY AND SALFORD | [From the print edition](#)



Charlemagne

European politics



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Dec 16th 2013, 17:48 BY B.N.



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By VANESSA FUHRMANN

Updated Nov. 18, 2009 12:01 a.m. ET

BERLIN -- Germany's century-old universal health-care system, a model cited by reform advocates in the U.S. Congress, is buckling under the weight of a growing deficit that has forced the government to explore an overhaul.

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The country's ultragenorous health-care plan is going broke

By [Albertine Tonzil](#)

[@atonzil](#)

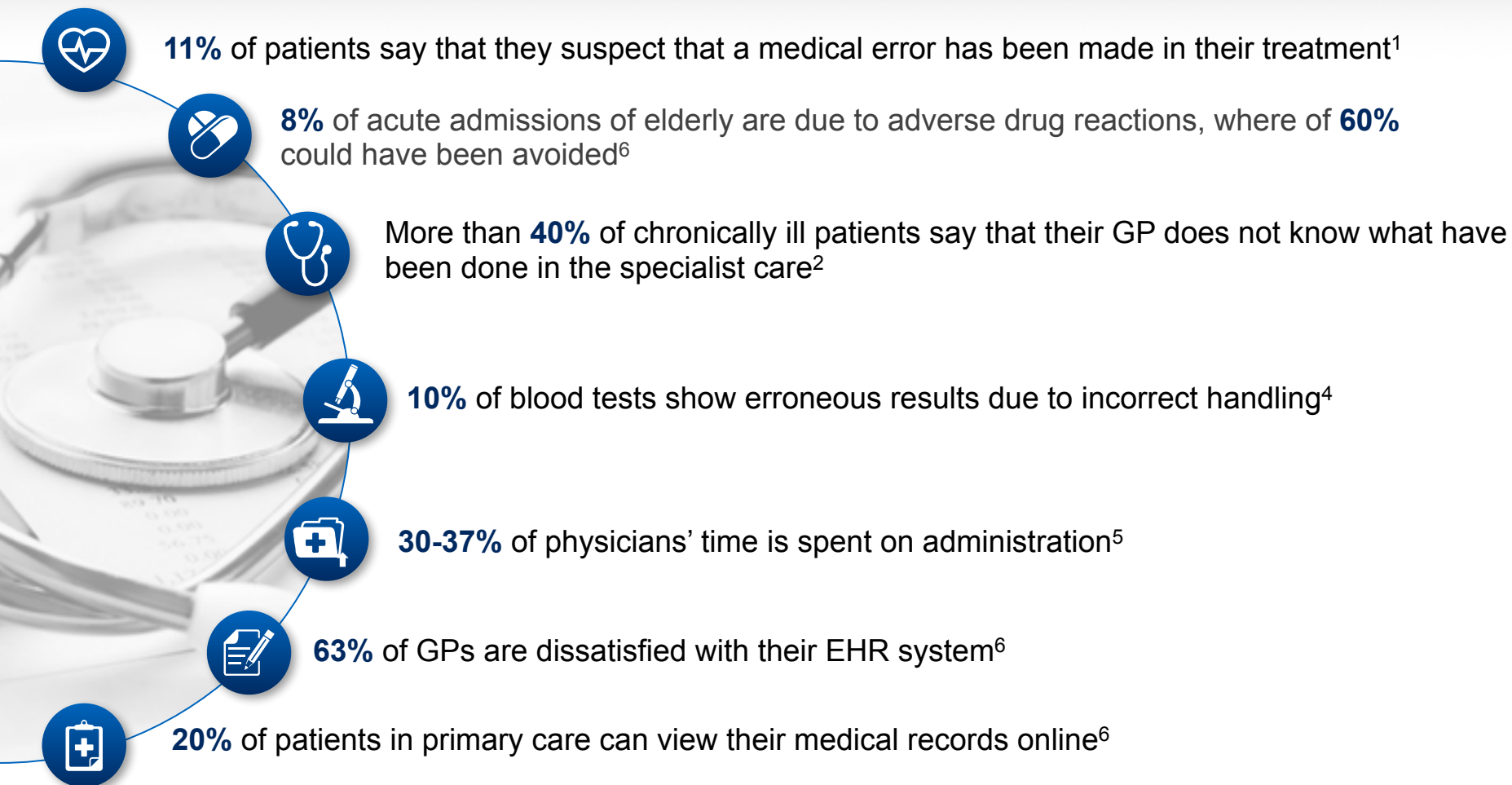
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January 4, 2013 -- 2:05 AM CET




There are lots of areas in primary care that needs fixing





Primary care will be at the core of a development where patients are increasingly demanding to be a partner in their own health provision



I shape my own care around outcomes that matter to me

Everyone involved in my care knows my goals and work together as one team

I can receive more care where I chose also in my home or community

I own my own health and care information which is shared with my permission

How technology can improve primary care performance

Improvement opportunities

Examples of technologies

1



Automating manual tasks to improve quality and consistency of care and support clinical staff to be more efficient



2



Enabling **patients and carers to play a bigger role**, which has been shown to improve quality and reduce costs



3



Allowing **real time management of assets, flow and staff** to improve operational performance



4



Reducing variation: Enabling/supporting/endorsing delivery of best practice care and reduction in errors



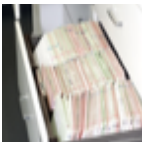
5



Enhancing **connectivity** so clinicians and patients **no longer need to be co-located**, enabling better self-care and adherence



6

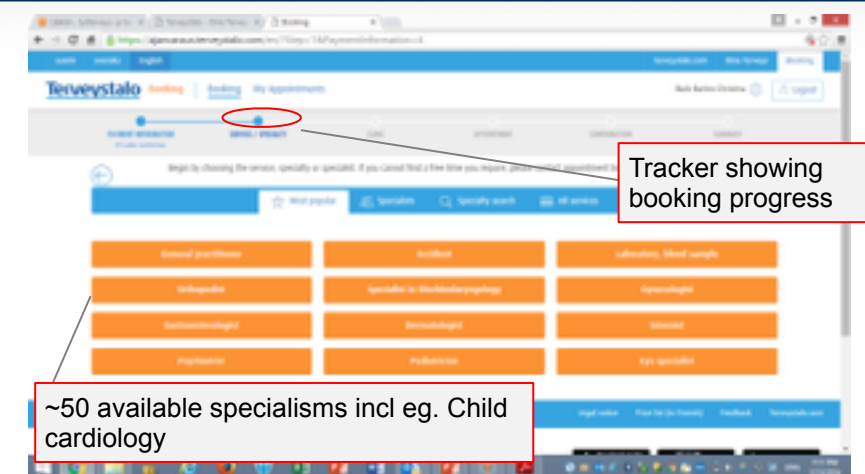


Sharing data to avoid duplication and improve decision making



Online booking and user friendly interfaces are standard practice in Finnish primary care

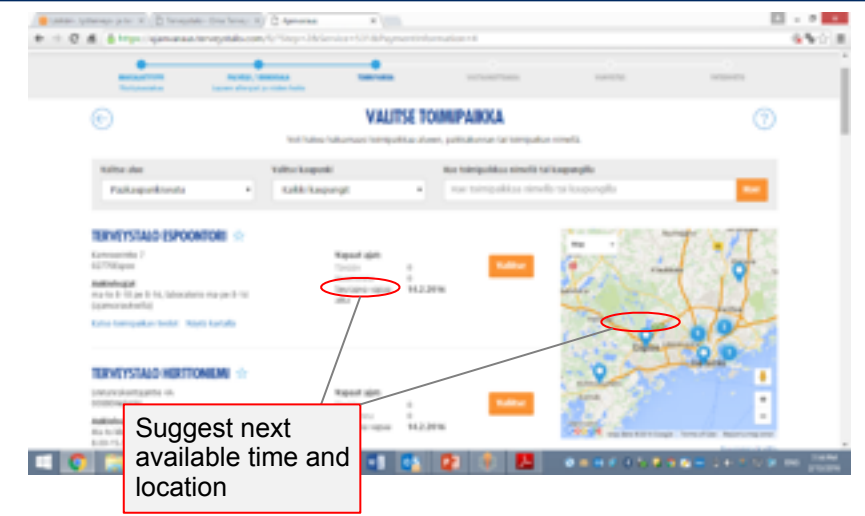
Start booking by choosing specialism...



Tracker showing booking progress

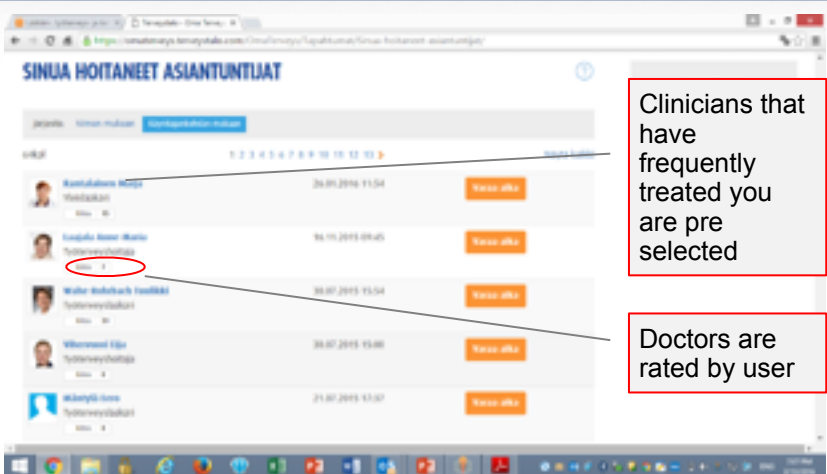
~50 available specialisms incl eg. Child cardiology

...or system suggest availability at close locations...



Suggest next available time and location

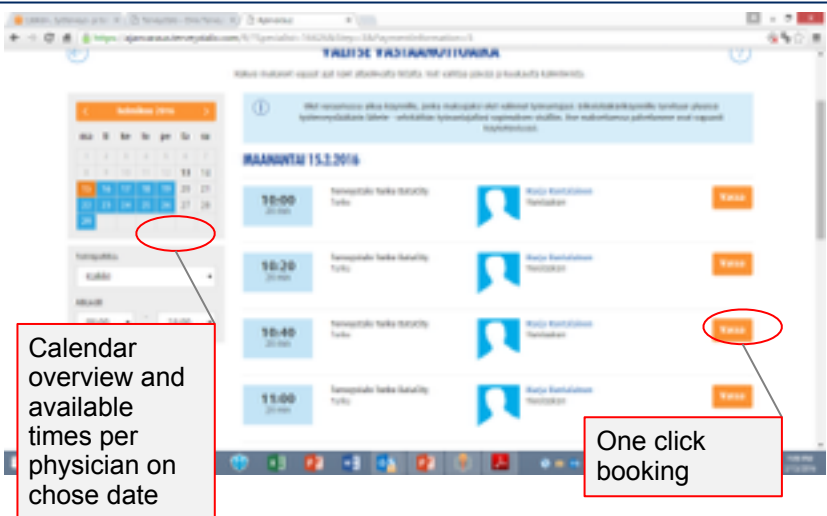
... or by selecting a familiar physician / nurse



Clinicians that have frequently treated you are pre selected

Doctors are rated by user

... and provides online calendar to finish booking

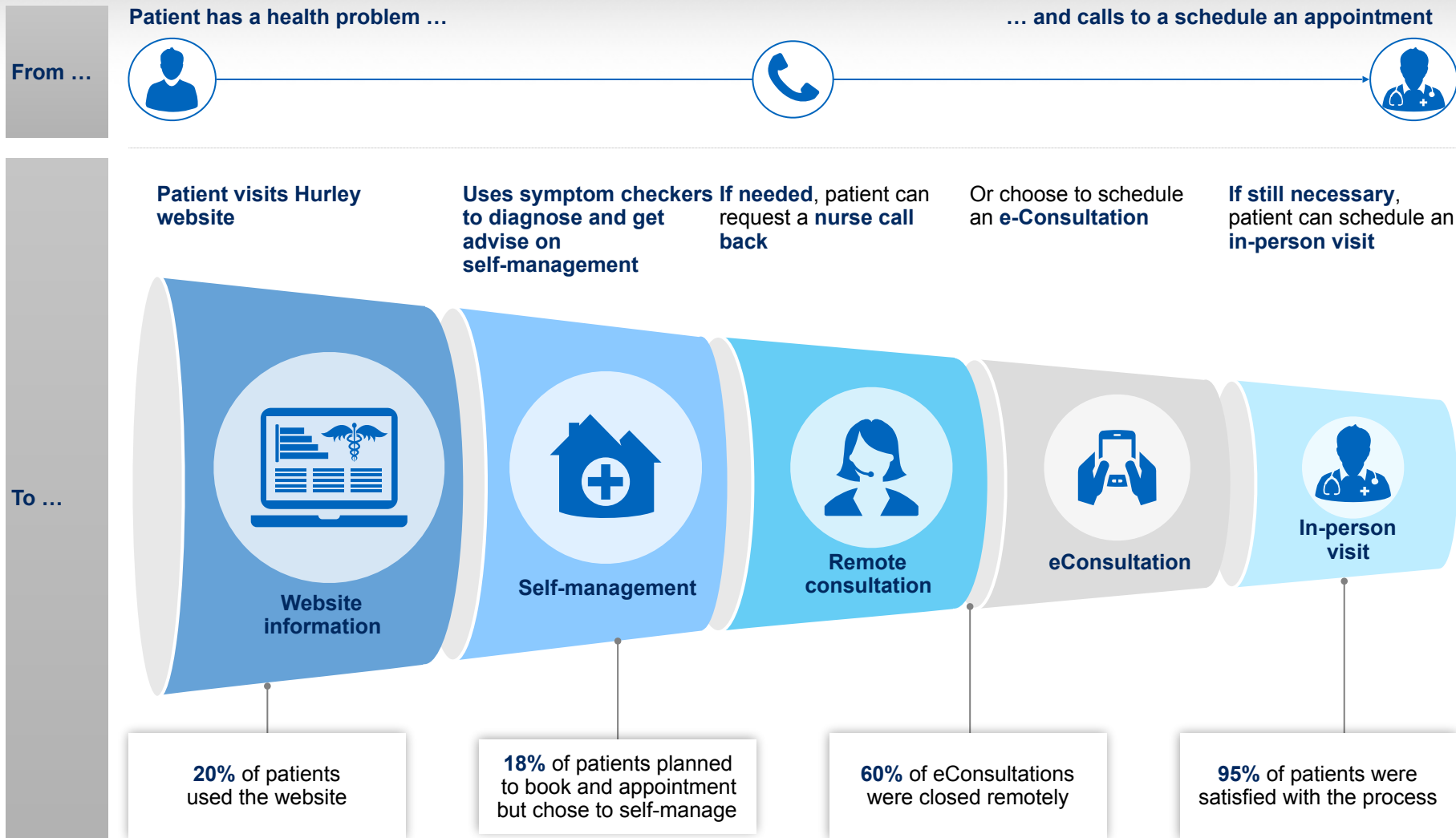


Calendar overview and available times per physician on chose date

One click booking

Hurley Clinic piloted self-help and e-triage and significantly increased efficiency while improving customer satisfaction

6 month pilot for 133,000 patients in 20 practices

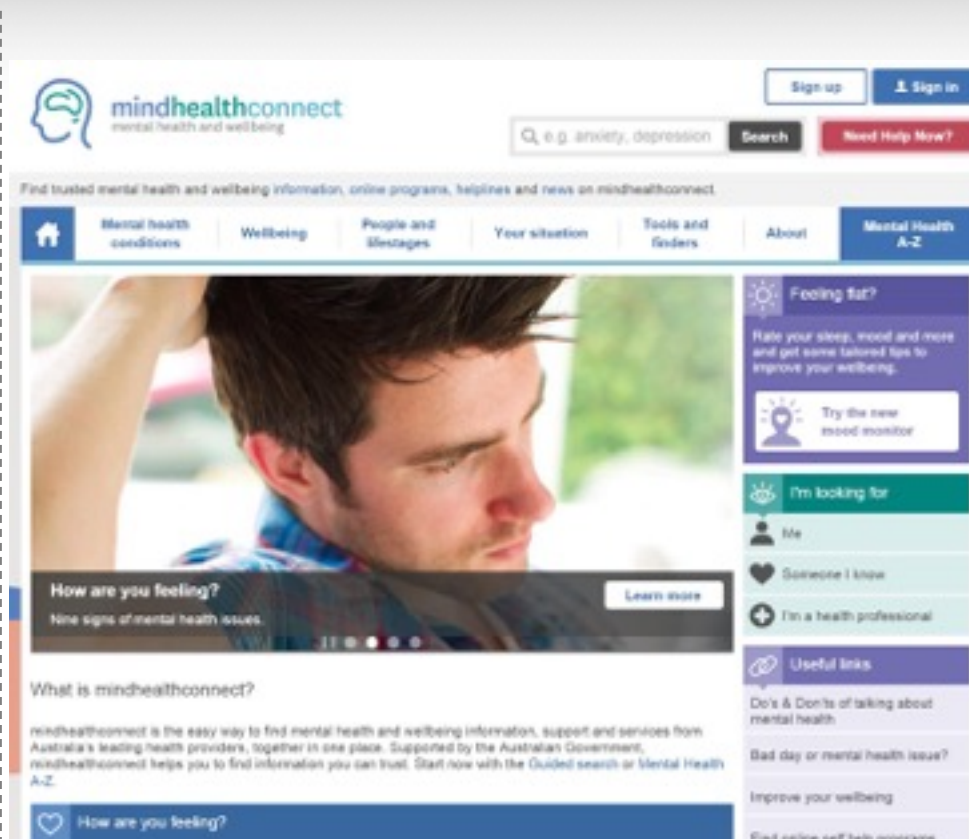


Mind Health Connect is a central strategy in Australia's initiative to improve mental health

Mindhealthconnect

- Mindhealthconnect.com is a portal that contains information and screening capabilities to help users find the right resources and links to other online resources
- A virtual clinic to offer step-by-step help based on the individual's needs. Starting with self-help, but offering personal support from psychiatrists and therapists if necessary
- Internet-based methods is an especially effective way of reaching patients with light symptoms of mental illness, especially stress, anxiety, and depression, or as a complement to the ordinary mental health care
 - The service is convenient, anonymous, and cost-effective, as the patient do not have to take time off work

The Internet Portal



Australia is in the forefront of preventing mental illness with the help of internet-based methods

Overview of the value creation potential from digitalization per care giver



Estimated gross savings potential 2025
Billion SEK

This is where the potential is found:

Primary care

Hospitals

Social care¹

CONNECTIVITY

Remote monitoring with connected sensors
eTriage and self-diagnostics
Remote consultations
eBooking
Web-based self-management
Monitoring of medication adherence
Digital primary prevention tools

Total connectivity

AUTOMATION

Connected electronic health records (EHR)
Patient flow optimization
Work force management
Tools for mobile workforce
Remote intensive care monitoring (eICU)

Total automation

ADVANCED ANALYTICS

Consistency of clinical performance
Clinical decision support (AI)

Total advanced analytics

Total

~45

~113

~25

Everyone has a role to play

Tech vendors

Policy makers

Payers

Providers

Consumers

- invest effort in making technology **easy to use** for clinicians and patients by creating simple, intuitive interfaces
 - clearly **articulate the value model** – that is, how will the technology generate savings or new revenue, or else improve quality?
 - address issues around **data exchange** and privacy
 - establish guidance **interoperability**, technology quality standards and the regulation of professional roles
-
- design **reimbursement** mechanisms need to support technology adoption rather than discourage it
 - **set service standards** and explicitly encourage data sharing in their contracting arrangement
 - map key **consumer journeys** and workflows and size and prioritise the impact of digital interventions
 - think not in terms of successful technology deployments but rather of the outcome they hope to achieve, **measuring success by the performance** change compared to business objectives
 - recognise the degree of **change** required and work proactively not just in advance of deployment but also post-deployment, a critical time to support the change and realise the value
 - elevate the role of IT, making sure that all members of executive teams take ownership of the digital transformation and that there are **sufficient skills** within the organisation to match clinical and technological requirements
-
- demand **more control** over shaping their own care and then embrace the opportunities they are given.

Thank you!

Oscar_Boldt-Christmas@McKinsey.com

