

The Impact of Retail Disruptors on the Healthcare Consumer Experience



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forum FOR HEALTHCARE STRATEGISTS



What You'll Learn Today

AGENDA

01

Clash of the Titans: The New Retail Health Landscape – James Gardner (10m)

Will retail entrants improve the consumer experience in healthcare?

- These new players won't have an impact
- Consumer experiences will get worse
- Consumer experiences will improve



forum FOR HEALTHCARE STRATEGISTS

Meet James Gardner



James Gardner

Sr. Marketing Strategist
StudioNorth



**MEDTECH
BOSTON**

COVERING THE NEXUS OF HEALTHCARE
AND INNOVATION IN BOSTON

A photograph of a Walmart Health storefront at dusk. The building has a modern design with a dark, slatted upper section and large glass windows. The "Walmart Health" logo is prominently displayed in white and yellow. The interior is brightly lit, and the sky shows a gradient of purple and orange from the setting sun.

Walmart Health

The Impact of Retail Disruptors on the Healthcare Consumer Experience

April 15, 2021

HELLO, I'M JAMES!



P&G, McKinsey w/ MBA

**15+ years agency-side
healthcare marketing &
digital transformation
experience**

**Marketing strategist by day /
retail health analyst by night**

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PRIMARY CARE THEN & NOW



RETAIL HEALTH: WHO'S WHO?



HUGE, COMPETITIVE, AND RELENTLESS



MEET WALMART HEALTH



Uninsured & underinsured

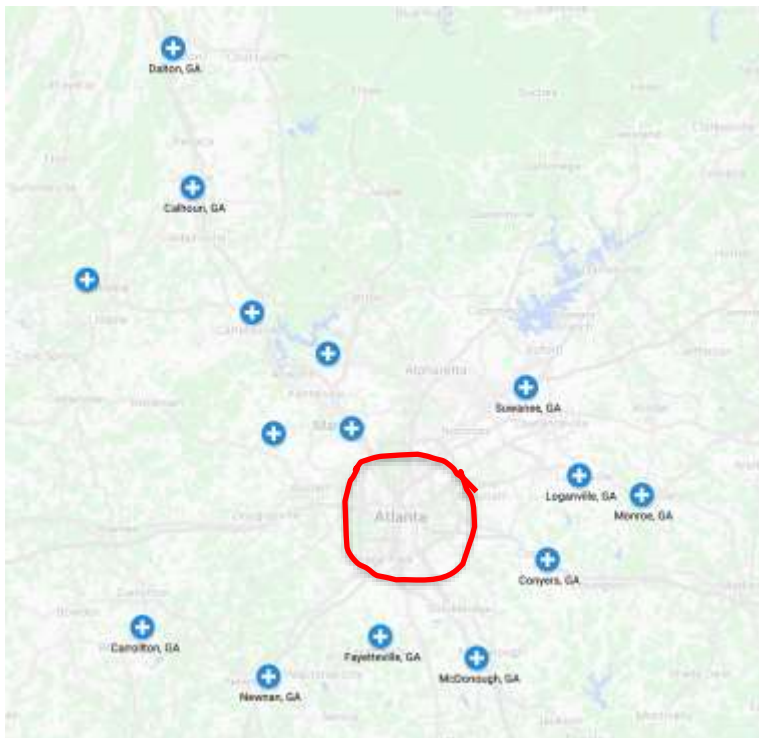
Walmart Health Services Summary Price List			Health	
Primary & Urgent Care			Dental	
Office visit	\$40	Patient exam (including X-Rays)	\$25	
Annual checkup	\$30	Teeth cleaning - adult	starting at \$25	
Annual checkup - youth	\$25	Teeth cleaning - youth	starting at \$15	
Add-ons			Porcelain crown	\$675*
Lipid test	\$10	Teeth whitening	\$225	
A1C test	\$10	Deep cleaning (per quad)	\$75	
Pregnancy test	\$10	Emergency treatment for pain	\$50	
Flu test	\$20	Filling	\$75-\$125	
Strep test	\$20	Clear aligner	\$1,800	
Mono test	\$20	Counseling		
Stitches & other	\$116*	New patient intake	\$0	
Flu immunization	\$40*	Individual counseling (45 min)	\$45	
Flu HD immunization	\$70	Family counseling	\$70	
Other immunization	Varies	Couples counseling	\$70	
External lab tests	Varies			
Optometry			Hearing	
		Routine vision exam	\$45	
		Contact lens fitting	\$55	
Other			Hearing	
		Hearing exam	Free	
		Tivity health & fitness classes	Varies	
		Health insurance enrollment	Free	
		Community resource consultations	Free	

*Charges with an asterisk are the average prices customers are expected to pay, but actual cost will be determined on a case by case basis. Any price without an asterisk is the actual price.

To schedule appointments, please visit WalmartHealth.com

As of 9/23/2019

PRIMARY CARE'S FUTURE? PERHAPS



+ Florida

+ Illinois

**= 30 or so
clinics by
early 2021**

***... but oddly
stalled at the
moment*** 🚧

AMAZON CARE: MEMORIES OF AWS

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Healthcare made easy

Skip the waiting room and start a virtual primary or urgent care visit from the comfort of your home.

[Watch the film](#)[Get started](#)

CVS HEALTH: IMPRESSIVE ASSETS



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pharmacy[®]

♥ **CVS**
minute clinic[™]

Health
HUB♥

♥ **aetna**[®]

♥ **CVS**
caremark[™]

WALGREENS: LAGGING, BUT STILL IN THE GAME



A photograph of a Walmart Health storefront at dusk. The building has a modern design with a dark, slatted upper section and large glass windows. The 'Walmart Health' logo is prominently displayed in white and yellow. The sky is a mix of deep blue and orange from the setting sun. A parking lot with white lines is visible in the foreground.

Walmart Health

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Can traditional health systems address the consumer experience (CX) gaps disruptors focus on?

- There aren't any important/meaningful CX gaps
- No, traditional health systems can't address culture & tech challenges causing CX gaps
- Yes, health systems can shift and pivot meaningfully to improve consumer experiences



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Meet Chris Hemphill



Chris Hemphill

VP, Applied AI & Growth
SymphonyRM



SymphonyRM

Data Science

Data Ethics



Transparency

Walmart 
Health & Wellness

My Personal Experience


Registration and Scheduling Experience

Health

Coronavirus: What v

If you recently teste
waiting for a result,

Expand +



Walmart Health Services

Prim

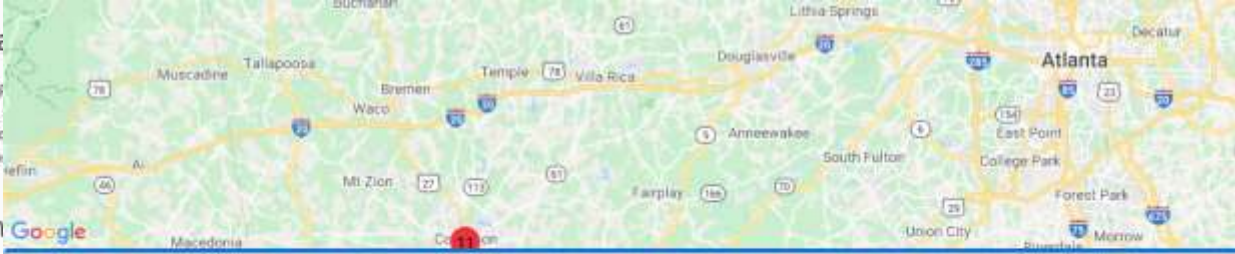
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hearing air



1. **WALMART HEALTH 05390** 16.3 mi

210 COBB PKWY S STE 100
MARIETTA, GA 30060
(678)695-9577

[Schedule an Appointment](#) [Health Center Price List](#)



Price Transparency Made EASY

Marietta pricing list

Services

Primary care services

	Price
Office visit	\$40
Annual checkup	\$30
Annual youth checkup	\$20

Dental services

	Price
New patient exam (exam & full mouth X-rays)	\$25
Adult cleaning (basic cleaning)	\$25
Youth cleaning (basic cleaning & fluoride treatment)	\$15

Optometry services

	Price
Routine vision exam	\$45
Routine vision exam & contact lens fitting	\$85

Counseling services

	Price
Individual counseling, existing patient (45 minutes)	\$45
Therapy intake, new patient (60 minutes)	\$60

No Drama with Scheduling

Health

Welcome! What type of appointment would you like to schedule?

Location: 210 COBB PKWY S STE 100, MARIETTA, GA

Medical Immunizations Dental

Optometry Hearing Counseling

Community Health

Health

Annual Checkup Adult (>18 yrs old)

\$30.00
Without insurance*

* This is the estimated price you would pay without insurance (cash). We can give you a cost estimate with insurance during registration after your appointment is confirmed. Additional charges may be incurred during the visit.

Provider (Optional)
[Choose a Provider](#)

March 28 - April 3

< Sun 28 Mon 29 Tue 30 Wed 31 Thu 1 Fri 2 Sat 3 >

10:45 AM 11:00 AM 11:15 AM 2:30 PM 2:45 PM

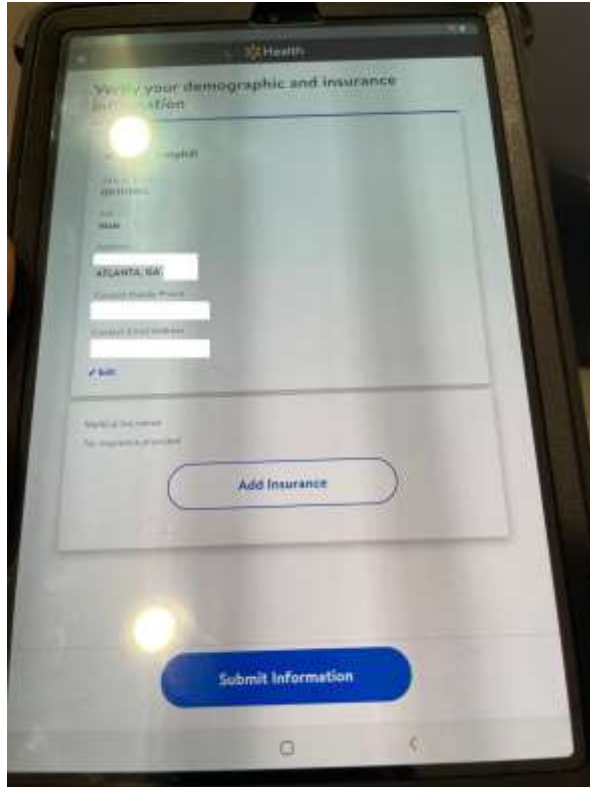
3:00 PM 3:15 PM 3:30 PM 3:45 PM 5:00 PM

Sunday Availability

Getting Settled – Walmart's CX Focus



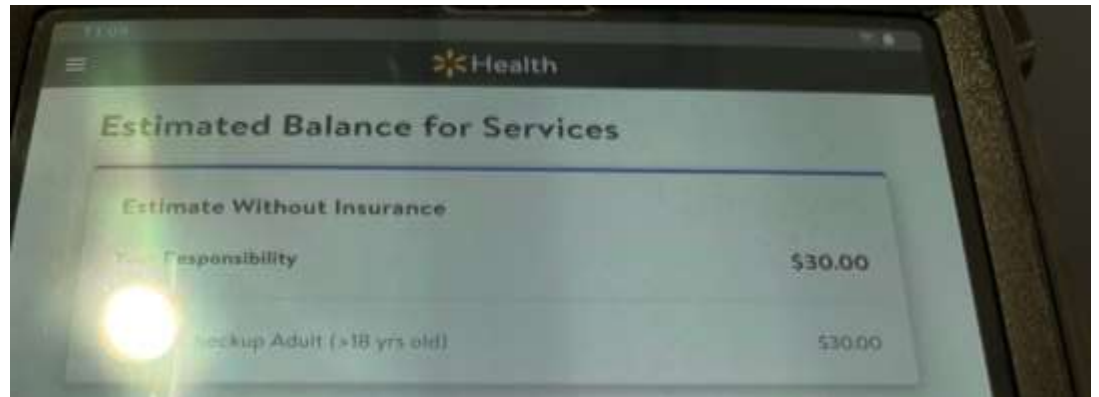
Breezy, Pre-populated, Paperless Registration



The tablet screen shows a registration form titled "Verify your demographic and insurance information". The form is pre-populated with the following information:

- First Name: [Redacted]
- Last Name: [Redacted]
- Age: 68
- Gender: Male
- Location: ATLANTA, GA
- Current Health Plan: [Redacted]
- Contact Email Address: [Redacted]

At the bottom, there is a blue button labeled "Submit Information".



The tablet screen shows an "Estimated Balance for Services" table. The table has two columns: "Your Responsibility" and "Amount".

Service	Your Responsibility	Amount
Estimate Without Insurance		
Checkup Adult (>18 yrs old)	\$30.00	\$30.00

The Visit: I'm Smiling Under the Mask



Price Transparency Continued (Labs)

8 8 10 20



Billing Made Instant & Easy

Date(s) of Service: 03/28/2021 – 03/28/2021	Generate PDF
	Expand Details
Michael Hemphill 03/28/2021 PREV VISIT NEW AGE 18-39	\$30.00
Michael Hemphill 03/28/2021 COMPREHEN METABOLIC PANEL	\$8.00
Michael Hemphill 03/28/2021 COMPLETE CBC W/AUTO DIFF WBC	\$8.00
Michael Hemphill 03/28/2021 GLYCOSYLATED HEMOGLOBIN TEST	\$10.00
Michael Hemphill 03/28/2021 LIPID PANEL	\$20.00

Physician knew all of these lab prices from memory

Final Verdict on Walmart Health Experience



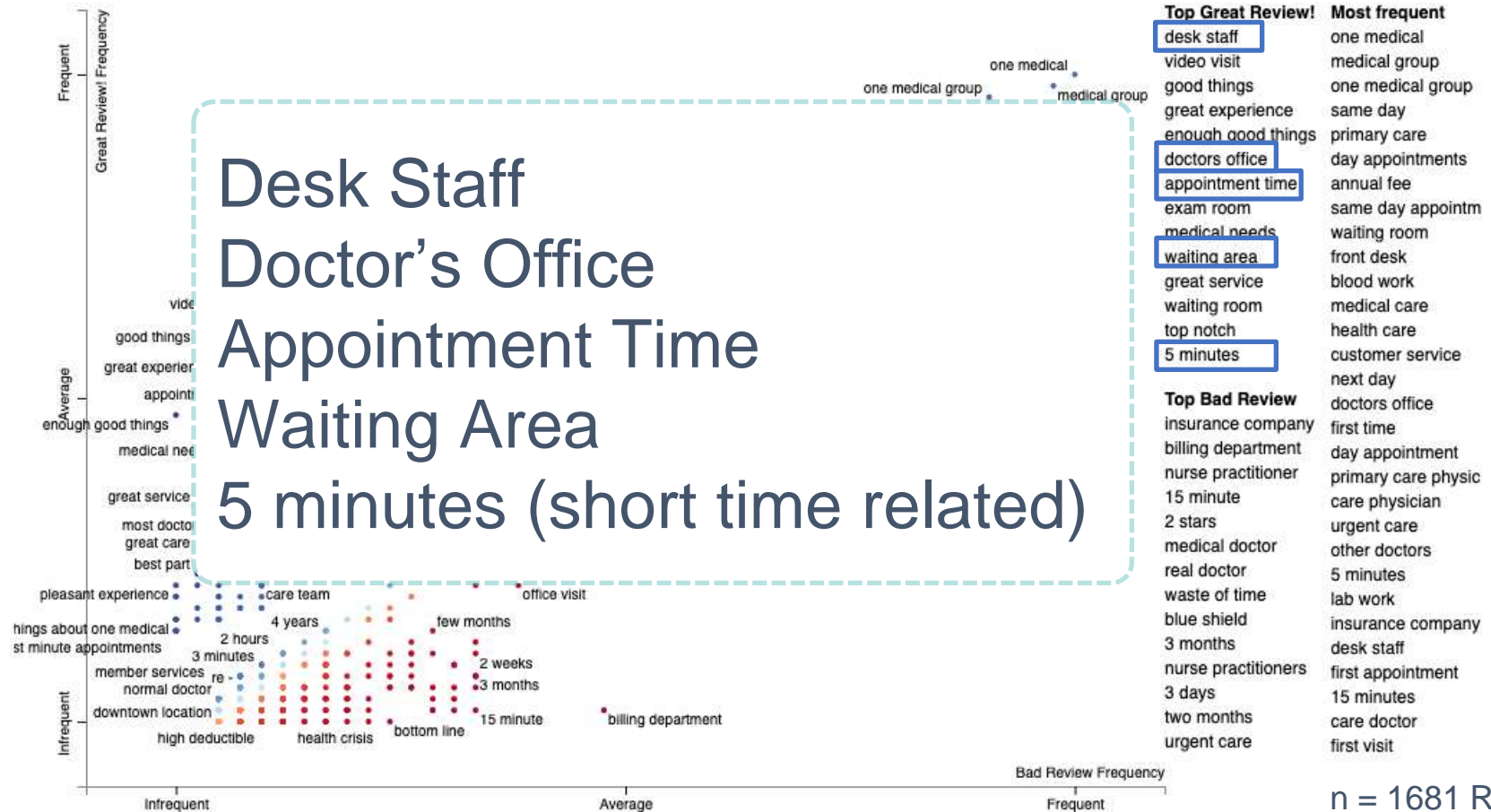
Why?

Convenient

Inexpensive

Experience
& Follow-up

Data Science Reveals How One Medical Delights its Consumers



What's the biggest barrier to consumer experience at your health system?

- Convenience of scheduling and registration
- The "Know Me" experience - lack of context & personalization
- Problems with staff and facility
- Problems with healthcare delivery



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Meet Shari Campbell



Shari Campbell

Director of Marketing: Retail Health
MultiCare Health System

MultiCare 

 **indigo**
URGENT CARE

 **Habitat**
for Humanity®





A Better Way to Get Better

Why can't I get the care I need, when I need it, quickly and conveniently?

Consumerism + Disruption —
Traditional Culture =



KPIs

Employee
Engagement

Door to Door

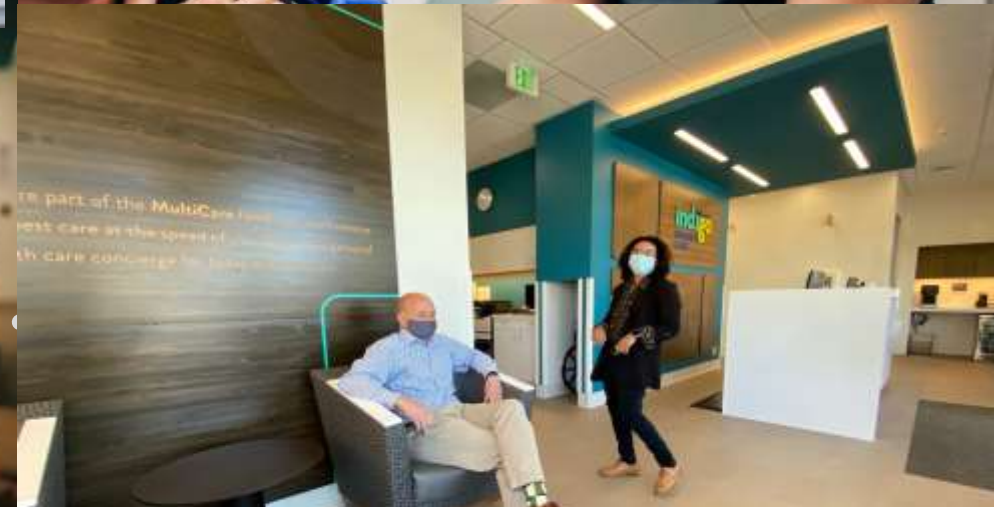
UC Visits Per Day

Net Promoter Score

CREATING “WOW” MOMENTS, ONE PATIENT AT A TIME

The Indigo Experience





ADAPT & EVOLVE:

Constant change, disruption is
in our DNA





2021

- Increase online appointments
- Decrease D2D
- Make registration paperless
- Listen and act on customer feedback (NPS), Employee engagement

What challenges would your organization need to overcome to improve consumer experiences?

- We're satisfied or are well on the way with the level of consumer experience we're offering
- Challenges are mainly cultural - hard to get buy-in on the needed change
- Challenges are primarily technical - no infrastructure to deliver on new experiences in foreseeable future



forum FOR HEALTHCARE STRATEGISTS



Panel: Impact of Retail Health Discussion



Shari Day-Campbell

Marketing Director, Retail Health
@MultiCare Health System



James Gardner

Managing Director
@Topline Partners



Chris Hemphill

VP, Applied AI & Growth
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Audrey Wyman

Manager, Customer Success
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