PERSPECTIVES AND FUTURES IN AMBULATORY CARE
Envisioning Your Future

The continuing shift to ambulatory settings for patient care is the result of the confluence of expanding capability, enabling technology, economics, and consumer demand. Tomorrow’s success means moving beyond the status quo and reaching for bold solutions – creating environments in accordance with how the clinicians of tomorrow are trained combined with healthcare’s new models of consumerism.

While new ambulatory facilities allow healthcare systems to remain at the forefront of medicine and create great opportunity, they also raise unparalleled challenges in the regulatory and reimbursement landscape. These challenges will force you to rethink the full breadth of facility design and clinical operations to ensure that your care center helps you manage your patient demographic, expands access to care, advances the globalization of medicine, and provides flexibility for the future changes in ambulatory delivery.

Our in-house team of clinicians, operations experts, economists, futurists, and predictive modeling analysts are in tune with what is on the horizon for the ambulatory healthcare industry – tying in future industry trends and global best practices while designing ambulatory solutions tailored to the local market. Our holistic approach to ambulatory care will profile areas of differentiation for your organization, the nature and source of your competitive advantage, and areas of opportunity to tackle.
There are four major categories of ambulatory care delivery influencers:

- Experience
- Intelligent Technology
- Sustainable Enterprise
- New Business Models

Within each of these categories, there are myriad thoughts, approaches, and amazing ideas which healthcare systems can tailor to their own unique brand of healthcare delivery. Our ambulatory care team understands the opportunities and challenges this poses for each organization.

For years, we have been working with a diverse group of clients – from academic medical centers to community hospitals – assisting with performance optimization, process redesign, and facility design. This comprehensive expertise allows us to develop customized solutions for your own brand of healthcare that positions your health system to thrive both now and in the future.
Experience

Smart providers recognize a major capital investment as a stimulant to design the future ideal patient experience.

With the rise of consumerism, patients are gaining access to more care choices as well as more information they can use to compare healthcare options and drive decision-making. The healthcare industry is recognizing that positive experiences for patients, staff and visitors can translate to increased loyalty, higher brand value, and stronger balance sheets.

DISRUPTOR

Concierge medicine, such as SPRY, is changing customer expectations about what a doctor’s office should be through customized spa-like experiences.
PERSONAL AND HUMAN-CENTERED

Patients of all generations seek to build relationships — not transactions — with their care providers, and are increasingly interested in partnerships with their provider when it comes to their health. A patient’s expectation is to be known, understood, and supported on their journey to well-being. Experiential design introduces human elements to personalize care experiences and build brand loyalty. As today’s consumer becomes more accustomed to convenient access to products and services, technology will play a large role in improving communication and convenience for both patient and provider. However, while there may be interactions and services that occur virtually, the person-to-person encounters will remain key to creating meaningful experiences.

RECRUIT AND RETAIN TOP TALENT

In a climate pervasive with workforce shortages and highly competitive talent recruitment, staff experiences are key to a health system’s success. It will be essential for care environments to be calibrated to meet the needs of new generations entering the workforce. Students graduating today and into the future are learning in team-based and collaborative care models, with advanced technology and more flexible work/life integration scenarios. For clinicians and staff who spend countless hours working in these institutions — typically under stressful conditions — a supportive environment tuned to their needs can have a significant impact on staff retention. Staff satisfaction can influence patient experience — as they saying goes, “happy staff = happy patients.”
M Health’s use of RTLS technology and redesigned processes, coupled with an efficient environment, has allowed them to reduce the cost of care 22% in their new Clinics and Surgery Center.
Intelligent Technology

Technological innovation is changing the way healthcare is delivered and conceived.

Medical capabilities and technology will continue to enable more care to take place in lower acuity settings. Specifically in ambulatory care, healthcare is undergoing a dramatic transformation at the center of multiple intersecting forces. Consumer-oriented technology and the demand for cost-effective services are forcing health systems to rethink their delivery models.

DISRUPTOR

Hello, Alexa! You can now ask Alexa to connect you to Dr. A.I. (Artificial Intelligence). Healthtap’s Dr. A.I. offers personalized, doctor-recommended insights and treatments to guide patients to care tailored to their specific patient profile. Dr. A.I. is powered by artificial intelligence and easily operated by Alexa’s voice-activated interface.
OUTPATIENT PROCEDURE GROWTH

Reimbursement pressures and competition are forcing institutions to look for lower cost ways to provide care in a highly collaborative and efficient outpatient environment. Medical advancements have caused an upswing in ambulatory procedures that once could only take place in inpatient settings — causing outpatient service growth at an unprecedented magnitude. As the outlook remains positive and the need for care in ambulatory settings continues to intensify, consumers are expecting better ways to access care, and more control over their experience — with health systems seeking new ways to deliver these experiences while improving quality and outcomes.

EMERGENCE OF VIRTUAL HEALTH

Technological advancements that allow healthcare to be delivered virtually — including e-visits, remote monitoring, and telehealth — are quickly gaining popularity. While brick and mortar facilities are not going away, they will need to be flexible and designed to respond to changing needs to be as intelligent and efficient as the patients, staff and visitors they serve. With seniors and soon baby boomers desiring to age in place, remote appointments and at-home visits by providers will become more prevalent. Patients will increasingly expect their care to be portable, customizable, transparent and responsive.

Providers and patients will connect to each other remotely with wearables monitoring vitals and aggregating health data processed by Artificial Intelligence.
Through extensive development of patient personas and interface with patient advisory groups, ProHealth incorporated the appropriate technologies and created an interior patient experience tailored specifically to a unique market in suburban Milwaukee. ProHealth was able to grow market share among a very diverse white- and blue-collar patient population.
By all experts’ opinion, today’s healthcare model is not sustainable – it is too expensive and not nimble.

Tomorrow’s emerging ambulatory model needs to answer the daring question – “How do we increase quality at a lower cost?” The future of ambulatory physical environments will be forced to embrace flexibility, efficiency, and be cost-effective in order provide a level of sustainability to be successful in the long term. New facilities need to provide the utmost value — designed to streamline care delivery and engage patients, while eliminating inefficiencies and waste to reduce capital costs.

**DISRUPTOR**

Kaiser Permanente is embracing the shift away from the hospital and the doctor’s office as 52% of their physician encounters are now virtual.
INFINITE FLEXIBILITY

Now, more than ever, physical environments must allow for future – and potentially unknown – changes in care delivery models, patient volumes, and new technology. Health systems can no longer afford to continuously renovate and retrofit their environments to respond to changing needs. Facilities need to have plug and play capabilities in order to grow, shrink, and adapt as needed. Speed to market advantages can also be achieved by standardized, predictable and repeatable spaces.

RADICAL REASSIGNMENT

Population and demographic changes are creating demand for a different model of patient care – now and into the future. No longer can buildings be custom designed for the current occupant. Exam rooms need to be standardized, configurations templated, and spaces assigned as needed. Modular design is readily adaptable to new technologies and treatment protocols that have yet to be discovered. Medicine is quickly turning into a team sport, and facilities need to adapt to accommodate a collaborative and interprofessional approach to care. Facilities created to allow teams to reassign as needed will be the workhorses of tomorrow.

Prefabrication through Integrated Modular Design (IMD) can reduce delivery time by as much as 28% over traditional design and construction.
At Allegheny Health Network’s Wexford Pavilion, whenever possible, spaces were standardized, allowing schedule acceleration that yielded $4M in net revenue; the first patient was seen 16 weeks ahead of the original schedule.
Ambulatory providers are under enormous pressure to reduce the overall cost of care, streamline the continuity of care, improve outcomes, offer service and resources to support a healthy lifestyle and offer the community quality, sophistication and convenience in one location. It is imperative to optimize the relationship between capital investments and the revenue stream in designing an ambulatory care environment for a rapidly changing future.

**DISRUPTOR**

The Forward Clinic, founded by former employees of Google, Uber and Facebook, is taking outpatient care to the next level. Positioning itself as the “Apple Store of doctors’ offices,” Forward plans to take its reinvented doctors’ office nationwide.
CONSORTIUMS AND THE DATA DRIVEN PATIENT

With individual patients shouldering more and more of the cost of their ambulatory care through rising healthcare insurance deductibles, patient expectations around the care experience have never been higher. These changing expectations have opened the door to an unparalleled number of “non-traditional” investments and partnerships to redefine ambulatory care delivery models.

CVS’s acquisition of Aetna and the pending joint venture of Berkshire Hathaway, Amazon, and JPMorgan Chase point to waves of disruptors that are aimed at producing “simplified, high-quality and transparent healthcare at a reasonable price.” These organizations are cash rich and have significant experience in defining the consumer process experience through data.

From unlikely alliances to independent healthcare companies, these partnerships are upending traditional healthcare delivery in an effort to make healthcare more affordable and convenient.

SHIFTING PARADIGMS

Providers are now tasked with providing the right care, by the right provider, at the right moment, and in the right place. Expertise, treatments and technology combine to deliver faster, more cost-effective and comprehensive care with better outcomes.

Standard office visits are now being replaced by video and e-visits – saving patients time and money. While this is resulting in fewer office visits, this increasing interaction with the doctor and care team is leading to better outcomes.

CARE TEAM COLLABORATION

The transition to interprofessional, team-based coordinated care models call for new lines of communication, collaboration and cooperation through shared spaces. Open and flexible workplaces place a high priority on caregiver collaboration, which enhances quality and increases efficiency. Maximizing the use of technology supports a mobile workforce and collaborative environments.

CONCIERGE MEDICINE

As providers seek to deliver medical care that is patient-centered without being constrained by bureaucratic or insurance related obstacles, and patients desire a more tailored experience, health systems are quickly moving to the concierge platform. As a result, experts are now recognizing growth in the concierge platform between 3% and 6% each year. The Forward Clinic in San Francisco is taking care to the next level by providing patients with access to an on-call care team utilizing the latest AI to inform a preventative approach to wellness – uniquely tailored to each patient.

DESTINATION HEALTHCARE

Ambulatory strategy is no longer just new physician offices, but community centers that provide a carefully curated set of diverse services to meet increasing needs. Consumers are demanding changes in access to care, convenience and wellness products. By analyzing the requirements and wishes of the community to design a solution that effectively meets their needs, health systems are able to create a healthcare destination and reinforce their commitment to improving community health.
Determining the Building Blocks for an Ambulatory Care Site

The continuing shift to ambulatory settings for patient care is the result of the confluence of expanding capability, enabling technology, economics, consumer demand and opportunity.

**MODEL 0**

**TAKE TWO ASPIRIN — WE’LL TEXT YOU WITHIN 15 MINUTES**

House Call Apps • Telemedicine • Concierge Clinic • Mobile (in existing)

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**MODEL 1**

**BASIC — PRIMARY CARE**

General Medicine, GIM, OB, immunizations • Limited X-ray (potentially mammography & US) • Lab draw • Pharmacy Service • General health promotion

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**MODEL 2**

**INTERMEDIATE — SPECIALTY CARE**

Medical/Surgical Specialties • Limited Integrated Services • Urgent Care

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**MODEL 3**

**COMPREHENSIVE — ROBUST ANCILLARY SUPPORT**

Diagnostic Imaging • Pharmacy • Lab • PT/OT/Speech • Procedure • Infusion

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**MODEL 4**

**INTEGRATED — MULTI-DISCIPLINE**

Sports Medicine • Behavioral Health • Women’s Health • Diabetes • Oncology • Heart Health

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**MODEL 5**

**ADVANCED — HEALTH/WELLNESS**

Vision care • Dental care • Health Education • Wellness • Social Determinates of Health • Free Standing ED • Micro Hospital
Designing Your Future

We understand how opportunities for new solutions in ambulatory care arise through a combination of strategic business planning, sophisticated operational planning, an increased awareness of the importance of patient experience, creative facility approaches, and inspiration from outside industries. Protecting and growing market share while improving performance is the new ambulatory care imperative and rooted in understanding a health system’s patients and market.

Our approach recognizes the uniqueness of each health system – targeting our efforts to identify ambulatory marketing opportunities and tailor solutions that correlate with each client’s definition of value. Employing both data and market-driven strategies, we use computational design to test scenarios and track results quickly and effectively. Leveraging our global perspective and expertise, we are able to identify industry trends, project directions, and identify opportunities — ultimately helping you define your future in ambulatory care.

With all of today’s uncertainty, determining the future of tomorrow’s healthcare facilities no longer begins with space and beds; but with an understanding of how to achieve optimal performance focused on one goal – value. Value for your patients, providers, payors and your health system – now and well into the future.