

# Strengthening the Patient Experience

March 13, 2010

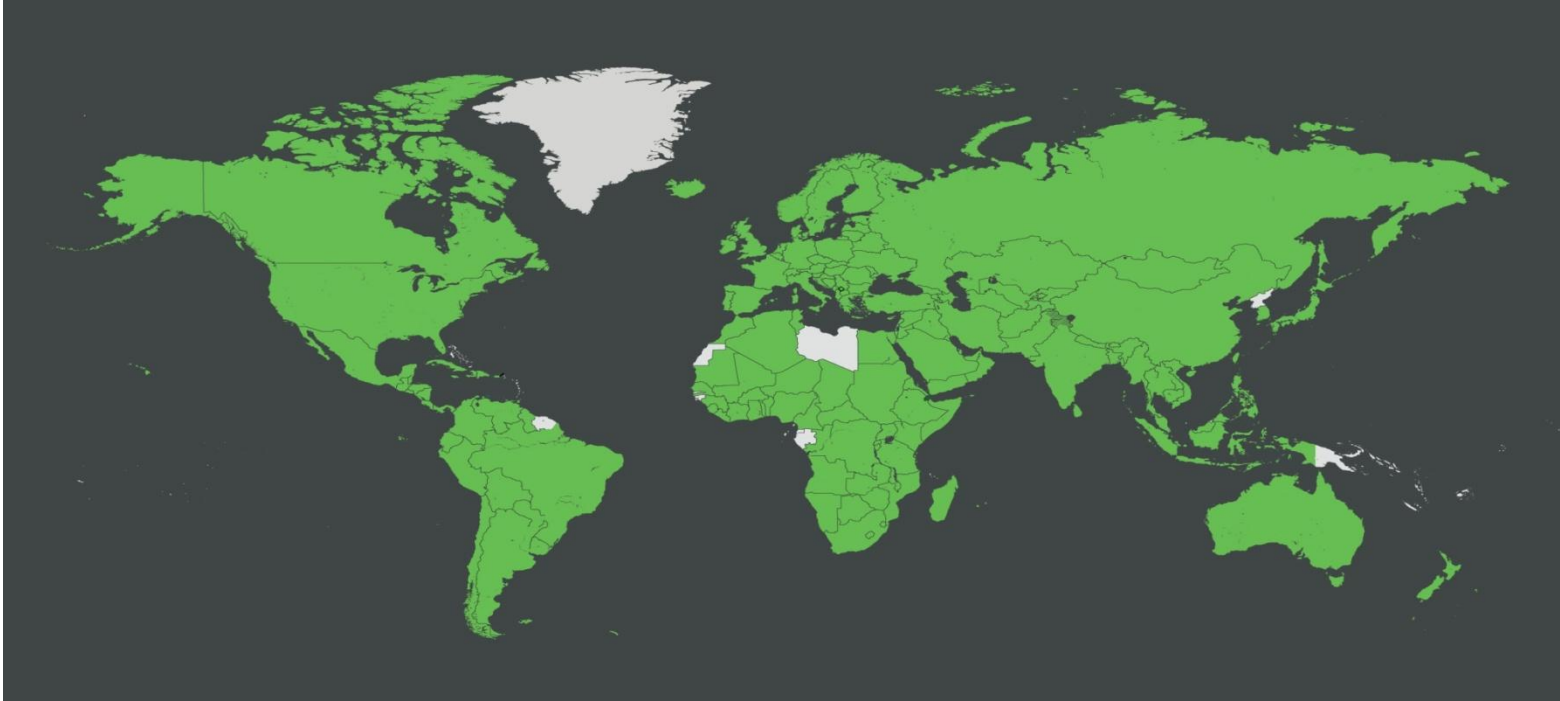
2<sup>nd</sup> Annual Chicago Medical Tourism Conference

Maggie Ozan, Global Practice Leader, Healthcare



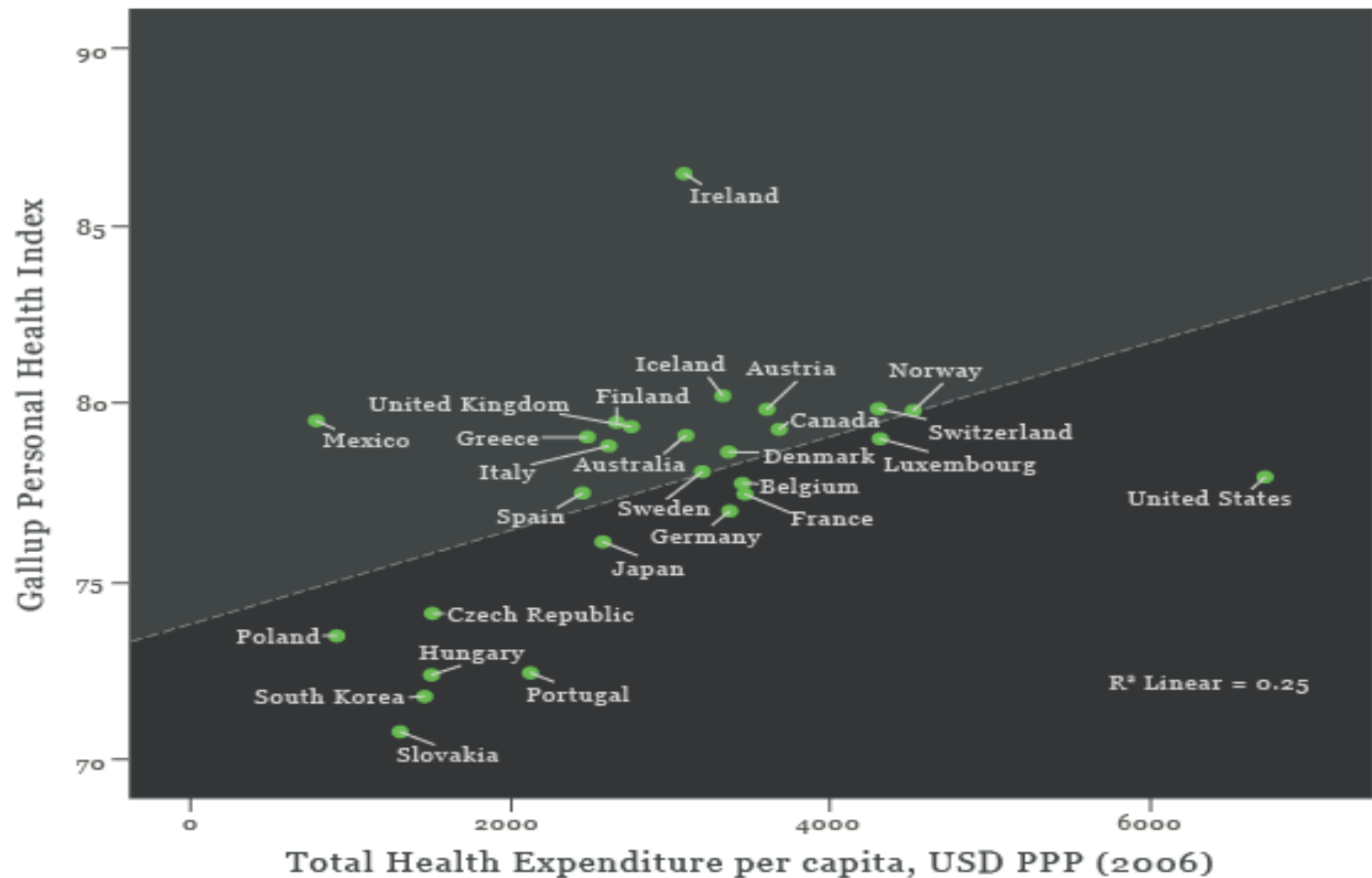
# Gallup: A Global Research-Based Consultancy

Measuring Social, Economic, Political and Health Status covering 95% of the world's population.



**And we ask Great Questions**

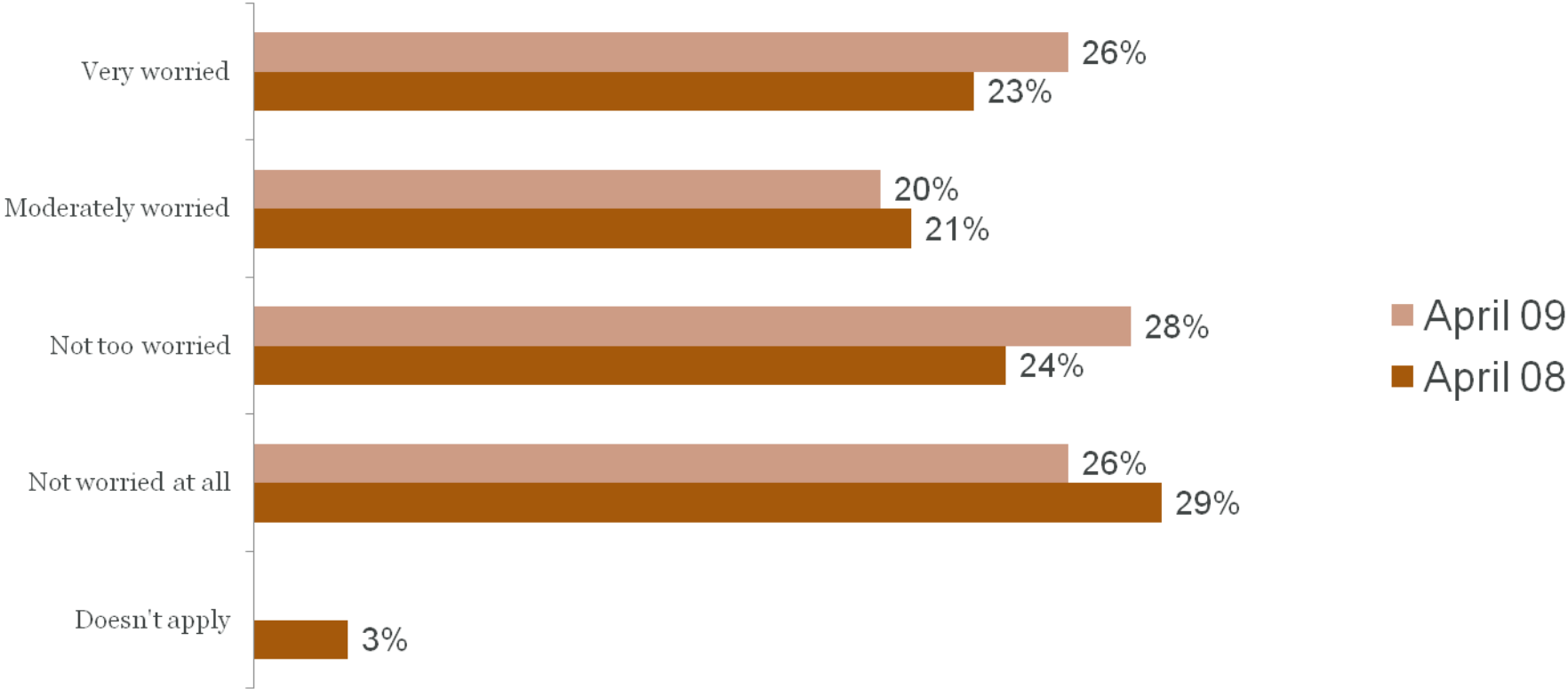
# More spending does not necessarily lead toward better health for citizenry.



Does not include New Zealand, Netherlands, or Turkey because health expenditure data were not available.

# Many Americans worried about healthcare costs.

Worry about paying for normal illness

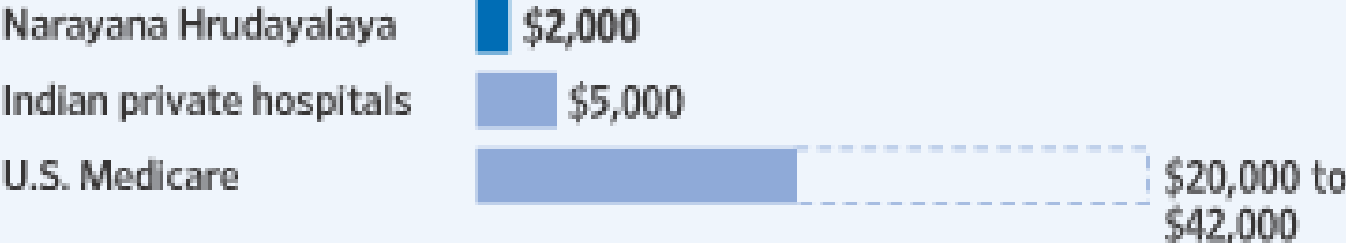


# Global cost competition will have its limits

## Operation Cut Costs

India's Narayana Hrudayalaya Hospital uses high volumes to lower health-care costs.

### Average price charged for coronary artery bypass graft surgery\*



Source: "The Henry Ford of Heart Surgery," Wall Street Journal, November 25, 2009. p. A16.  
<http://online.wsj.com/article/SB125875892887958111.html>

# Questions.... beyond price

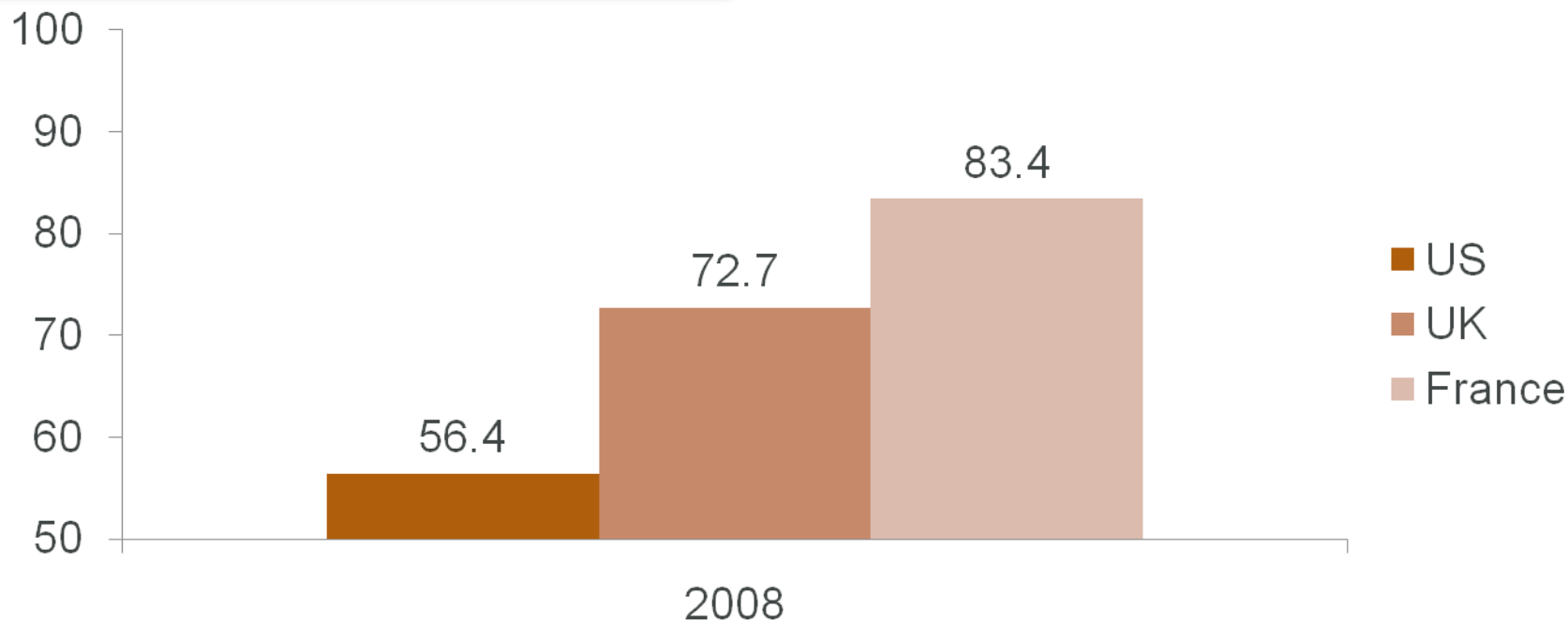
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- Are your citizens advocates for your nation's healthcare?
- What is your domestic and international consumer demand?
- Do you understand the behavior of your workplace and its influence on your patients?
- Do you have a strategy for creating a differentiated patient experience for both domestic and international patients?

# American confidence .....comparatively low

**Question Wording:** In your country, do you have confidence in each of the following, or not? How about Health care or medical systems?

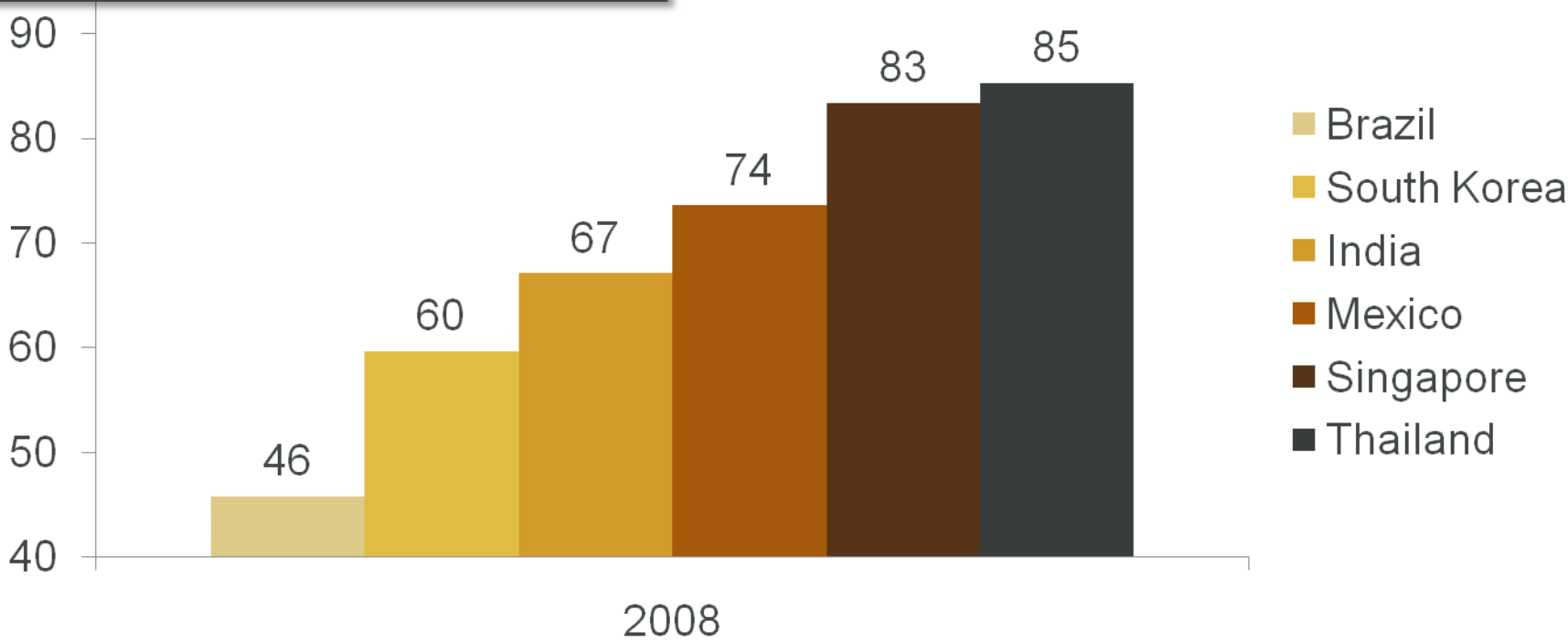
## Prospective *Outbound* Countries



# Citizens' confidence varies widely and may affect competitive positioning.

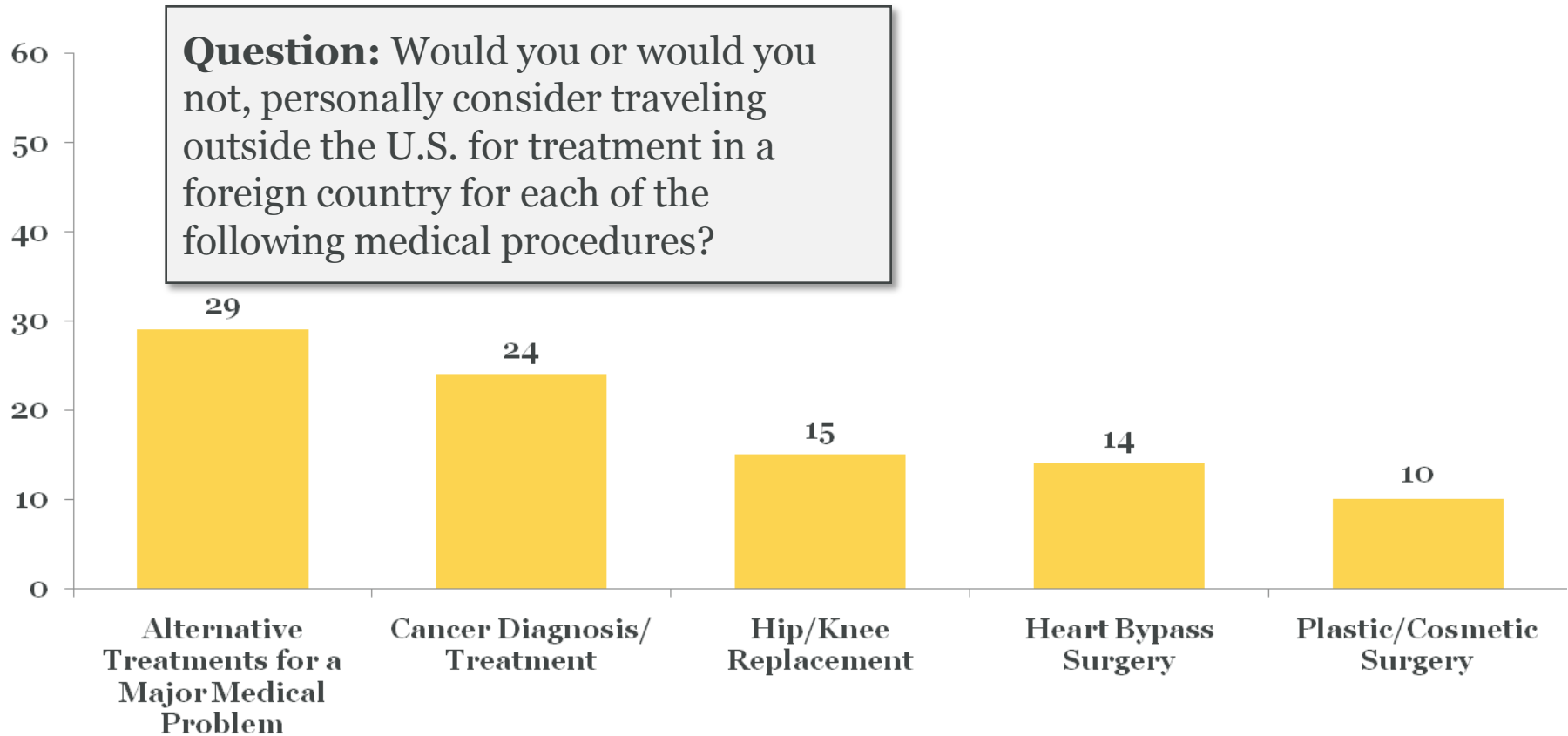
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## Prospective *Inbound* Countries



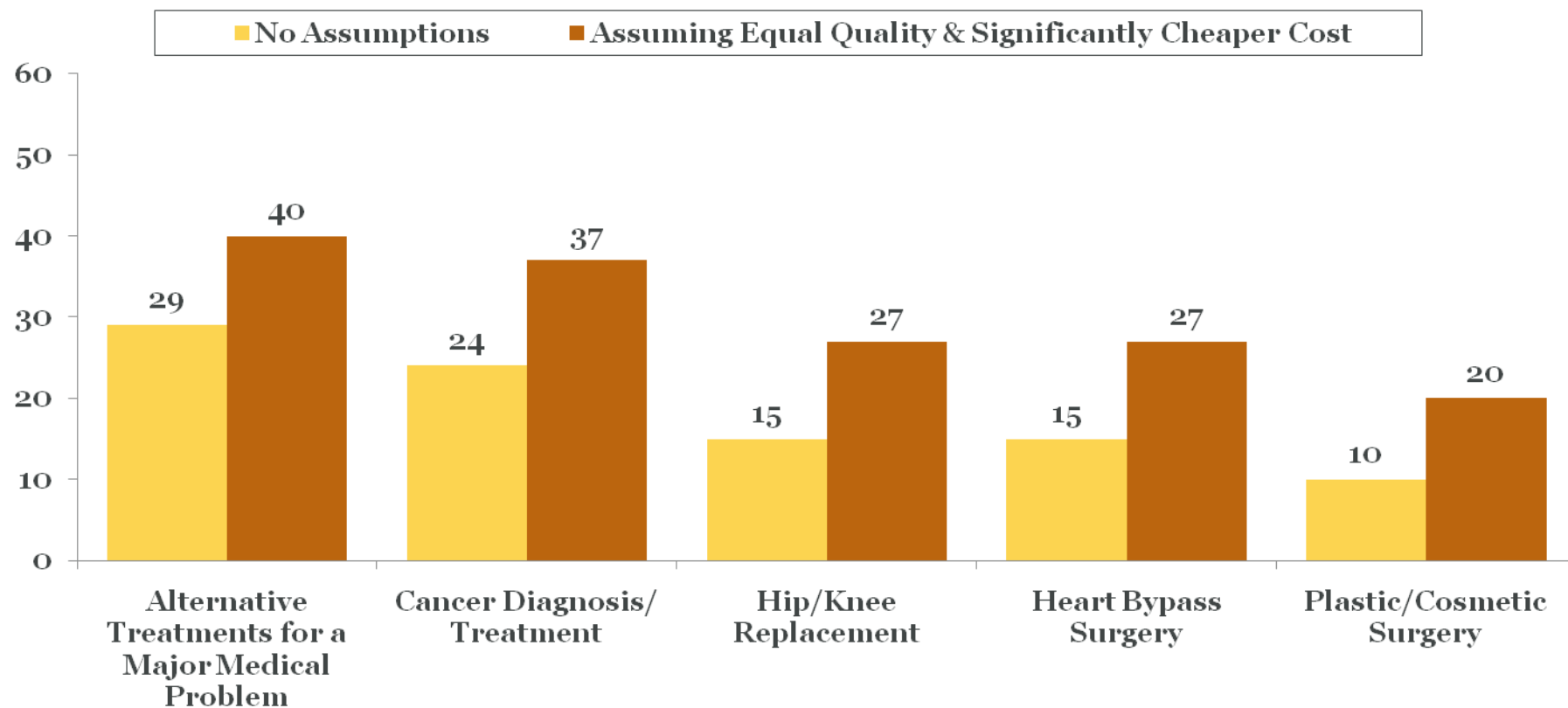


# A sophisticated consumer base is critical for outbound countries.



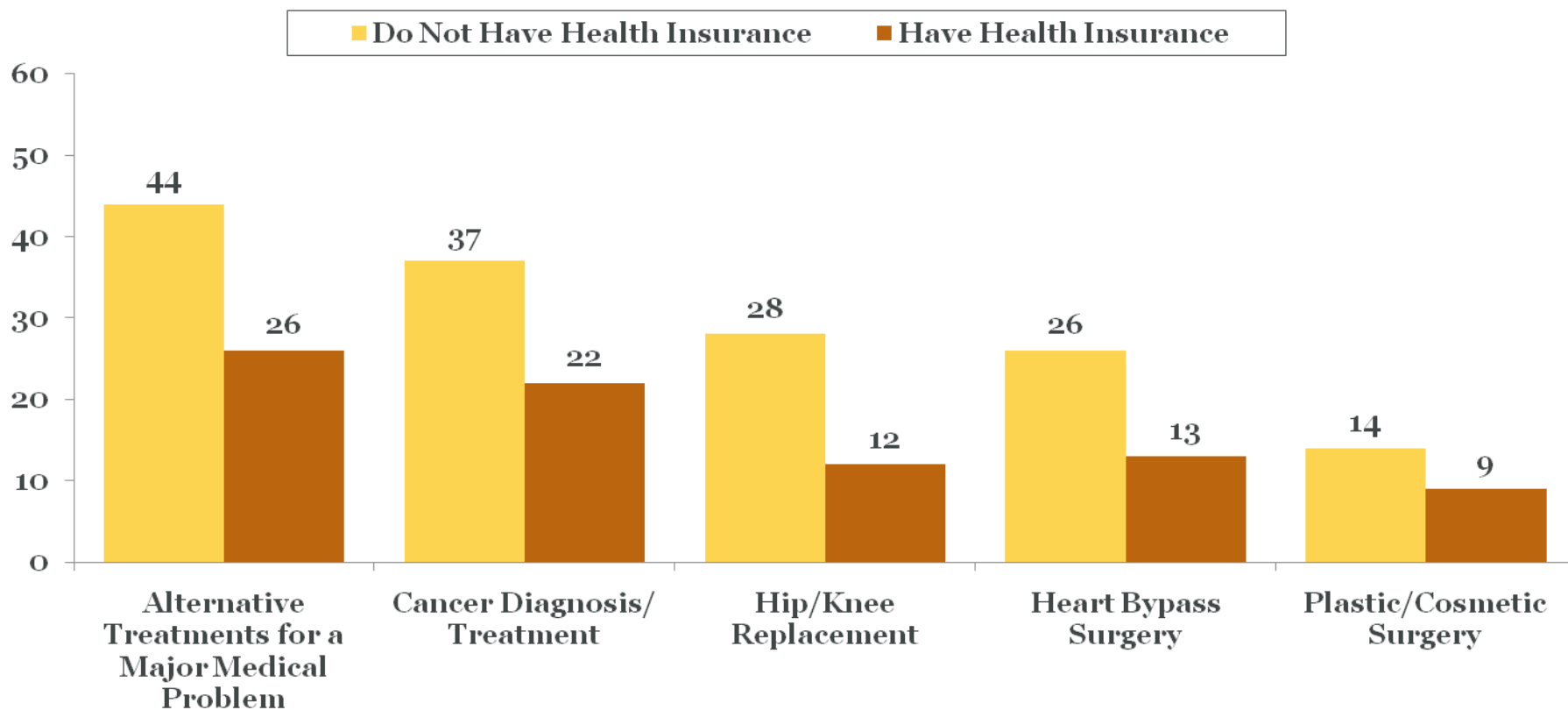
Source: Gallup Poll Daily Tracking, April 16-20, 2009: Would you or would you not, personally consider traveling outside the U.S. for treatment in a foreign country for each of the following medical procedures?

# Willingness to travel abroad for care-with assumptions.



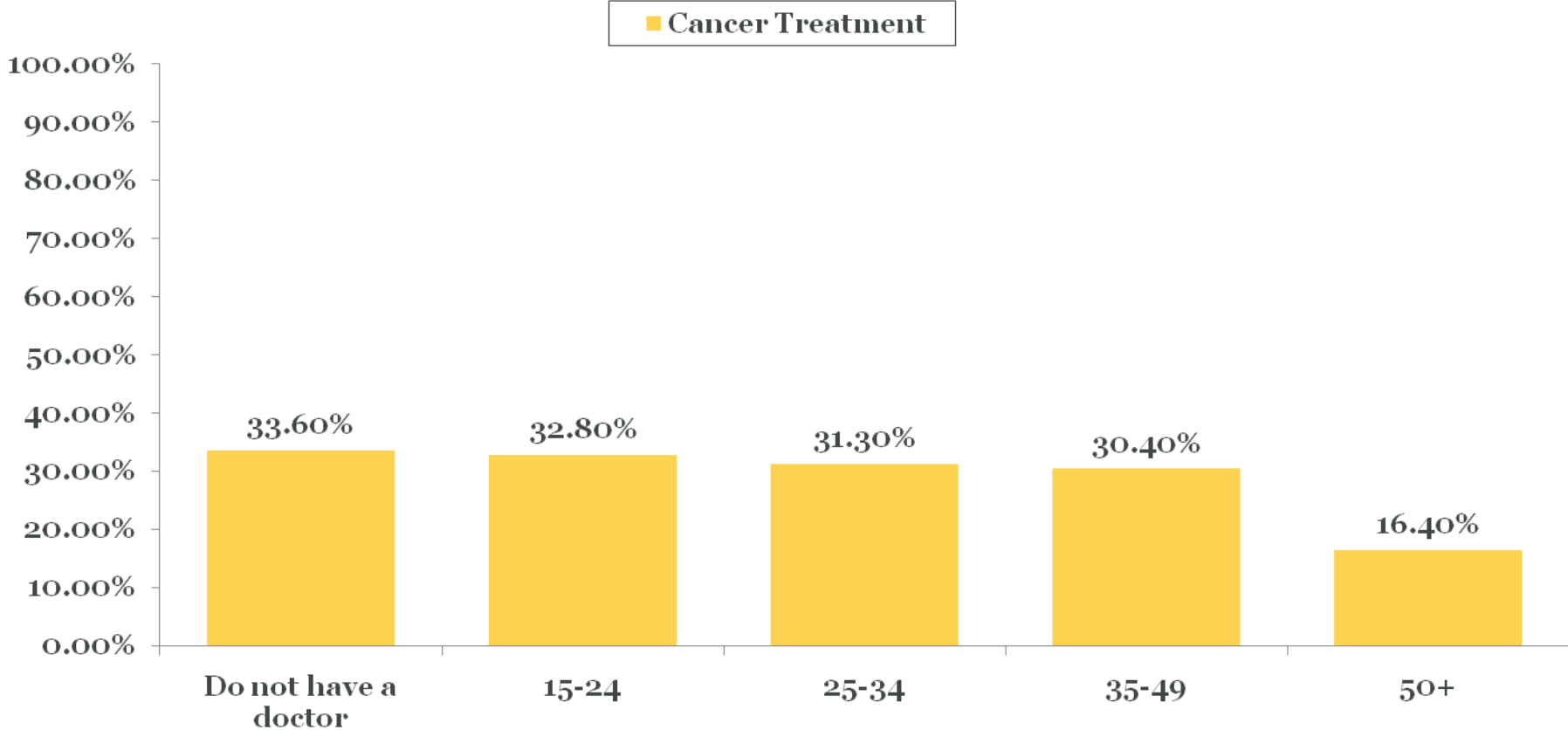
Source: Gallup Poll Daily Tracking, April 16-20, 2009: Would you or would you not, personally consider traveling outside the U.S. for treatment in a foreign country for each of the following medical procedures, assuming equal quality and significantly cheaper cost?

# Willingness to Travel Abroad – Insurance Status



Source: Gallup Poll Daily Tracking, April 16-20, 2009: Would you or would you not, personally consider traveling outside the U.S. for treatment in a foreign country for each of the following medical procedures?

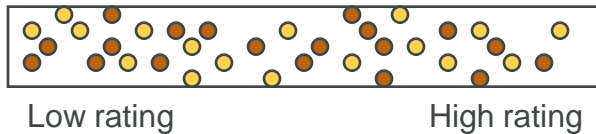
# Segmentation can help attract the right medical travelers.



Source: Gallup Poll Daily Tracking, April 16-20, 2009: Would you or would you not , personally consider traveling outside the U.S. for treatment in a foreign country for each of the following medical procedures?

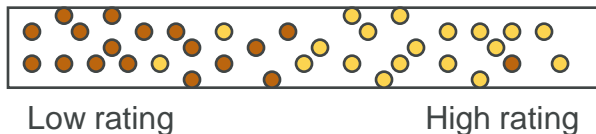
# Are you really engaging your employees ?

## Poor Question



“I feel I am paid the right amount.”

## Great Question



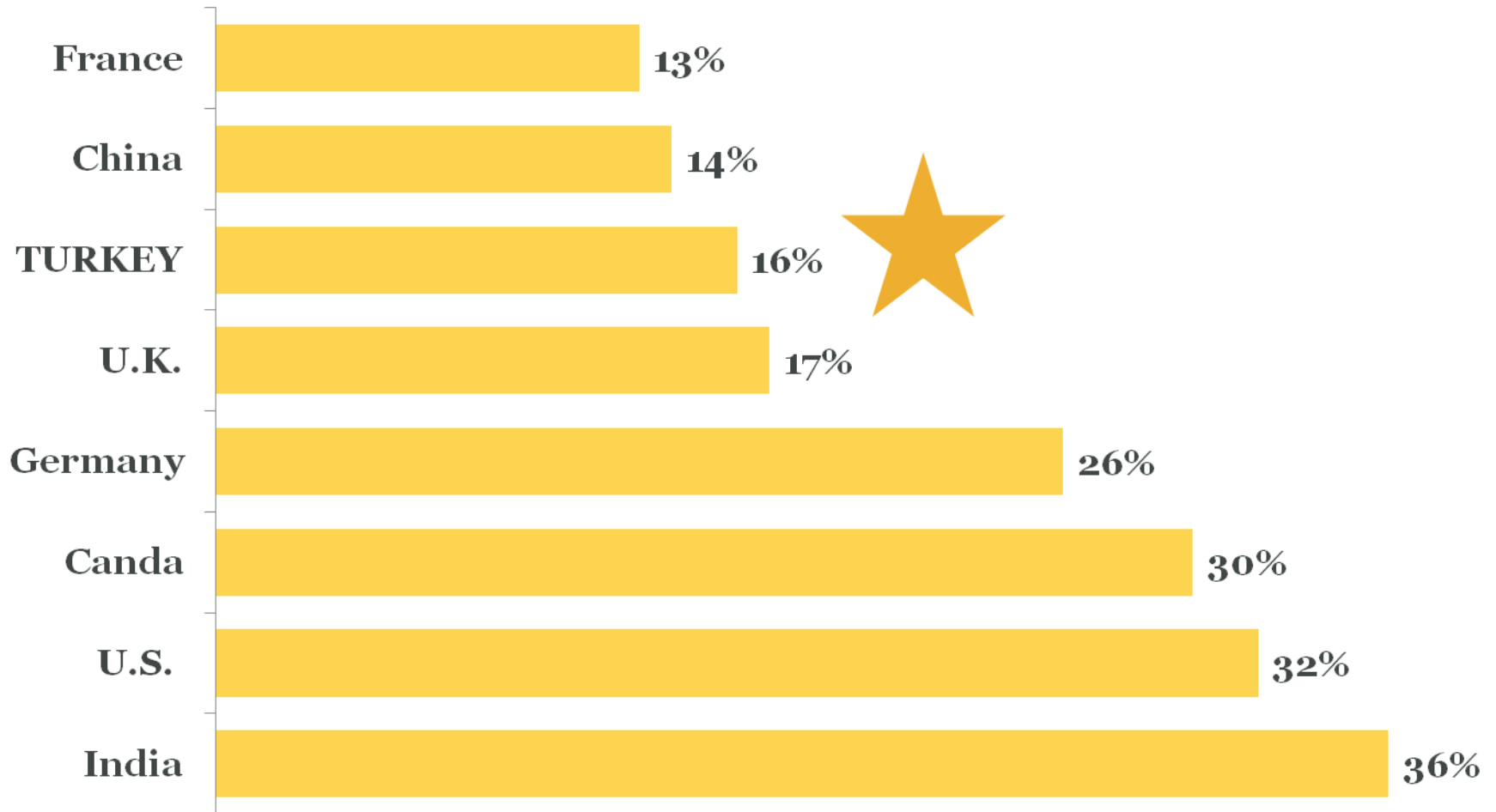
“At work, I have the opportunity to do what I do best every day.”

- More productive workgroups
- Less productive workgroups

# Employee Engagement Questions (Strongly and Precisely Worded)

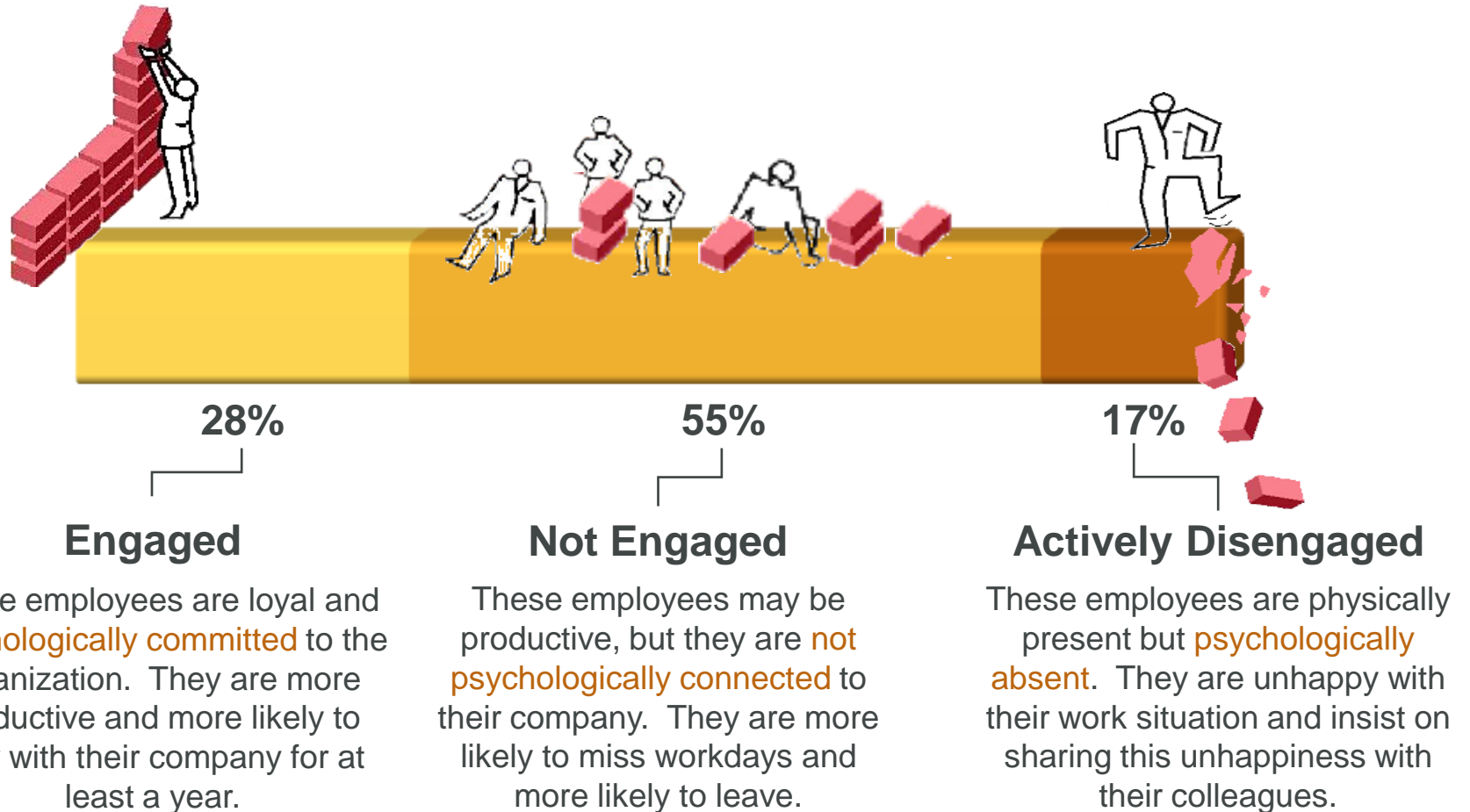
- I know what is expected of me at work.
- I have the materials and equipment I need to do my work right.
- At work, I have the opportunity to do what I do best every day.
- In the last seven days, I have received recognition or praise for doing good work.
- My supervisor, or someone at work, seems to care about me as a person.
- There is someone at work who encourages my development.
- At work, my opinions seem to count.
- The mission/purpose of my company makes me feel my job is important.
- My associates (fellow employees) are committed to doing quality work.
- I have a best friend at work.
- In the last six months, someone at work has talked to me about my progress.
- This last year, I have had opportunities at work to learn and grow.

# Do You Use Your Strengths Every Day?



Note: Percentage reporting they have “the opportunity to do what they do best every day” at work; based on the 2007 Gallup global client database

# Employee Engagement Groups





# Do you understand the behavior of your patients?

Passion is found when a hospital is perfectly suited for the patient. Passion is about being irreplaceable.

**Passion**

Can't imagine a world without  
Perfect hospital for people like me

Pride results when a brand is a public expression of who you are or who you wish to be.

**Pride**

Treats me with respect  
Feel proud to be a patient

Integrity is about doing the right thing. Mistakes happen in all hospitals, but the best hospitals turn them into opportunities.

**Integrity**

Fair resolution of any problems  
Always treats me fairly

Confidence is typically the first step in the development of Emotional Attachment.

**Confidence**

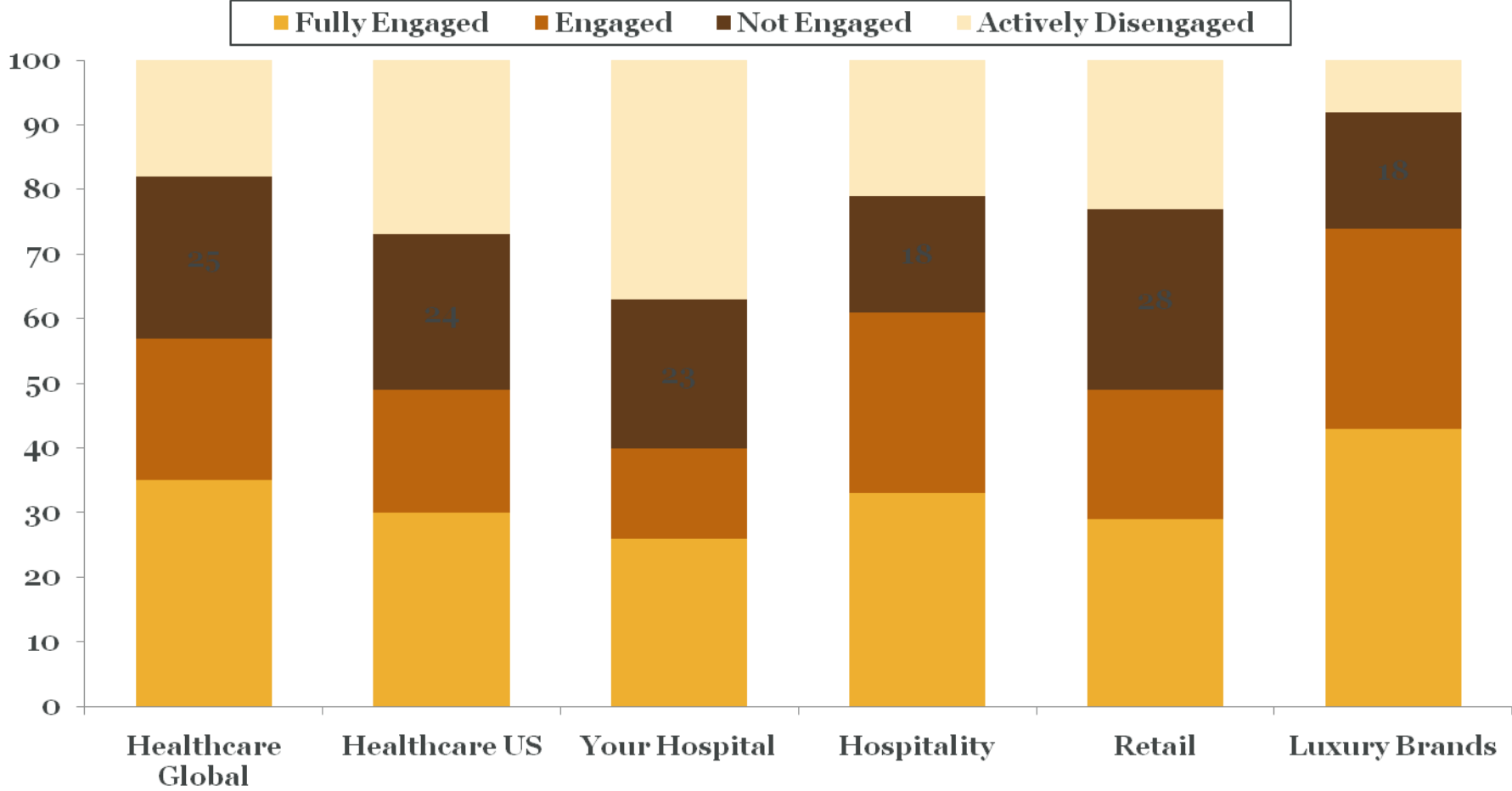
Always delivers on promise  
Name I can always trust

Rational Loyalty is the foundation of Patient Engagement.

**Rational Loyalty**

Overall Satisfaction  
Likelihood to Continue  
Likelihood to Recommend

# Global and Cross Industry Comparisons\*



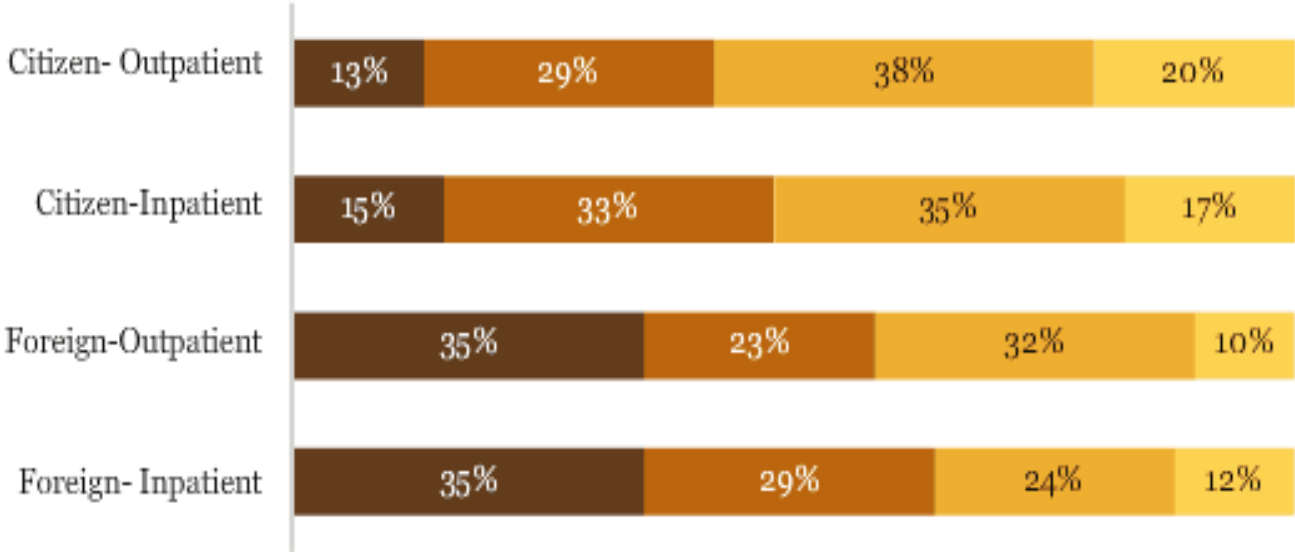
\*Example purposes only – chart does not reflect actual data

# Firm Level: How one Hospital in Asia performs in Customer Engagement

## Patient Engagement at a Private Hospital in Asia

Among citizen and foreign patients

■ Fully Engaged   ■ Engaged   ■ Not Engaged   ■ Actively Disengaged



Based on administration of CE11© Patient Engagement survey

# Some Summary Answers

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- Providers must move quickly beyond cost competition to attract medical travelers.
- Consumers confidence in their own health systems may drive demand to other countries.
- Inbound countries must manage their citizenry's confidence as one prerequisite to attracting global patients.
- Staff and Physicians engagement are critical influencers of a world-class patient experience and must be managed.
- Healthcare must mirror the best practices of other customer-centric industries.

# Answers for Engaging your Patients

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- Begin with your employees
- Measure more than satisfaction
- Harvest best practices
- Reduce variance
- Connect your patients, with passion, to you!

# Concerns in 1974



# Taking quality to a whole new level!





**Thank you!**

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