



Elevating Retail Health in Healthcare and Well-being via Communication and Collaboration Solutions

Opening the front door to healthcare via both physical and virtual means to take a larger role in healthcare transformation

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EXPANDING THE FOOTPRINT OF HEALTH RESOURCES

Historically, times of crisis necessitate accelerated adoption of new and innovative ideas and methods. These periods reinforce the value of embracing technological advances, regardless of previous hesitance toward them. The COVID-19 crisis is no different. It has resulted in making 2020 the year of global unpredictability on all fronts. The viral threat has meant that almost every industry has had to pivot to creative ways of continuing their businesses in some form while maintaining physical boundaries. Frost & Sullivan believes that retail health organizations are a key part of creating higher touch, lower cost connections to individuals needing care. These organizations should play a more strategic role in the shift from sickcare to health, and can deploy digital tools to extend their value to providers and patients. In this paper, we will outline the what and why, and define how retail organizations and their provider partners should move forward in this strategic shift. Organizations that seize this growth opportunity, and learn from the recent past, will gain competitive advantage in both the short and long term.

During the pandemic, retail health entities⁴ have played a valuable role, filling a gap in access to healthcare for patients seeking to avoid visiting high-volume care venues such as emergency rooms or hospitals, which bring with them a higher risk of exposure. Beyond providing medication and medical consultations, retail pharmacies have also become key centers of access for food, healthcare, wellness, hygiene, cleaning products, and other common consumer goods, given closer proximity, in many cases, to consumers than larger retail stores and centers.

Within the continuum of the healthcare system, retail health is one of the few points in the system that offers a scalable delivery model of healthcare solutions supporting treatment, prevention, education, maintenance, and general well-being. Retail health centers also provide widespread reach to populations that typically would not have ease of access to such resources across communities, from urban to rural.

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Healthcare is making demonstrable progress in terms of the management and prevention of chronic diseases. In that context, retail health entities are capable of becoming a valuable center for consumers as part of chronic disease management and prevention. Chronic diseases are the paramount cost driver of health spending today and a leading cause of human suffering and death in most nations. However, the current common mechanism in place for the interaction between healthcare providers and consumers is a relatively infrequent contact cycle, often many months, up to a year, between in-person visits and touchpoints. With retail health playing a larger role in how consumers experience healthcare, people can engage in more frequent contact, along with benefits such as prescription management and monitoring of medication adherence. Stakeholders within retail health, such as a pharmacist, nurse, or physician assistant, can also actively participate in counseling regarding food and nutrition, as well as goal management of dietary restrictions based on the disease condition of the patient.

Retail pharmacies have utilized a variety of digital tools to make a wider health and wellness connection with consumers. Mobile apps, telehealth platforms, messaging reminders and even reward programs allow for a diverse set of interactions with consumers as both people and patients. Frost & Sullivan believes retail health organizations can more strongly position themselves as a key access point for delivering health and wellness by integrating these channels via an omnichannel collaboration platform, enabling the expansion of services and the sharing of information, which are crucial to success in the current healthcare environment.

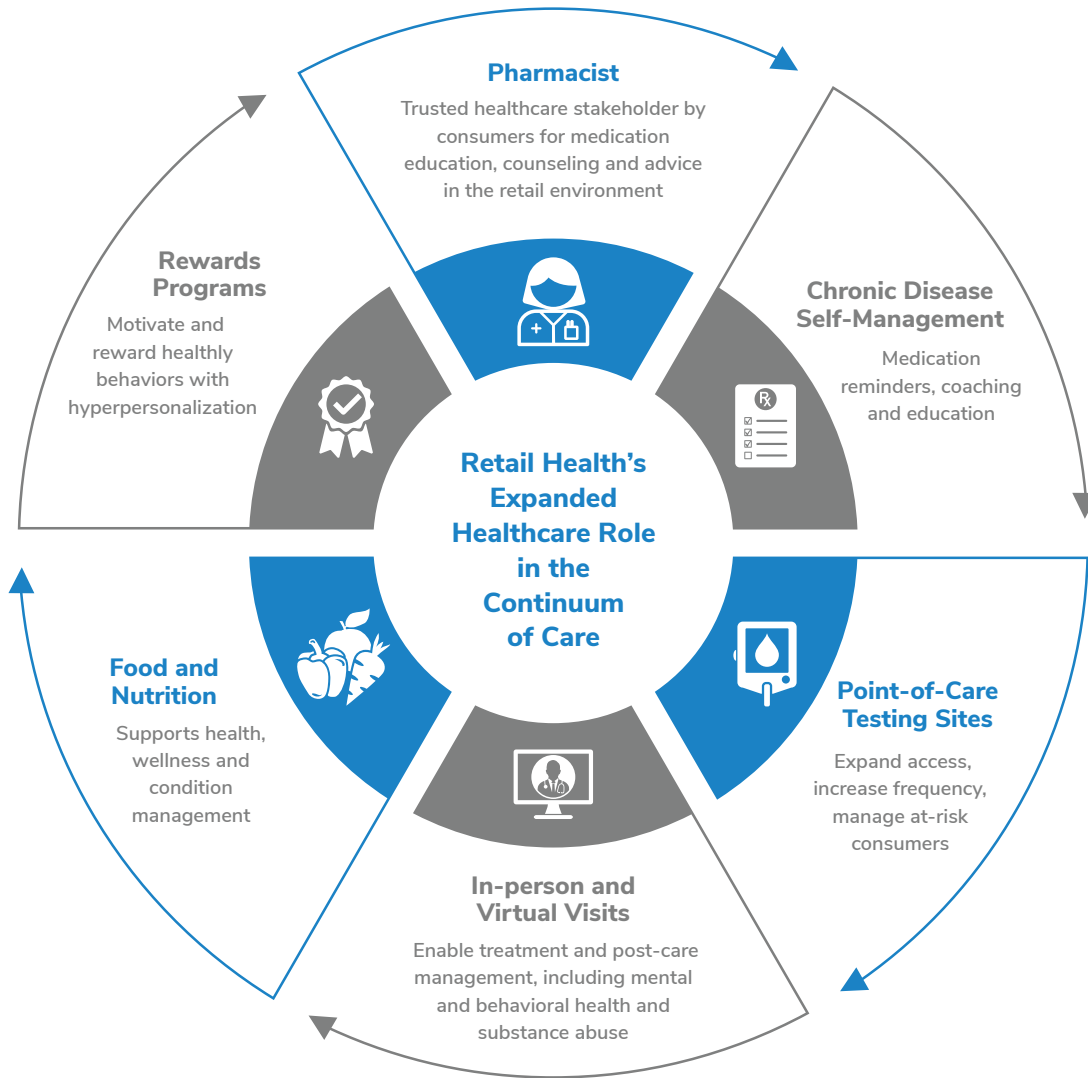


CONNECTING TO PATIENTS AND CONSUMERS

The COVID-19 crisis has brought forward the need for expansion of sites for triage, screening, diagnostics, and community care while minimizing the risk of transmission. It has also brought to light the challenges facing the healthcare system in maintaining ongoing care of patients with chronic diseases while minimizing physical contact to respect social distancing guidelines.

Currently, there are approximately 2,000 retail health clinics in the US.² In the past, retail health sites and clinics have had noticeable success in offering value through convenience and improved access. Typical benefits include ease of access due to availability on weekends and longer hours, elimination of wait times for patients, direct access to prescriptions, food and healthcare goods, and more locations within communities. Retail clinics can also encourage and assist patients in finding a primary care physician for those who lack such a provider relationship.³ Retail chains like Boots UK provide direct connections to physicians widely available via telehealth links in their stores. Retail health can further develop its role as a strategic partner in the health system and the community by expanding on the pre-care, during, and post-care health services for consumers (Figure 1).

Figure 1: Retail Health’s Expanded Healthcare Role in the Continuum of Care



Chronic Disease Self-management

The growth in chronic diseases, digital health and employer wellness initiatives, among other influencing factors, has expanded consumer self-management of chronic conditions. As a part of that journey, consumers are requiring easy access—which can include home delivery—to vital signs devices, medications, nutritional supplements, medical equipment, education, and foods that support them in their goals specific to their condition(s). Retail health can easily provide access to those needed elements for consumers. Training, education and responding to consumer questions will be necessary to support this role. Much of this can be done via asynchronous communications or video on demand.



In-person and Virtual Visits

Consumers will progressively experience healthcare as a mix of traditional in-person and virtual encounters with healthcare providers and other care extenders. According to Frost & Sullivan research, virtual visits leveraging telehealth will see a 100% increase over the next two years in the post-COVID-19 environment, given dramatically higher demand as a result of the pandemic.⁴ Telehealth has finally reached a tipping point in scale and acceptance, with both providers and consumers experiencing dramatic levels of new exposure to virtual healthcare services.

Retail clinics, such as CVS MinuteClinic, are providing both on-site and virtual care service access to consumers.⁵ For patients, telehealth can be leveraged to receive services while minimizing contact risk, including effortless access to mental and behavioral health services, one of the most important issues in healthcare today. More flexible methods for consumers to receive mental health counseling can result in an overall increase in medication adherence since many mental health issues are a major risk factor for noncompliance with medical treatment.⁶

To provide virtual services, retail clinics should look to communication platforms that provide attributes such as secure chat, video, and voice capabilities. Value-add features, such as the ability for users to blur backgrounds, help provide privacy and keep security and safety in mind during sessions. For the pharmacy side of retail clinics, telehealth provides easy access to telepharmacy sessions, which can support the needs of multiple sites within the chain and allow for direct pharmacist-patient communication and counseling remotely.

“Retail health’s accessibility within communities creates a center of care that can continue to grow in the level of services provided, including those of critical importance in a post-COVID-19 environment.”



Pharmacist Inclusion in Patient Care

Pharmacists are at the forefront of consumer interactions in healthcare and are easier for consumers to access in an ambulatory setting, versus direct and immediate access to clinicians in other practice sites. The two most common services offered by pharmacists for patients directly are medication education and counseling.⁷ Aside from the pharmacist role with patients in the retail setting, telehealth Medication Therapy Management (MTM) programs also provide an opportunity for pharmacists to directly impact patients in their home environment, where enrollees may be elderly, have complex polypharmacy regimens, and can use adherence support and educational interactions for optimal outcomes.

For people with chronic conditions or who need pain management and mental health support, the pharmacist is someone they see far more frequently than any primary care physician or specialist caring for them, which often leads to a trusted relationship between the pharmacist and the patient. For other types of consumers, the pharmacist is often the person they go to for advice on a range of health and wellness-related questions while sorting out OTC drug purchasing, medical equipment and supplies, supplements, and other types of health and wellness products available in the retail environment.

To best leverage the pharmacist role as part of a patient's care team, the pharmacist needs multiple communication options for two-way interactions with patients and needs a channel to connect with other care team members to pass on data and clinical notes, as well as confer regarding recommended follow-ups or next-step actions by someone in the care team.



Rewards and Incentives Programs

The widespread availability and ease of access for patients can allow retail health entities to play a strategic role in partnering with them to build a healthy living plan.

Rewards programs can be a key channel for consumer activation and engagement in their health and with the retail chain by crediting rewards points for activities such as filling prescriptions, managing prescriptions online, obtaining vaccines, and certain types of retail purchases such as healthy foods, health/wellness products or beauty products. Via partners, points can be obtained via account integration with wearables, for example, giving consumers rewards for activities such as measuring daily exercise, movement, and regular weigh-ins. Hyper-personalized assets offered by retail health companies can be used to motivate and reward healthy behaviors to ensure long-term incentivized engagement.

CONNECTING EMPLOYEES TO ENHANCE CAPABILITIES

All healthcare site types in the continuum of care are seeking to improve communication and collaboration as part of improving clinical, operational and financial goals for their organizations. For retail health, the focus on achieving better connections with and among staff cuts across both healthcare sector and retail sector needs.



For pharmacists, nurse practitioners and other patient-facing clinical members of the care team in the retail health environment, leveraging a robust multimodal communication and collaboration platform provides enhanced tools for remote interaction with their patients and other outside clinical stakeholders, including remote pharmacy consultation as well as other staff in their organization. Aside from patient-facing use, platforms include features for one-to-many group-based trainings on new organizational protocols, onboarding new employees, file-sharing access, shift management, and workforce scheduling. These types of features can be leveraged on a day-to-day operational basis for better connection and engagement of the workforce.

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During the COVID-19 crisis, retail sector employees were deemed essential workers, and the rapidly developing situation necessitated a reactionary evolution of protocols for their protection and to maintain social distancing guidelines. Staff needed to adopt new disinfection procedures in stores, and there were new requirements for customer interactions. The ability to quickly and clearly roll out new processes, procedures and protocols to staff was highly valued.

Clear instructions can be sent and videos broadcast, showing new required steps. A broadcast feature allows straightforward dissemination of such information with an instant-access platform for concurrent feedback and support during the implementation process. This enables reaching all staff members within their schedule, with consistent, clear messages while demonstrating new requirements. Having these capabilities eases the load of the logistical planning and coordination phase of these protocols for executives and employees.

Secure internal video streaming features can also be used to upload and store onboarding and training content, including speech-to-text transcriptions. Such transcribing features can be useful for organizing meeting notes, creating training manuals, and capturing workflow processes for internal audio- and video-based meetings.

Better ways to support internal communication are of paramount importance to enterprises moving forward in the digital environment. The leveraging of email systems for this purpose continues to decline within organizations as they seek to efficiently and instantaneously disseminate all crucial information to the concerned individuals. Communication platforms with a feed feature allow users to track their recent activity and provide immediate access to bulletins and notes that require their attention. Employee survey functionality within a platform can allow organizations to keep open communication with the employees and maintain continuous feedback to confirm understanding of processes and new protocols being put in place.

KEY REQUIREMENTS FOR DIGITAL TRANSFORMATION TO SUPPORT RETAIL HEALTH'S MORE STRATEGIC ROLE

Given the growth and influence of consumerism and digital trends, Frost & Sullivan believes there is an evolving dynamic intersection between patient-consumers and their healthcare experiences and desires. Communication is evolving at a rampant rate and there is an infrastructure gap in healthcare to serve as an effective means to connect consumers to information and support. An ideal communication and collaboration platform would elevate retail health into a more strategic role in health and well-being. Consolidating communication within the team can enable staff to have the right information at the right time to be most effective in their daily work.

Security

Cybersecurity to maintain privacy is currently the leading IT priority for healthcare provider organizations.⁹ IT solutions leveraged within the healthcare vertical require enterprise-class technology backed by advanced security and compliance capabilities, including those specific for HIPAA⁹, GDPR, HITRUST and standards such as ISO 27018¹⁰ and ISO 27001¹¹. Platforms with an identity and access management feature also ensure the security of protected health information (PHI) while allowing for convenient multichannel connection capabilities with confident protection from data breaches or exposing sensitive patient information.



Video, Messaging, Voice, Screen Sharing

A single, multi-modal platform for communication within an organization can make a stark difference in team productivity, team satisfaction and end-user engagement. Retail health clinics can benefit from this type of platform, supporting health professional-to-professional consultations, patient-provider encounters, secure team messaging, meeting collaboration, and other progressive components of digital communications necessary in the work environment. More advanced messaging features, such as the ability to push through urgent messages, prioritize messages and lower alert fatigue, and track message delivery with read receipts are important healthcare sector communication features used in health systems and physician practices and can also benefit retail health teams.

Integration Capabilities

A communication and collaboration platform leveraged in the retail health environment should be integrated with clinical and administrative applications to enhance the end user experience and meet all care delivery and business operational needs. This IT integration will eliminate the need for multiple logins, which is often stated as a source of frustration for pharmacies, enabling a singular access interface to keep operations simplified and streamlined.

For example, the ability to integrate with workforce management and human capital management (HCM) software is critical for enterprises. According to Frost & Sullivan research, employers must harness technology-enabled platforms that empower a cost-effective workforce and HCM for healthcare and streamline access to real-time workforce information, insights and their own personal information, such as accruals and schedules, to provide a more positive employee experience.¹²

“ Leveraging a communication platform with consistency aligns directly with desires for improved ease of use and embraces user expectations for a more consumer-like experience within systems deployed in their enterprise environment.

Consistent User Experience Everywhere

Now that healthcare has moved into the post-EHR era of adoption, there is an increased focus on improving and having optimal usability of health IT and other IT systems deployed within healthcare organizations, whether the hospital, physician practice, retail clinic, or urgent care facility. According to Frost & Sullivan healthcare sector research, having a consistent user experience across different form factors is a top desire in enterprise communication platforms.¹³ Leveraging a communication platform with consistency aligns directly with desires for improved ease of use and embraces user expectations for a more consumer-like experience within systems deployed in their enterprise environment.

CONCLUSION

Moving forward, retail health should look to further expand its role as a viable strategic partner in the continuum of care. Retail health's accessibility within communities creates a center of care that can continue to grow in the level of services provided, including those of critical importance in a post-COVID-19 environment such as testing and vaccination. If retail health centers deploy the right multi-modal, integrated communication and collaboration platform, it can transform them into community health hubs to help propel the throughput of patient care and place them firmly at the intersection of health, retail, healthcare and wellness.

This heightened role of retail health within communities would lead to benefits to the healthcare system, such as cost reductions, by more closely managing chronic conditions. It benefits healthcare providers by becoming a reliable support system and added site for coordinated care in a patient's care plan. It benefits payors by reducing the cost burden from adverse outcomes of poorly managed conditions, as well as proactively addressing patients who could be at risk. It ultimately benefits the retail health entity by positioning itself as a valuable center of healthcare for consumers.



ENDNOTES

- 1 Retail health refers to health and wellness services delivered via a retail store. This can include pharmacy, health centers located within a retail site, telehealth services delivered via a retail entity, and other health and wellness products available in retail settings or through retail store services.
- 2 “The 2019 Economic Report on U.S. Pharmacies and Pharmacy Benefit Managers,” Drug Channels Institute.
- 3 American Association of Family Physicians, 2019 Policy citation at <https://www.aafp.org/about/policies/all/retail-clinics.html>.
- 4 “Telehealth – A Technology-Based Weapon in the War Against the Coronavirus, 2020: Social Distancing Needs Will Present Both Growth Opportunities and Challenges,” Report K488-48, Frost & Sullivan, April 2020.
- 5 Seen at <https://www.cvs.com/minuteclinic>.
- 6 DiMatteo, M. Robin, et al., “[Depression is a Risk Factor for Non-compliance with Medical Treatment](#),” Arch Intern Med. 2000; 160(14):2101-2107.
- 7 “National Pharmacist Workforce Study 2019,” American Association of Colleges of Pharmacy (AACP).
- 8 “2019 HIMSS U.S. Leadership and Workforce Survey,” Healthcare Information and Management Systems Society (HIMSS).
- 9 Health Insurance Portability and Accountability Act
- 10 ISO/IEC 27018:2019 establishes commonly accepted control objectives, controls and guidelines for implementing measures to protect personally identifiable information (PII) in line with the privacy principles in ISO/IEC 29100 for the public cloud computing environment.
- 11 ISO/IEC 27001:2013 specifies the requirements for establishing, implementing, maintaining and continually improving an information security management system within the context of the organization.
- 12 “2020 Company of the Year Award in Workforce and Human Capital Management for Healthcare–Kronos,” Frost & Sullivan Best Practices Research.
- 13 “Secure Messaging and Communication Market Research,” Frost & Sullivan, December 2018.

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