

# Top Ten Healthcare Game Changers

Canada's Emerging Health Innovations and Trends



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From health reform and skyrocketing costs to consumer expectations and technology advances, healthcare in Canada is undergoing transformation. The entire health continuum—providers, governments, public health organizations, agencies, patients and others—is feeling the impact and looking for new solutions.

Accenture has drawn on our global healthcare experience and work with health organizations across Canada to develop this list of healthcare game changers. These are technology-driven, information-powered trends, which include organizational and structural reinvention, new options for providers and care delivery and innovative consumer empowerment tools. While each is unique, together they will contribute to a new model of Insight Driven Health for Canada.

## 1. Healthcare Clouds

Part of the utility computing trend, healthcare clouds will push the industry's reliance on large monolithic systems to point-of-care systems. Healthcare clouds will help providers access and store information in more efficient, flexible and secure ways while helping save money—driving the push toward physician electronic medical records. For patients and consumers, healthcare clouds will be a platform for personal health records, offering new access, control, visibility and convenience. While clouds are focused on information, services may also be delivered over these emerging healthcare platforms.

## 2. Health Analytics

To reach the next level of quality and innovation in care delivery, practitioners require a comprehensive set of facts around healthcare delivery including compliance with treatment protocols and measurement

of system performance and health outcomes. Canada's growing network of electronic health records lays the groundwork for this next-level approach with advanced analytics. Together, advanced analytics and new data visualization techniques will help unlock the power of data to drive more informed decision making and, ultimately, higher quality, lower cost care—from public health monitoring and prevention to the treatment of chronic illnesses.

## 3. New Payment Models

The convergence of health reform, new data availability and access, and the push to lower healthcare costs will drive the shift toward outcomes-based funding in Canada and around the world. New funding models will be linked to meeting specific targets, adjustments for patient case mix and other measures related to achieving quality outcomes.

## 4. Tablet Computing

Easy-to-use and portable, tablet computers will play a critical role in unlocking clinical adoption of technology, like physician electronic medical records. Tablet computers offer the advantage of ease of use, portability and long battery life. The devices allow users to have "visual" conversations with patients for an engaging user experience. The combination of consumer and provider interest could drive a preference for tablet computers over traditional computers.

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## 5. mHealth

Mobile technology and mobile apps have become a part of everyday life for many people. Bant, developed in Canada, is one of the new class of apps simplifying diabetes management. Users can record their glucose readings, link to popular health accounts and share information. The popularity, and consumer appetite, for mobile health apps will continue to rise. These apps will become more sophisticated, empowering consumers to change their behaviors by making it easy to monitor health information. Mobile apps will become another channel for real-time, patient-provider interaction.

## 6. Social Networking

Patients are using the Internet and social networking tools to connect with one another and to share information about their health and healthcare experiences. Moving beyond initial trends of connecting and information sharing, the next wave of opportunity will be around patients managing and "curating" healthcare information via social networking sites. Consumers will be able to access trusted sources and reliable information that reflects patient needs. Social data on healthcare (perception of care, treatment regime, experience, etc.) will be a key part of this content.

## 7. Point-of-Care Diagnostics

Point of care tests (PoCTs) are bringing new convenience, control and ease-of-use to consumers. Recent advances toward "lab on a chip" allow for thousands of tests to be run on just a few drops of blood. PoCTs will continue to simultaneously drive consumer empowerment and improve care with the ability to provide reliable and "instantaneous" results without the need for a large centralized lab. This transformation can also play a role in lowering healthcare costs.

## 8. Hospital at Home

Looking to control healthcare costs and provide quality, effective care, there is a push to deliver more services within the home for patients whose diagnoses meet certain eligibility requirements. Technology advances will continue to enable more hospital at home options for diagnostics, the care of chronic conditions and post-surgical recovery. This trend is key in lowering hospital admissions and costs, eliminating hospital-acquired infections and supporting the patient's comfort and the physical and mental wellbeing so essential to recovery.

## 9. Regionalization 2.0

The clear need to lower healthcare costs in the wake of global health reform mandates has sparked moves toward the regionalization of healthcare. The overall aim is to achieve true integration. Already, regional integrated care networks are emerging to drive new efficiencies and economies of scale. The emergence of these larger regional systems along a centralized governance model and stable funding will continue to enable better integration. Key benefits will include the consolidation of systems, standardization of care protocols and the development of shared service models or managed services contracts.

## 10. Exporting Health

Healthcare organizations outside of Canada are entering new markets—foreign markets in particular—in an attempt to generate new revenue. Opportunities include partnerships, licensing deals, expansion into new markets and commercialization of IP. While the need to generate new revenue will continue to drive this trend, other factors such as the need to develop new skills, maximize existing resources and build a healthcare brand will come into play.

## For more information

To learn more about these healthcare game changers—and how they might impact your organization—please contact Sanjay Cherian, Health Industry Lead, Canada, at [sanjay.cherian@accenture.com](mailto:sanjay.cherian@accenture.com) or +1 416 641 3718.

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