

Becoming a healthcare platform

As we've been discussing over the past few years, several environmental forces—shifting consumer behavior, evolving demographics, new technology, and a flood of new market entrants—are pushing health systems to adopt a more consumer-centric business model. **Systems must develop the capabilities needed to create an omnichannel consumer loyalty and population management platform.** This platform will be the foundation for connecting consumers, curating providers, and coordinating care.

To achieve this vision, **health systems must deliver value across two dimensions: increasing their proximity to the consumer (our y-axis) and their proximity to the premium dollar (our x-axis),** as shown in the graphic below. Traditionally, health systems have operated primarily in the lower-left quadrant, as “care suppliers.” Some have spent considerable time and resources across the last decade, pushing closer to the premium dollar, to become “population managers.” But, importantly, managing population health is neither patient-facing, nor something consumers demand and seek. To build deeper consumer loyalty, health systems must also move up the y-axis, **creating a “care ecosystem” that provides “anytime, anywhere” care through multiple channels,** including virtual and home-based solutions. And for certain populations, like Medicare Advantage, it will make sense for many systems to also explore becoming the “premium owner”, owning the full care budget and ensuring the incentives to design a consumer-centric offering. **The ideal health system platform should combine all four of these identities, tailored to the local market situation.**

Finding the Sweet Spot for Platform Value

