

Future of Health(care) – *Silver Linings Playbook Edition*



CAHSPR ACRSPS

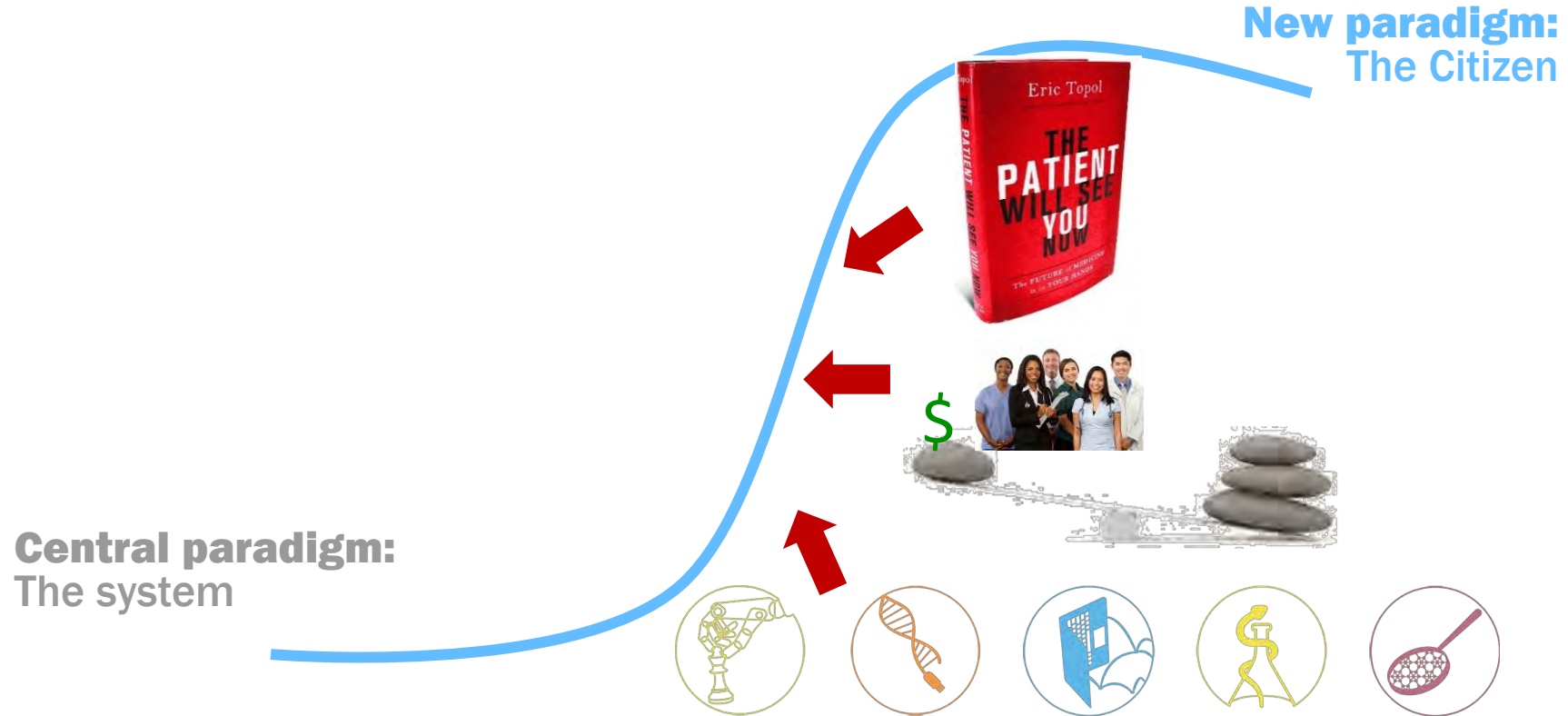
Canadian Association for Health Services and Policy Research
L'Association canadienne pour la recherche sur les services et les politiques de la santé

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May 28 2020

@ZaynaKhayat @SEHC_SEHealth #VCAHSPR2020

Drivers of the future of health



The Future of Health(care)

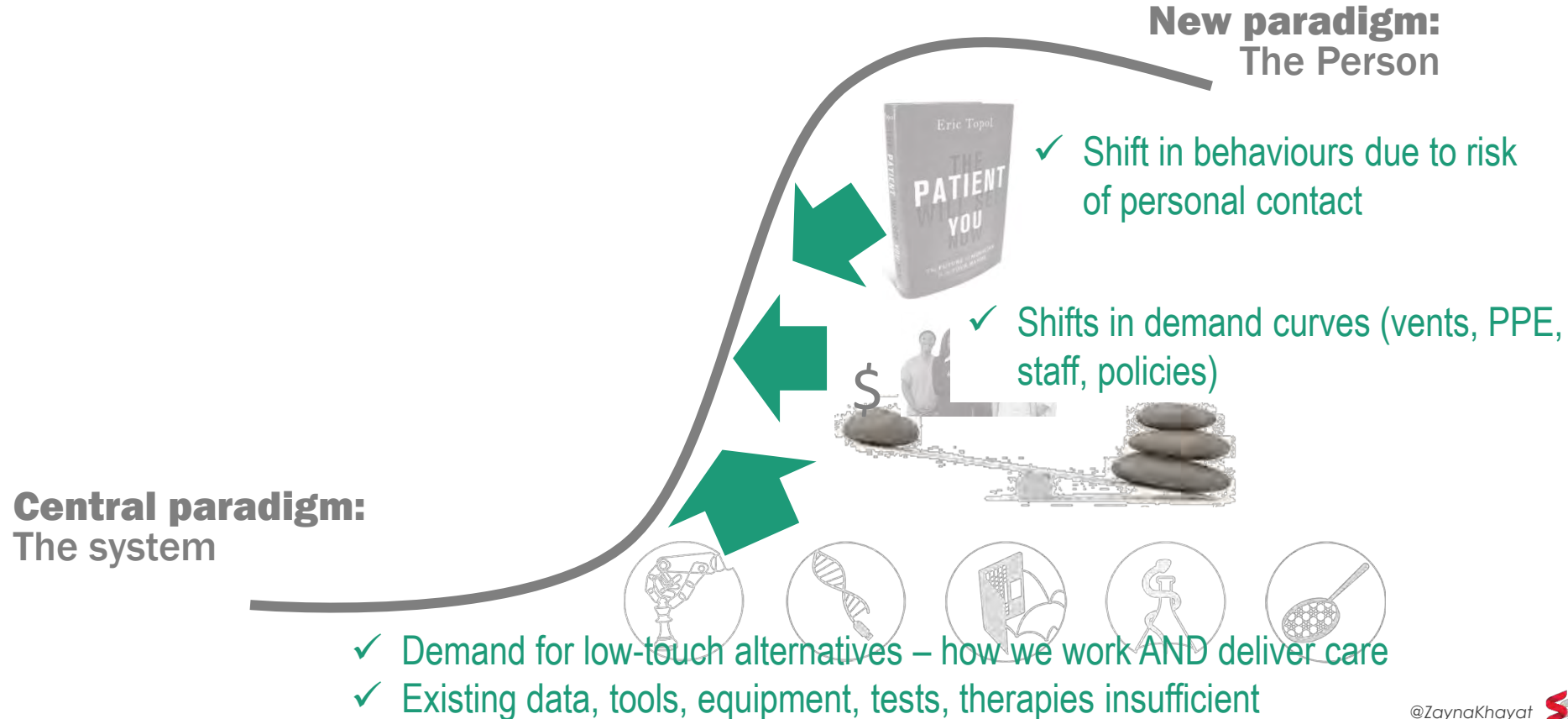
Today: System

TIMING	Reactive, sick care
PRECISION	1 size fits all, crude, analog
MODALITY	Institution-centred
DURATION	Episodic, intermittent, silo'd
POWER	Provider
CURRENCY	Volume, inputs, costs, fee-for-service

Future: Citizen

Proactive, predictive
Personalized, intelligent
Omnichannel
Continuous team
People-powered
Results, fee-for-health

Drivers – COVID edition



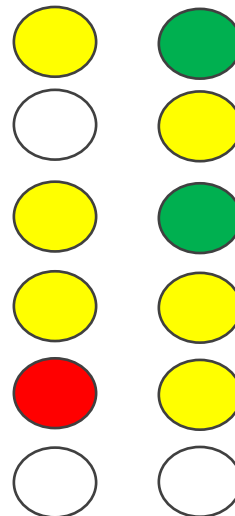
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Now

- (Continue) to react– design solutions with intention for the future

Near

- Shock-proofing – next wave, community spread, delayed care, mental health, new patient & family behaviours & patterns
- Infrastructure – hiring, training, digital, PPE

Far

- ~~Longterm~~ Elder care system 2.0

Comus - John Milton (1634)

"I see ye visibly, and now believe
That he, the Supreme Good, to whom all things ill
Are but as slavish officers of vengeance,
Would send a glistering guardian, if need were
To keep my life and honour unassailed.
Was I deceived, or did a sable cloud
Turn forth her silver lining on the night?
I did not err; there does a sable cloud
Turn forth her silver lining on the night,
And casts a gleam over this tufted grove."



Black Plague [14th c. Europe] ~25M (1/3 of EU)

Power shift to
scarce labor
resources

Credited with
ending feudalism
& serfdom

World War II Women participation in workforce

Government role i.e.
spending >>40% GDP

Products: Jet engine,
pressurized aircraft cabin,
helicopter, atomic tech,
radar, synthetic rubber,
computers, rocketry,
penicillin, internet

9/11

Reshaped **security & transportation** policies
(worldwide)

Shift in attitudes re:
trade-off between
personal privacy & security

NYC **rebased economy**
across 5 burrows

2003 SARS [China]

Changed attitudes
toward **shopping/ consumption**

e-commerce channels
opened and stayed –
paved the way for rise
of Alibaba & other
digital giants

Financial Crisis

Gave rise to service
marketplaces (Airbnb)

Gave rise to freelance /
independent **gig worker**
marketplaces (Task
Rabbit, Uber, Lyft)

Rapid fiscal policy
making

Barriers to innovation are *SMASHED*

1. Mindsets

2. Entrenched producer interests

3. Politics

4. Governance/structures

5. Silos at many levels

6. Outdated regulations /policies

7. Financing & incentives

8. Data flow, infostructure

9. Adoption pathways [or lack thereof]

10. Capacity for innovation

Future:
Citizen

the
nd
orld

Today:
System

More health innovation in 10 days than 10 years

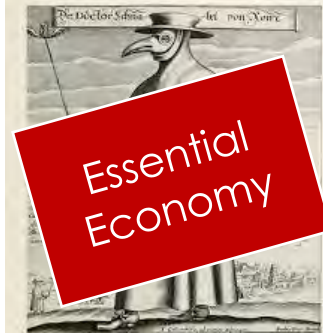
Healthcare care model, product, experience, & business model innovations

1. **Digital channels:** fee codes make it allowed [or free access] – GPs / mental health / home care
2. **Health workers:** Cross-licensing, out of retirement, med students in field, sharing staff, upskilling (e.g. flight attendants)
3. **Data & research: real-time generation & analysis, nouveau transparency, data liquidity; research grant \$ in days**
4. **Hospital capacity:** field or overflow hospitals in conference centres, arenas, hotels ... in days; low value dropped
5. **Testing:** drive through testing, kiosks; results from days/labs → hours → minutes/point of care; self test; real time data
6. **Reimbursement coverage:** virtual care, non-insured, non-documented, out of system
7. **Regulation fast-tracked:** FDA, Health Canada, payers – tests, PPE, vaccine trials, vents, reimbursement, etc.
8. **Policy: Public health policy innovation in hours; economic policy innovations in hours and days**

Product and service pivots in non healthcare industries

- **Social innovation:** libraries become food banks, volunteer drives, delivery services to seniors, relief funds
- **Civilians, infographic artists, other data interrogators** – aggregating data, finding meaning better/faster than experts
- Tech giants & startups: **contact tracing apps & tools**
- Dyson, Tesla, Ford, etc: **ventilators**
- Apparel brands [H&M, Vutton, Burberry, Haynes, Bauer, Gap, Can. Goose], 3D printers - **masks, gowns, face shields**
- Brewers, distilleries, marijuana companies: **Hand Sanitizer**
- **Financial services:** ATM that disinfects cash; help fixed income smooth cash flow challenges
- **Essential workers & elderly:** Free tech & wifi; early open times, queues at banks/grocery; free food & other perks

Solidarity – intergenerational; inter-organizational; inter-provincial; **inter-sectorial**; fed-prov?; international ...



Essential
Economy

Black Plague

[14th c.
Europe]
~25M killed (1/3 of
Europeans)

Power
scarce
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Solution
Economy

World War II

Women's participation
in workforce
Product innovation

technology, computers,
synthetic rubber,
rocketry, radar,
penicillin, internet



Surveillance
Economy

9/11

Reshaped security &
transportation policies
(worldwide)

personal privacy &
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Gig
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Rapid fiscal policy
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Pandemic Economy

"rather than [the capital markets] operating as an independent sphere, we are seeing that the value of everything, the entire \$80 trillion global economy, is linked to healthcare" – John G Singer

FAST@MPANY

05-11-20

From now on, every company must become a digital health company

The pandemic shows that businesses must take on a new responsibility for the health of their employees. Here's a to-do list to get you started.

FINANCIAL POST

NEWS - INVESTING - MARKETS - PERSONAL FINANCE - INNOVATION - FP COMMENT - ENTREPRENEUR - EXECUTIVE - FP

The Doctor Is In and Helping Bank of Montreal on Post-Virus Plan

(Bloomberg) — There's a doctor in the house, and Bank of Montreal is turning to him as it develops a post-pandemic plan.

Dominik Nowak, 28, joined last month as the Canadian bank's chief medical adviser to help with Covid-19 outbreak. He's been guiding executives on how to weather the crisis while dispensing advice on social distancing, working from home and protecting tellers from the highly contagious virus. With the pandemic peaking and companies mulling next steps, Bank of Montreal is relying on him and his team for their medical expertise.

"Our job is far from over," Nowak said in an interview. "BMO's plan-ahead strategy throughout the organization will really have to be driven through a medical lens, just as we drove the initial pandemic strategy."



on March 13, 2020 in Boston. [Photo by David L. Ryan/The Boston

Accenture: 'Every business will be a health business'

By Justin Harper
BBC News

15 April 2020

Coronavirus pandemic

BBC

NEWS



Taking the temperature of people visiting theme parks could become routine

Consultancy firm Accenture says all firms will have to be focused on health even after the coronavirus outbreak ends.

@ZaynaKhayat
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KEEP CALM & KEEP FUTURE PROOFING

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